HEIDRICK & STRUGGLES

ARTICLE 1

GCCs as integrated business centres of excellence: The evolution

There was a time when Global Capability Centres (GCCs) were largely non-business driven, with a focus primarily on corporate functions. Established by multinational companies (MNCs) as offshore units to centralise and execute functions, they were perceived in a similar way to traditional Information Technology (IT) or Information Technology Enabled Services (ITeS) organisations — dependable and built to deliver at scale, with cost as a primary focus.

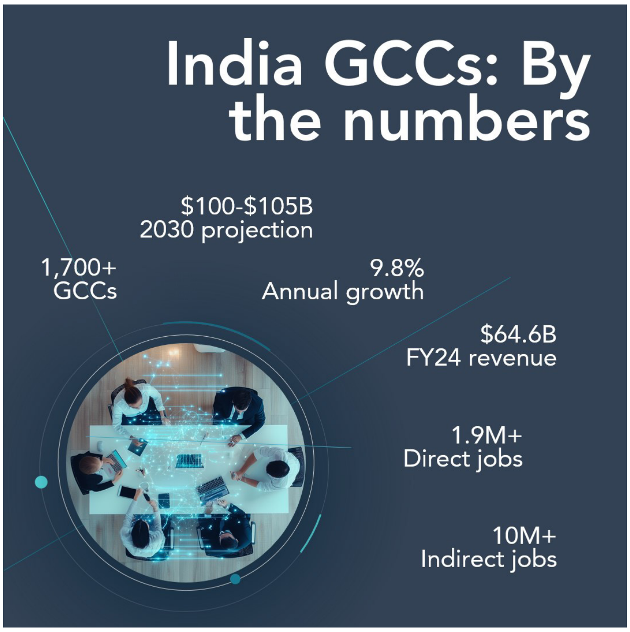
However, that description now feels incomplete. GCCs have evolved into strategic hubs that drive business growth, transformation and agility, and they increasingly handle more complex line items across the organisation's value chain, aligned more closely with the strategic vision of the company.

Why India is the GCC capital of the world?

- Access to skilled talent pool
- Supportive governance framework
- Economic growth and stability

Their role across the enterprise has widened too. What once sat closer to the back office now stretches from front to back, across business and corporate functions such as finance shared services, HR shared services, legal shared services, compliance operations, and risk shared services, linking corporate functions more directly to business priorities.

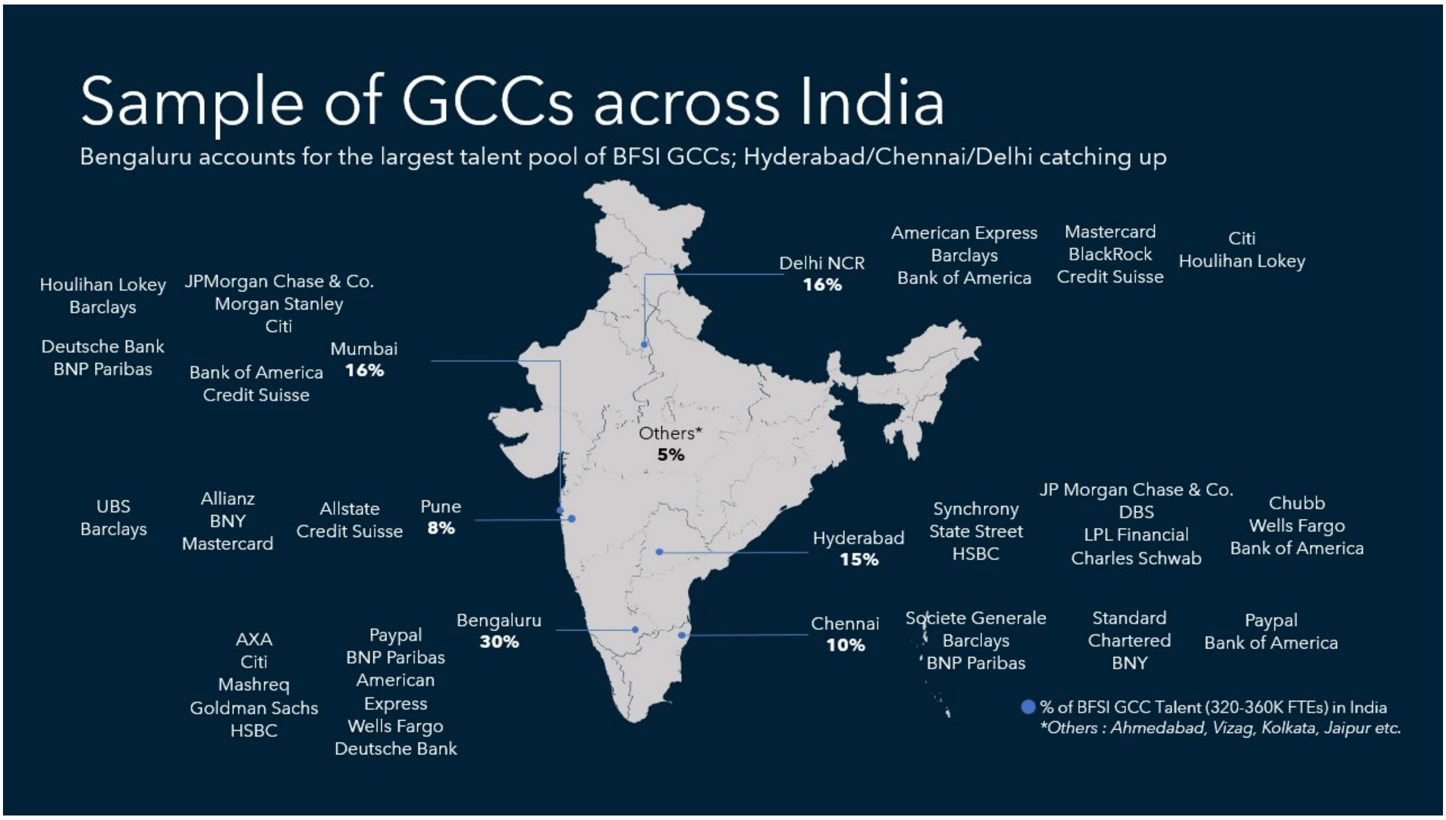
As GCCs expand in scale and importance, greater emphasis is now placed on talent management, regulatory and governance, and enterprise transformation. India's skilled talent pool, economic growth and stability, and a supportive governance framework have allowed GCCs in India to move into a far more strategic role, creating conditions to evolve faster and further here than in many other markets. Commanding over 55% of the worldwide GCC market, India arguably sits at the centre of the GCC evolution.

