ISG Provider Lens®

Global Capability Center (GCC) Services

A research report comparing service provider strengths and competitive differentiators in the GCC ecosystem

Customized report courtesy of:
Capgemini

QUADRANT REPORT | APRIL 2026 | GLOBAL

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Report Author: Gaurang Pagdi

GCCs shift to value-driven engines, with execution-led transformation defining the leaders

A market at a strategic inflection point

Global capability centers (GCCs) have reached a strategic inflection point. What began as cost arbitrage vehicles is now firmly established as enterprise-grade hubs for innovation, digital transformation and long-term competitive advantages. This ISG Provider Lens® study evaluates the service provider landscape supporting GCCs across two dimensions: design and setup and ongoing optimization and enhancement. The findings reflect a market in transition, where execution capability is rapidly becoming the defining measure of leadership and the basis on which provider relevance will be judged.

Market context: growth anchored in India amid global realignment

India continues to be the main hub for GCC growth. Its combination of deep talent pools, a mature ecosystem, supportive government policy and established delivery infrastructure continues to make it the default choice for enterprises building or expanding their global capability footprint. This dominance is not under threat in the near term, but it is being complemented by a broader geographic rethink that reflects both opportunity and necessity.

Enterprises are actively exploring multi-location strategies, with Eastern Europe, Southeast Asia and Latin America emerging as substantive complements to India-based delivery. Motivations include niche talent access, time zone coverage, geopolitical risk mitigation and regulatory proximity, but the underlying intent is consistent: to build more resilient, diversified GCC models with less concentration risk. The most strategically

The next generation of **GCCs** is built not for cost arbitrage but for **impact, scale** and transformation.

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advanced organizations treat multi-location strategies not as a hedge but as a deliberate architecture decision, aligning each geography to specific talent or delivery objectives.

Structural pressures are intensifying the urgency of this realignment. Rising wage inflation, persistent shortages of digital and engineering talent, increasing data sovereignty requirements and evolving regulatory complexity are forcing enterprises to design GCCs with far greater precision. Strategic intent must now be matched by operational discipline from day one, and providers that deliver this rigor, through location intelligence, regulatory expertise and workforce planning, are experiencing significantly higher demand.

The midmarket segment warrants particular attention in this context. Enterprises outside the largest global corporations are increasingly entering the GCC conversation, enabled by the democratization of setup models, the availability of managed and co-located delivery options, and growing evidence that GCCs are not the exclusive preserve of large multinationals. The expansion of the addressable market is creating new opportunities for providers with the flexibility and cost efficiency to serve organizations at earlier stages of global delivery maturity, while introducing design and governance considerations that differ considerably from the playbooks developed for large-scale enterprise GCCs.

Enterprise priorities: from cost efficiency to measurable business impact

The most significant shift in enterprise priorities is the shift from cost arbitrage as the primary GCC justification. Today, the business case for a GCC is increasingly built around value creation, encompassing revenue enablement, innovation output, decision intelligence and enterprise-wide transformation. Cost efficiency remains relevant, but it has been reduced to a baseline expectation rather than a strategic differentiator. Enterprises that continue to frame GCC performance primarily in cost terms are increasingly misaligned with market realities and their own competitive imperatives.

This shift is redefining what enterprises expect from their GCCs. Functions once considered too sensitive or complex for remote delivery, including product engineering, CX transformation, advanced analytics, risk management and compliance, are now being actively built within GCCs. The scope expansion is intentional and is reshaping the talent, governance and technology requirements attached to GCC investments. In many organizations, the GCC has moved beyond a support structure to become a primary vehicle for delivering the enterprise's digital transformation agenda.

Execution maturity has emerged as the critical bottleneck. Enterprises consistently report that the challenge is not ideation or strategy; it is translating ambitious transformation agendas into a scalable, operational reality. This is driving demand for providers that can move beyond advisory into end-to-end delivery accountability, as well as for operating models that embed intelligence and automation into core workflows rather than treating them as parallel initiatives. The demand for point solutions and disconnected pilots is declining sharply; enterprises want integration, coherence and measurable outcomes tied to strategic objectives.

AI is no longer a future consideration; it is a core design variable in how GCCs are structured, staffed and operated today. The most impactful deployments are not in standalone pilots but the embedding of intelligence into core workflows across finance operations, HR services, engineering delivery, analytics and CX. Providers with reusable, AI-enabled frameworks and industry-specific automation assets are substantially accelerating time-to-value for clients, while those relying on generic advisory are struggling to demonstrate comparable impact. The shift from AI as a capability narrative to AI as an operational reality is progressing faster than anticipated, creating a significant performance gap across the provider landscape.

Talent strategy is equally critical and increasingly complex. Enterprises are building specialized GCC capabilities in digital engineering, data science and applied

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AI, while balancing in-house development against the speed advantages of provider-led capability access. Hybrid workforce models that combine internal teams with provider-delivered capabilities are gaining traction but require governance maturity that many enterprises are still developing. GCC talent strategies must be dynamic, continuously updated and tightly aligned to the evolving innovation agenda of the parent enterprise.

Provider dynamics: transitioning from talent supply to value-led partnerships

The provider landscape is adapting to these enterprise shifts, but at an uneven pace. Leading providers are expanding their value propositions across the full GCC lifecycle, from location strategy and setup through operating model transformation and continuous optimization. They are investing in frameworks, accelerators and reusable assets that reduce setup timelines, lower risk and drive delivery consistency. They are also developing industry-specific solutions that enable engagement with a level of contextual depth unattainable through generic advisory.

However, a substantial segment of the market continues to operate primarily as a talent supply channel, particularly in early-stage GCC engagements. Staff augmentation remains the dominant commercial model for many providers, and the transition to outcome-driven, transformation-led engagements is gradual and uneven. This creates a significant gap between the narratives providers market and the delivery models enterprises actually experience — a gap that is increasingly difficult to sustain as procurement functions become more sophisticated in evaluating and structuring provider relationships.

Engagement model evolution is accelerating this pressure. Enterprises are migrating from time-and-material constructs to outcome-based agreements, BOT and hybrid BOT models and, in some cases, joint ventures that establish shared accountability for GCC performance. While the shift is not yet uniform, the trajectory is clear. Providers that can operate under outcome-linked commercial frameworks, absorb transition risk and demonstrate confidence in their delivery are gaining ground, while those anchored in effort-based models are increasingly competitively exposed.

A parallel transition is reshaping how providers package and monetize their capabilities. The market is shifting from talent as the primary unit of value to IP, methodology and proprietary accelerators as the core differentiators. Providers that have built repeatable, asset-led delivery models, such as GCC setup playbooks, operating model templates and AI-enabled workflow accelerators, are compressing timelines, reducing client risk and demonstrating a value proposition that extends significantly beyond headcount. Providers still leading with talent depth alone are finding that proposition increasingly commoditized.

Technology disruption is simultaneously expanding the scope of provider deliverables and elevating the governance standards for execution. Issues such as data residency, model governance, workforce reskilling and the responsible deployment of automation have become active operational requirements rather than theoretical risks. Both enterprises and providers are establishing frameworks that were not required even two or three years ago, creating a clear opening for providers with deep technology and compliance expertise to command substantially higher engagement value.

Execution capability — the ability to translate strategy into scalable operational outcomes — is emerging as the sharpest point of provider differentiation. Enterprises are applying greater rigor due to due diligence, looking beyond case studies to assess consistent, measurable business impact. Providers building credibility are those investing in delivery accountability, robust governance models and integrated operating frameworks. Positioning alone is no longer sufficient; the market is demanding proof.

Ecosystem leverage is reshaping provider competitiveness in ways not fully captured by traditional capability assessments. Partnerships with hyperscalers, SaaS platforms and specialized niche players are enabling providers to extend their capability footprint significantly beyond what in-house investment alone can sustain. The most effective providers

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are orchestrating these ecosystems to deliver integrated, technology-enabled GCC solutions, thereby creating a durable competitive advantage that is difficult for talent-led competitors to replicate quickly.

Outlook: execution capability will define market leadership

Looking ahead over the next 12-24 months, the GCC market will see a sharper divide between providers that can deliver tangible, scalable outcomes and those anchored in traditional models. India will remain the primary GCC hub, and demand for high-quality setup and optimization services will remain strong. However, the nature of that demand is changing, and providers that do not evolve their delivery constructs will face increasing displacement by those that do.

For enterprises, the strategic priorities are clear. Provider selection must be anchored in demonstrated execution capability, not advisory reputation alone. Intelligence and automation must be embedded into GCC operating models from the outset, not added as afterthoughts. GCC design must emphasize resilience — balancing India-led growth with thoughtful geographic diversification — and build governance structures that can absorb change without losing operational coherence. The window to build strategically differentiated GCCs is open, but it requires disciplined choices at every stage of the lifecycle.

For providers, the mandate is equally direct. The gap between capability narrative and delivery reality must be closed, not through better marketing but through investment in execution infrastructure, reusable assets, industry-aligned IP and governance models that allow enterprises to extend trust beyond the initial engagement. Providers that make this transition will be positioned at the center of an expanding, higher-value market; those that do not will see their addressable space contract as enterprises sharpen expectations of a true GCC transformation partner.

Execution capability is the new currency in the GCC market. As enterprises shift from cost arbitrage to value creation, providers that consistently deliver measurable outcomes at scale will define the next generation of GCC leadership.

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Provider Positioning

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	Design and Setup	Optimization and Enhancement
Accenture	Leader	Leader
Altimetrik	Product Challenger	Product Challenger
ANSR	Leader	Not In
Atos	Product Challenger	Product Challenger
BCT	Contender	Contender
Birlasoft	Contender	Product Challenger
Capgemini	Leader	Leader
CGI	Leader	Rising Star ★
Coforge	Rising Star ★	Product Challenger
Cognizant	Leader	Leader

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Provider Positioning

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	Design and Setup	Optimization and Enhancement
Covasant	Contender	Contender
Cyient	Product Challenger	Product Challenger
Datamatics	Not In	Product Challenger
Deloitte	Leader	Leader
Embark	Contender	Not In
EY	Leader	Leader
Firstsource	Market Challenger	Market Challenger
Genpact	Product Challenger	Leader
HCLTech	Leader	Leader
Hexaware	Leader	Product Challenger

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Provider Positioning

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	Design and Setup	Optimization and Enhancement
HTC Global Services	Not In	Product Challenger
IBM	Leader	Leader
Infosys	Leader	Leader
ITC Infotech	Product Challenger	Product Challenger
KPMG	Leader	Leader
Kyndryl	Product Challenger	Product Challenger
LTM	Product Challenger	Product Challenger
Ness Digital Engineering	Contender	Contender
Persistent Systems	Product Challenger	Product Challenger
PwC	Leader	Leader

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Provider Positioning

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	Design and Setup	Optimization and Enhancement
Randstad Digital	Market Challenger	Contender
TCS	Leader	Leader
Tech Mahindra	Rising Star ★	Leader
Torry Harris	Contender	Contender
Wipro	Product Challenger	Leader
YASH Technologies	Contender	Contender

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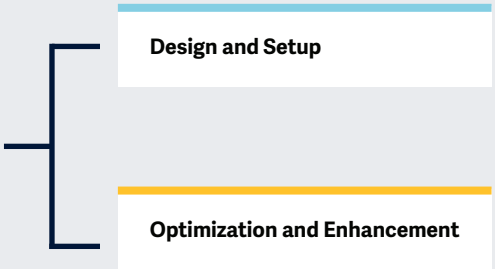
The **GCC Services 2026** study focuses on helping enterprises **evaluate providers** that support GCC setup and optimization.