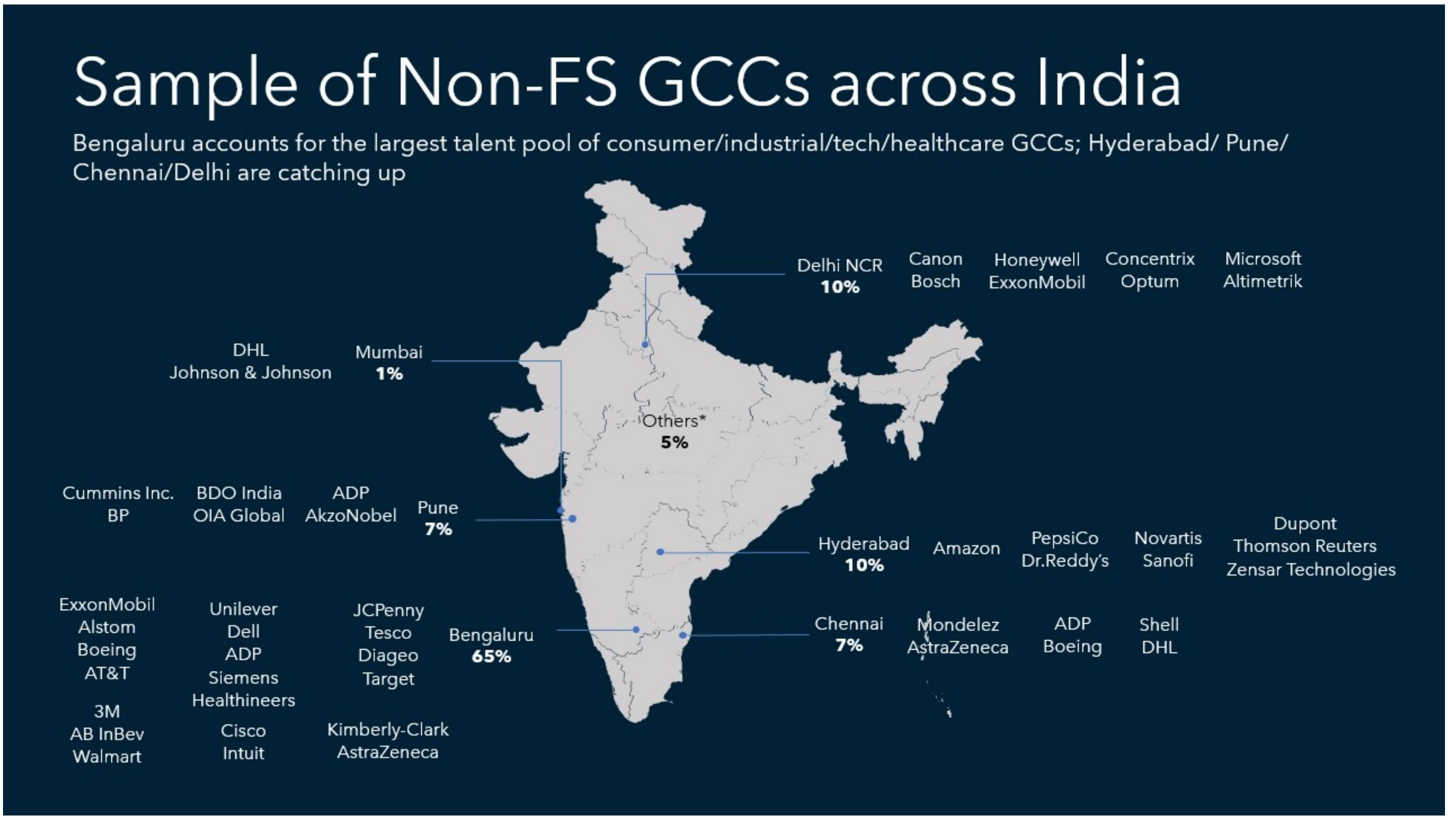


More than a footprint

India's GCC story is now too large to be understood purely through the old language of support work and delivery efficiency. As of December 2025, the country hosts more than 1,700 GCCs, with the market projected to reach US$100–105 billion by 2030. In just five years, combined revenue has risen from US$40.4 billion in FY19 to US$64.6 billion in FY24, growing at 9.8% annually, while current direct employment has reached 1.9 million professionals and the wider employment impact now exceeds 10 million jobs indirectly.

Those numbers matter not only because they are large, but because they signal how deeply GCCs are now embedded in the Indian economy and in the operating models of MNCs. What was once treated as a functional footprint has become a far more consequential part of how global organisations build, run and scale capability.





That depth is visible across India's leading GCC cities. Bengaluru remains the epicentre, hosting more than 880 centres and cementing its position as the deepest pool of engineering and AI talent available to multinational GCCs, while Hyderabad, Pune, NCR, Chennai and Mumbai are each developing distinct sector strengths of their own.

From hubs to leadership centres

As the global leader for GCCs, leadership and decision-making are increasingly being anchored in India. Global leadership roles are running portfolios across multiple functions from within Indian GCCs.

That marks a meaningful change in what an integrated business Centre of Excellence (CoE) actually is. Once global roles begin to sit in India, and once country leadership is paired with functional or regional responsibility, a GCC starts to look less like a support engine and more like a leadership platform. The change is not only in the scale of work being done, but in the level of ownership these centres are trusted to hold.

It is no longer unusual for companies to locate chief technology officers, product general managers, chief customer officers or global heads of engineering in India. A few years ago, those appointments would have been exceptions. Today, they are becoming more frequent. At Heidrick & Struggles, we have seen leadership hiring across Indian GCCs increase by up to threefold in recent years.

Seen this way, the next phase of the GCC story is not simply about taking on more complex or higher-value work. It is about where the enterprise chooses to place judgement, accountability and leadership trust. India's relevance in that shift comes not just from its depth of talent, but from the fact that it is increasingly being treated as a place from which global businesses can be led.