Simplified Illustration Source: ISG 2026

Definition

The GCC Services 2026 study highlights the evolving provider ecosystem that enables enterprises to design, establish and optimize global delivery hubs.

Over the past year, the role of global capability centers (GCCs) has advanced well beyond efficiency and cost optimization. These centers are increasingly positioned as enterprise value creators, driving digital innovation, enabling revenue growth, orchestrating AI-led transformation and serving as strategic hubs for CX, product development and business insights. The rapid evolution of AI has accelerated this shift, with many GCCs embedding autonomous orchestration and predictive insights into their operations.

Service providers have progressed from supporting initial setup to acting as ecosystem orchestrators. Their scope includes advisory services on location and regulatory strategy, building modular and resilient operating models, delivering managed services and coinnovating industry-specific solutions.

Emerging models, such as Captive-as-a-Service (CaaS), hybrid build-operate-transfer (BOT) structures and multi-hub networks reflect a maturing landscape.

GCCs are increasingly designed as digital twins of headquarters, mirroring enterprise priorities, embedding governance and enabling fast rollout of global strategies. Equally important is the talent transformation agenda, where providers are moving beyond staff augmentation to support enterprises with workforce reskilling, AI fluency, leadership pipelines and industry-specific domain expertise.

The 2026 study highlights the pivotal role providers play in helping GCC evolve from traditional shared services into globally integrated, AI-enabled business platforms, positioned to optimize costs and drive agility, resilience and growth in a dynamic global economy.

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following two quadrants for services/solutions: Design and Setup and Optimization and Enhancement.

This ISG Provider Lens® study offers business and strategic-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on Global market

This ISG Provider Lens® study offers IT-decision makers: Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing provider.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

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Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

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Design and Setup

Who Should Read This Section

This report is valuable for providers offering **GCC design and setup services globally** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Strategy professionals

Should read this report to position GCCs as enterprise growth engines. The report explores how providers enable AI-driven transformation, digital-first operating models and global integration. Insights on location strategy, governance and innovation frameworks help align GCC design with long-term business objectives. It supports strategic decision-making for building resilient, multi-hub networks delivering agility, cost optimization and sustained value creation.

Procurement professionals

Should read this report to assess service providers' capabilities in GCC design and setup. The report highlights vendor strengths, pricing and partnership ecosystems, enabling informed sourcing decisions. It also covers managed services, BOT structures and captive-as-a-service models, helping procurement leaders negotiate cost-effective and scalable solutions while ensuring compliance, risk mitigation and alignment with enterprise transformation goals.

Compliance and legal professionals

Should read this report to understand GCC establishment and operations. The report details providers' expertise in regulatory navigation, tax structuring and risk frameworks across global jurisdictions. Emphasizing data governance, responsible AI and cybersecurity, the report highlights how legal teams can safeguard enterprise interests while enabling seamless global integration. It supports proactive compliance strategies for resilient, legally sound GCC models.

Change management professionals

Should read this report to guide cultural alignment and workforce transitions during GCC setup and transformation. The report outlines providers' capabilities in organizational change frameworks, talent re-skilling and leadership development. It emphasizes embedding enterprise values, governance and AI fluency into GCC operations, ensuring smooth adoption of new models and technologies. It helps drive engagement, minimize disruption and accelerate transformation success.

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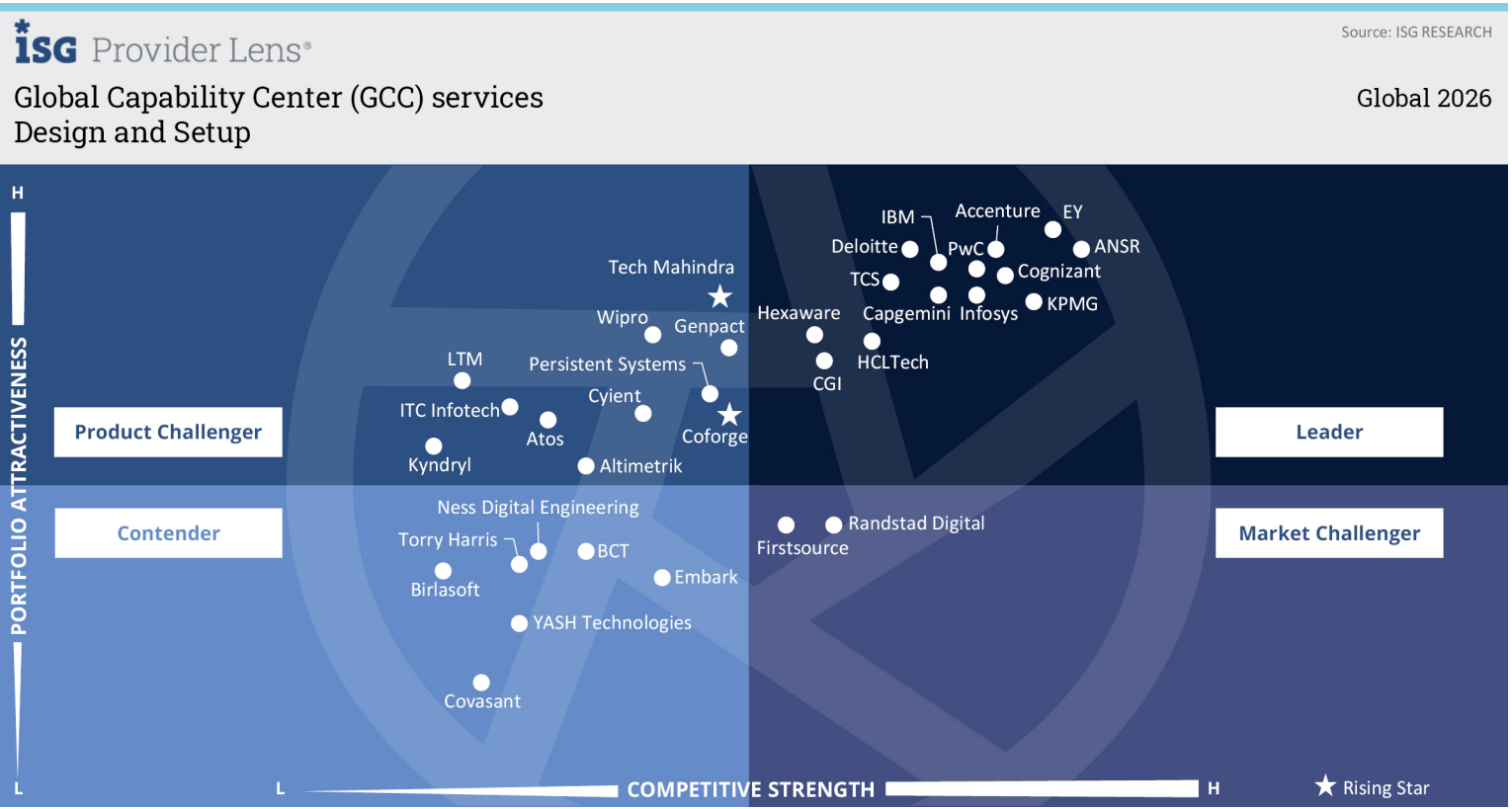

This quadrant assesses providers that guide enterprises through the **entire GCC establishment journey,** from **business case development and location selection to legal structuring** and **day-one operations.**

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Definition

This quadrant assesses providers that enable enterprises to design, establish and operationalize new GCCs. Providers serve as strategic advisors, helping enterprises determine whether a captive or GCC model is the right choice and develop a robust business case aligned with long-term enterprise goals. They advise on location strategy and site selection, balancing cost, talent availability, resilience and ESG considerations.

Beyond advisory services, providers support operating model design (including global process ownership, governance, risk and compliance), legal and tax advisory, and regulatory navigation. Increasingly, they also enable multi-hub and resilient footprints by consolidating operations across regions and embedding digital-first foundations. Providers may execute the setup directly or leverage their partner ecosystems to ensure a seamless ramp-up of operations. Effective change management and cultural alignment are prioritized, alongside building the GCC as a digital twin of headquarters to ensure alignment with enterprise strategy and global integration.

Eligibility Criteria

1. Has a **mature GCC advisory practice** that helps enterprises assess whether a captive or hybrid model aligns with their long-term strategic goals
2. Demonstrates strong capability in **global location strategy** and talent planning, advising on multi-hub models across India, EMEA, the Americas and APAC
3. Has expertise in **regulatory compliance, legal, risk and tax management,** either with in-house capabilities or through an **established partner ecosystem** to navigate complex local and global compliance frameworks during setup and operations
4. Incorporates **digital-first design principles,** embedding AI readiness, automation, cybersecurity and data governance into the GCC foundation; aligns GCC operations as a **digital twin** of headquarters to ensure integration with enterprise systems and governance models
5. Shows proven ability to manage **organizational change and cultural alignment,** enabling smooth transitions and integration of enterprise values, governance and operating principles within the GCC
6. Provides documented **case studies** of successful **GCC setups across industries and geographies** that demonstrate achievement of targeted outcomes, such as cost optimization, capability creation and operational scalability

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Observations

The GCC design and setup landscape is evolving rapidly, with enterprise expectations outpacing many providers' capabilities. The shift from cost-led establishment to value-led capability building is now well-established, but its implications are still rippling through the market. Providers that have invested in structured setup methodologies, proprietary frameworks and deep regulatory expertise are pulling ahead, while those relying on generic advisory without differentiated execution capability are facing increased scrutiny.

Compared with last year, the quadrant reflects a more contested and dynamic competitive environment. Established players have reinforced their positions through ecosystem expansion and investments in frameworks, while a cohort of focused, technology-led providers continues to close the gap with faster, leaner, asset-driven setup models. The overall trajectory is toward greater specialization and delivery accountability.

Three themes are defining the current setup agenda. First, the integration of AI, automation and cloud at the outset of GCC design has become a baseline enterprise requirement; providers must demonstrate these capabilities as part of their core setup offering. Second, governance and compliance complexity continues to intensify, particularly in India and other high-volume GCC geographies, making regulatory expertise a decisive factor in provider selection. Third, the continued blurring between captive GCC and managed service models is driving demand for engagement flexibility, with enterprises seeking providers that can operate credibly across the full spectrum from advisory through end-to-end delivery accountability.