Building global-ready leaders

If GCCs in India are becoming CoEs, can they also become places where global-ready leaders are built? The opportunity is clearly there, but so is the gap.

We're seeing from our work that while 66% of organisations want to create global roles in India, only 12% have been able to select local leaders for those roles. At the same time, 90% of selected candidates in global roles are regarded as successful.

What comes through most clearly is a question of readiness. The pressures are familiar enough, from skills-based hiring and competition for talent to the harder task of being global in a local context. Meeting that challenge will depend on treating skills as currency, giving greater weight to global experience and exposure, and making succession planning a more deliberate priority.

That last point matters especially now. Indian boards clearly recognise the importance of leadership succession, yet more than half still handle it on an "as-needed" basis rather than treating it as a continuous discipline. That inconsistency risks slowing down the leadership pipeline while India's leadership role is accelerating.

For India to fully capitalise on this opportunity, organisations will need strong global sponsorship and leaders who can operate cross-culturally, engage with global customers, and bring commercial acumen beyond India. Success will also depend on blending India's deep local talent pool with global expertise — including attracting specialist expatriate talent and strategically repatriating members of the global Indian diaspora to accelerate knowledge transfer and strengthen in-house capabilities.

One recent search illustrates this shift. A senior regional role spanning six countries was relocated from London to India, where most of the company's relevant headcount sits. As GCCs become more strategic, leadership roles are increasingly anchored where the business, talent and operational centre of gravity reside.

The road ahead

If India's GCCs are becoming true integrated business centres of excellence, their next test will be whether they can build and sustain the leadership bench that role demands. That is where the conversation naturally turns next, to how talent moves through these ecosystems, how global-ready leaders are formed, and why mobility is becoming such a defining part of the GCC story.

**This article is the first in a three-part series exploring the evolution of Global Capability Centres (GCCs), with subsequent pieces examining talent mobility and succession planning in greater detail.*

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