From the 48 companies assessed for this study, 34 qualified for this quadrant, with 14 being Leaders and two Rising Stars.

accenture

Accenture's GCC design and setup practice combines strategic advisory, AI-powered scenario modeling, and flexible engagement models to help enterprises envision, blueprint and operationalize high-impact GCCs at speed.

ANSR

ANSR delivers end-to-end GCC design and setup through a zero-CapEx, subscription-led model, combining advisory, infrastructure, talent and operational services to launch scalable, enterprise-grade capability centers within 2-12 weeks.

Capgemini

Capgemini's GCC design and setup practice integrates end-to-end advisory, flexible operating models (BOT, assisted or JV) and global location strategy, enabling enterprises to establish future-ready capability centers with speed, compliance and scalability.

CGI

CGI's GCC setup approach leverages 30 years of delivery heritage, deep client relationships and a structured management foundation to deliver end-to-end setup, from feasibility and compliance to leadership hiring and technology enablement.

cognizant

Cognizant delivers modular, end-to-end GCC build and assisted captive models by integrating strategy, legal setup, talent, infrastructure and digital engineering, enabling enterprises to launch AI-ready, innovation-led global hubs.

Deloitte.

Deloitte combines a deep advisory heritage with execution capability to support end-to-end GCC establishment. Its alliance with Embark bridges strategy and on-ground readiness, spanning location, legal entity, compliance and talent across diverse markets.

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EY brings over 25 years of GCC experience, combining industry-led advisory with technology delivery, alliances and capabilities center as a service to accelerate launch while embedding governance, risk and AI-by-design.

HCLTech combines GCC advisory, build, talent transformation and IP-led acceleration under its GCC 360 framework, enabling enterprises to design, set up and scale AI-powered, domain-led GCCs with speed and flexibility.

Hexaware combines SMC Squared's deep BOT-led GCC setup expertise with AI-led accelerators and global delivery scale to design, build and operationalize future-ready GCCs across India and emerging global locations.

IBM's GCC design and setup approach combines deep advisory expertise, ecosystem partnerships and AI-led delivery frameworks, enabling enterprises to move from business cases to operational reality with speed, precision and long-term sustainability.

Infosys positions its GCC offering as an AI-first, flexible build model integrating hybrid BOT, assisted setups and nano GCC constructs, enabling enterprises to accelerate value realization from day one through digital workforce infusion.

KPMG's GCC design and setup approach combines deep industry specialization, end-to-end advisory, outcome-linked commercial models, and a tightly integrated ecosystem of alliance partners to deliver scalable, future-ready capability centers.

PwC's GCC design and setup approach integrates strategy-through-execution capabilities, proprietary location analytics and a broad global ecosystem to guide enterprises from concept to operational GCC across greenfield, BOT and managed service models.

TCS delivers end-to-end GCC design and setup through strategy advisory, BOT-led execution, AI-native operating models and deep ecosystem partnerships, enabling enterprises to build scalable, innovation-focused global value and innovation centers.

Coforge's (Rising Star) GCC design and setup approach is anchored in client control, domain-led talent strategy and flexible engagement models. Its structured methodology drives scalable, outcome-committed GCC setups across emerging global delivery locations.

Tech Mahindra's (Rising Star) GCC design and setup capabilities are anchored in its own GCC heritage, offering BOT-led delivery, AI-native blueprinting and a formalized partner ecosystem to accelerate enterprise entry into India.

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Leader

"Capgemini differentiates in GCC design through its transformation-led philosophy, proven BOT and assisted models, and global operating scale, enabling enterprises to move from concept to execution with speed and governance."

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Capgemini

Overview

Capgemini is headquartered in Paris, France. It has more than 342,700 employees worldwide. In FY24, the company generated €22.1 billion in revenue, with Applications and Technology as its largest segment. Capgemini provides end-to-end solutions in the GCC space, supporting organizations from design and setup to optimization and transformation. With expertise in advisory, automation and innovation, it helps enterprises build, scale and enhance GCCs, leveraging its global experience and industry best practices to drive efficiency, cost savings and business value.

Strengths

Transformation-led blueprinting: Capgemini positions GCCs as enterprise transformation platforms rather than cost centers. Its advisory integrates location strategy, operating-model design, governance and talent architecture into a structured roadmap aligned with headquarters and local stakeholders, ensuring a value-driven setup from day one.

Proven multi-model execution: Capgemini demonstrates maturity across BOT, assisted, carve-out and joint venture (JV) models. Successful end-to-end BOT cycles, including transfer phases, and rapid 90-day assisted setups highlight disciplined execution, parallel workstream management and controlled knowledge transition.

Global reach with local depth: With presence across India, Europe, Africa and APAC, and delivery spanning Tier 1 and Tier 2 cities, Capgemini combines global orchestration with local execution strength. Its expanded India footprint and cross-border model enable scalable, resilient GCC establishment.

Integrated domain ecosystem: Strong alliances with hyperscalers, enterprise platforms and domain ecosystems, complemented by investments in AI capabilities, allow Capgemini to embed digital, engineering R&D (ER&D) and innovation capabilities into GCCs from inception.

Caution

Capgemini could further systematize and publicize quantified business outcomes, such as speed-to-value, productivity gains and innovation impact, to reinforce its differentiation. This approach will strengthen visibility of its GCC setup leadership across global markets.

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Optimization and Enhancement

Who Should Read This Section

This report is valuable for providers offering **GCC optimization and enhancement services globally** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Operations managers

Should read this report to enhance efficiency and scalability in GCCs. The report details provider capabilities in process standardization, governance frameworks and performance benchmarking. With insights on automation at scale, AI integration and resilient multi-hub models, the report helps operations teams optimize workflows, reduce costs and ensure seamless global delivery. It supports building agile, outcome-driven operating models aligned with enterprise priorities.

Technology professionals

Should read this report to learn how GCCs are evolving into AI-enabled digital platforms. The report highlights providers' expertise in platform modernization, cloud-native architectures, cybersecurity and data governance. It covers advanced technologies, such as GenAI, automation and analytics, enabling tech leaders to design robust, scalable ecosystems. It guides informed decisions to embed innovation and accelerate digital transformation across global operations.

Business professionals

Should read this report to leverage GCCs as strategic growth engines. The report explains how providers enable cost optimization, innovation and enterprise value realization through AI-driven transformation and global integration. The study offers insights into governance, talent strategies and ecosystem partnerships, helping businesses align GCC models with long-term objectives and supporting decisions that drive agility, resilience and sustainable competitive advantage.

Data management professionals

Should read this report to focus on governance, security and analytics within GCCs. The report outlines providers' capabilities in data modernization, responsible AI and compliance frameworks. Emphasizing predictive insights, workflow orchestration and robust data governance models, the study helps professionals ensure integrity, privacy and regulatory adherence. It enables building data-driven GCCs that support innovation and informed decision-making at scale.

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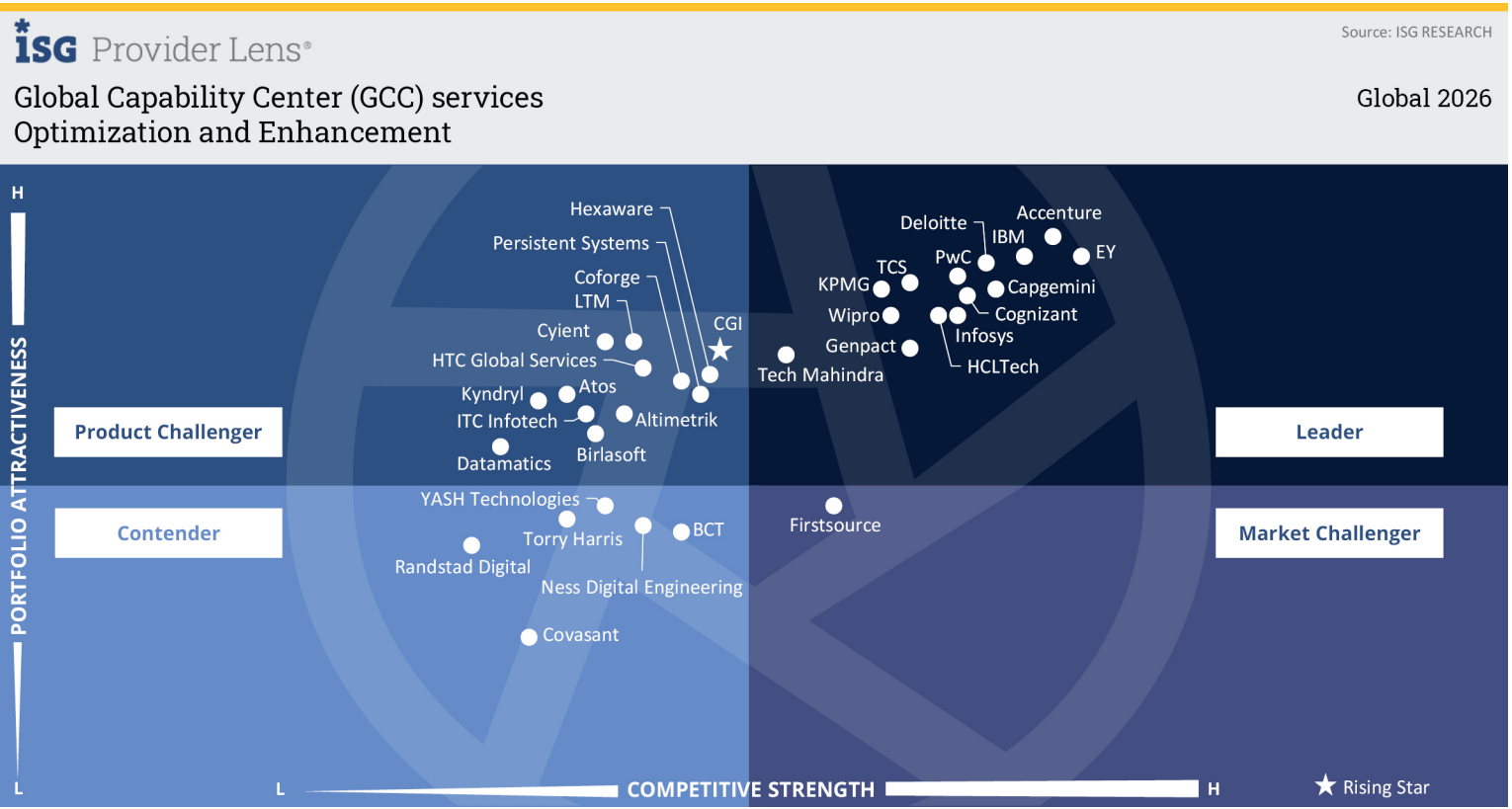

This quadrant assesses providers that help GCCs shift from **operational efficiency to strategic value,** with capabilities spanning **benchmarking, workforce evolution, digital integration** and **innovation enablement.**

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Definition

This quadrant evaluates providers that help enterprises scale, modernize and transform existing GCCs into globally integrated, AI-enabled business platforms. Providers offer services across process reengineering, benchmarking and digital transformation, and they embed GenAI, agentic AI and automation at scale into their operations.

They support talent transformation through workforce upskilling programs, leadership pipelines and AI fluency initiatives while strengthening domain-specific expertise. Providers help enterprises evolve their GCCs into innovation hubs by cocreating industry solutions, advancing sustainability initiatives and improving CX capabilities. They also expand service scope, strengthen data-driven decision-making and enhance agility through flexible, outcome-oriented operating models.

The focus has shifted from cost optimization to enterprise value creation, where providers position GCCs as strategic growth partners by leveraging ecosystem collaboration and modernizing delivery models.

Eligibility Criteria

1. Demonstrates capability to **design, build** and **maintain** robust **digital platforms** and scalable technology ecosystems that support complex, multifunctional GCC operations across geographies
2. Has a strong track record managing large- and medium-scale **digital** and **process transformations** across industries, modernizing legacy operations, driving standardization and delivering measurable business outcomes
3. Offers deep expertise in **change management** and transformation **governance** to ensure seamless adoption of new **operating models,** technologies and enterprisewide processes
4. Provides tailored **optimization strategies** aligned to each enterprise's unique business priorities, encompassing **process reengineering, automation at scale** and data-driven decision frameworks
5. Has the ability to operationalize **advanced technologies,** including GenAI, agentic AI, intelligent automation, analytics and cloud-native architectures, to **foster innovation** and enhance productivity
6. Delivers end-to-end services for GCC **performance benchmarking, maturity assessment** and continuous improvement, embedding best practices across functions
7. Maintains a **multidisciplinary team** with **deep domain,** digital and transformation expertise and offers multiple support models

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Observations

This quadrant reflects a market that has moved decisively beyond incremental efficiency gains. Enterprises are no longer asking how to run their GCCs better; they are asking how to reposition them as strategic value drivers embedded at the core of the enterprise operating model. This shift elevates the complexity and ambition of the optimization mandate and, in turn, raises expectations of providers supporting this phase of the GCC lifecycle.

The provider landscape is responding with greater sophistication: established players are deepening their transformation capabilities and investing in AI-led operating model redesign, advanced analytics and outcome-linked delivery frameworks. Compared with last year, the quadrant reflects broader provider participation as more firms develop dedicated optimization practices and move beyond the setup-centric positioning that has historically defined much of the market.

Three areas are shaping the current optimization agenda. First, AI and hyperautomation have moved from pilots to production; enterprises now expect providers to deliver intelligent workflows, process mining and predictive capabilities as part of a mature, integrated transformation offering rather than as standalone tools. Second, talent transformation is as important as process transformation, with GCCs investing heavily in AI proficiency, continuous upskilling and specialized capability development to keep pace with evolving enterprise demands. Third, the shift from cost savings to measurable business impact is redefining how optimization success is measured; enterprises are demanding outcome frameworks, benchmarking rigor and governance models that demonstrate value realization beyond operational metrics.

From the 48 companies assessed for this study, 34 qualified for this quadrant, with 14 being Leaders and one a Rising Star.

Accenture leverages Synops 2.0, agentic AI frameworks and process maturity diagnostics to help standing GCCs evolve from foundational operations to intelligent, reinvented capability hubs, driving measurable outcomes in productivity, efficiency and innovation.

Capgemini's GCC optimization practice leverages AI, GenAI and domain-led transformation frameworks to evolve existing centers from cost-focused delivery units into innovation and value-creation engines with measurable business outcomes.

Cognizant enhances GCC maturity through AI, automation, operating model redesign and proprietary platforms, helping centers transition from cost-efficient delivery units to innovation-driven, value-based transformation engines.

Deloitte supports GCC evolution from operational centers to CoEs through transformation-led engagements in AI integration, risk modernization, talent strategy and CoE development, helping GCCs generate measurable enterprise value beyond cost efficiency.

EY's GCC optimization practice focuses on evolving established centers through intelligent operations frameworks, AI-driven productivity enhancement, managed services, and a global ecosystem of peer networks, thought leadership and reskilling academies.

Genpact brings decades of process intelligence, deep domain expertise and AI-native capabilities to GCC optimization, leveraging its captive-to-provider heritage to drive measurable transformation outcomes.

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HCLTech

HCLTech enables GCC optimization through AI-driven run and transform suites, industry-grade AI use cases and platform-led modernization, helping enterprises evolve GCCs into innovation, engineering and AI acceleration hubs.

IBM

IBM drives GCC optimization through AI-infused modernization, value-case-driven transformation and ecosystem-enabled innovation, helping mature centers transition from cost centers to revenue-generating and enterprise-influencing hubs.

Infosys

Infosys supports mature GCCs through AI-led scale and transformation programs, combining process modernization, agentic AI infusion and hybrid operating models to reposition centers as innovation and value-acceleration hubs.

KPMG

KPMG drives GCC optimization through AI-led transformation, outcome-based delivery models and deep industry expertise, helping centers move from cost efficiency to enterprise value creation and future-fit operating architectures.

pwc

PwC's GCC optimization practice helps enterprises reinvent existing centers through process reengineering, AI-driven automation, CoE buildout and managed services, enabling centers to evolve from transactional hubs into high-value capability drivers.

tcs TATA CONSULTANCY SERVICES

TCS advances established GCCs toward innovation-centric operating models through AI-led transformation, proprietary platforms, co-innovation frameworks and enterprise-grade capability building across IT, engineering and business operations.

TECH mahindra

Tech Mahindra leverages deep run-operate experience, structured governance models and AI-embedded operational enhancements to optimize and scale mature GCCs across industries and geographies.

wipro

Wipro's GCC optimization approach leverages its Fusion GCC framework, AI-native delivery platforms and strong client relationships to enhance GCC maturity, transforming cost centers into capability-driven, innovation-led strategic hubs.

CGI

CGI's (Rising Star) GCC optimization approach enables capability centers to move beyond execution into transformation, leveraging AI platforms, outcome-based delivery models and deep domain expertise to scale impact and realize long-term enterprise value.

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Leader

"Through AI industrialization, ER&D integration and maturity-driven transformation frameworks, Capgemini helps GCCs move from scale to value, embedding measurable business impact into ongoing operations."

Gaurang Pagdi

Capgemini

Overview

Capgemini is headquartered in Paris, France. It has more than 342,700 employees worldwide. In FY24, the company generated €22.1 billion in revenue, with Applications and Technology as its largest segment. Capgemini supports GCC optimization and enhancement by driving process efficiency, automation and innovation. Through market assessments, value realization, cost optimization, digital transformation and workforce upskilling, it helps organizations enhance operational effectiveness, improve scalability and maximize business value from their GCC operations.

Strengths

AI and GenAI as core transformation levers: Capgemini has delivered over 400 GenAI programs from India, embedding capabilities such as GenAI Factory™, GenAI at Scale™, RAG Factory™ and its proprietary RAISE™ platform directly into GCC optimization engagements. These are not standalone deployments but reusable, industrialized accelerators that enable GCCs to rapidly build AI capability, reduce time-to-value and scale adoption across functions and geographies.

Ecosystem-powered innovation architecture: Capgemini's optimization engagements are amplified by a robust partner ecosystem, spanning AWS, Azure, Oracle, IBM, Palantir and IQVIA, complemented by active collaborations with academic institutions and startups in India and Europe. This ecosystem enables GCCs to access frontier technology, co-create domain-specific solutions and build indigenous innovation capability, particularly relevant for life sciences, pharma and automotive GCCs seeking R&D differentiation.

Structured maturity evolution: Capgemini conducts diagnostic-led assessments to redesign service models, governance and workforce mix. These engagements demonstrate its ability to shift GCCs from transactional delivery to higher-value mandates aligned to enterprise transformation agendas.

Caution

Although Capgemini's optimization credentials are well-supported by a diverse set of industry engagements, it should focus on developing a more standardized impact measurement framework to differentiate itself in the increasingly competitive GCC optimization market.

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Appendix

The ISG Provider Lens® 2026 – Global Capability Center (GCC) Services study analyzes the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of April 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Global Capability Center (GCC) Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

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Lead Author

Gaurang Pagdi
Lead Analyst

Gaurang brings over 22 years of experience in the Finance & Accounting (F&A) domain, having led delivery operations for industry leaders in Banking, Telecom, and E-Commerce. He has also served as a Digital Transformation Consultant with an F&A fintech, working with clients across diverse industries.

His expertise spans delivery excellence and business transformation, extending beyond digital transformation to encompass process and people transformation—offering a holistic approach to building future-ready businesses.

At ISG, Gaurang leads multiple research studies, including those on F&A, Workday ecosystem, Human Resources Outsourcing, and Global Capability Centers (GCCs). His research focuses on the intersection of customer experience, digital transformation, analytics, AI, and automation.

Research Analyst

Akshay Hiremath
Research Analyst

Akshay S Hiremath is a research analyst at ISG and supports ISG Provider Lens® studies on HCM Technology Platforms, Payroll Solutions and Services, and Transformational HRO studies. He supports the lead analysts in the research process and authors the global summary report. He also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. He has been associated with ISG since 2022.

Prior to this role, he was involved in preparing customized reports for various clients mainly related to HR services such as Permanent Recruitment, Temporary Staffing, and Corporate Learning and Development., through secondary research that included market analysis, supplier analysis and profiling, and industry best practices.

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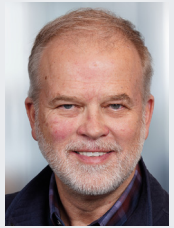
Namratha Dharshan
Chief Business Leader

Namratha brings over 19 years of market research experience, leading the ISG Provider Lens® program focused on BPO and AI and Analytics. Namratha also leads the India Research team and is a speaker on ISG's flagship platform, the ISG Index. She leads the ISG Provider Lens BPO charter that includes coverage on AI, GenAI and analytics. The program includes more than 20 different reports. She is also responsible for delivering research on service provider intelligence. As part of her role, she heads a team of analysts and manages the delivery of research reports for the Provider Lens® program.

She is principal analyst and is responsible for authoring thought leadership papers and service provider intelligence report in the areas of BPO focused on customer experience and contact center services. She has also authored other horizontal service line reports like finance and accounting and vertical focused reports for insurance. She is also part of Senior Leadership Council for India Research and represents a team of over 100 research professionals.

IPL Product Owner



Jan Erik Aase
Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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ISG Provider Lens®

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For more information about ISG Provider Lens® research, please visit this webpage.

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ISG

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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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ISG Provider Lens®

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REPORT: GLOBAL CAPABILITY CENTER (GCC) SERVICES

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