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:

accenture

QUADRANT REPORT | MARCH 2025 | GLOBAL

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GCCs are transforming from support centers to strategic hubs and driving innovation

The global capability center (GCC) market is undergoing a rapid transformation, evolving from traditional cost-saving hubs to strategic enablers of enterprisewide digitalization. Organizations are increasingly looking beyond labor arbitrage and are instead positioning their GCCs as CoEs that drive innovation, enhance CX and optimize business operations.

As enterprises seek increased operational resilience and digital agility, GCC providers are expanding their service portfolios beyond conventional outsourcing. Leading providers are integrating AI-driven automation, advanced analytics and industry-specific expertise to create end-to-end solutions that deliver long-term value. This strategic shift is redefining the GCC landscape, requiring providers to evolve from transactional engagements to becoming true business transformation partners. The demand for highly specialized digital capabilities within GCCs is increasing, with enterprises expecting providers to help build, scale, innovate and continuously optimize operations.

The evolution of GCCs from cost arbitrage to digital powerhouses

The role of GCCs has evolved significantly over the last decade. Initially established as a back-office initiative aimed at cost reduction, these centers have now transformed into digital nerve centers that support critical operations and drive competitive differentiation. Enterprises are no longer using GCCs solely for IT support and finance functions; they are increasingly leveraging these centers for AI-driven automation, real-time analytics and cybersecurity resilience.

The shift toward digital transformation has redefined enterprises' perspective regarding their GCCs. The adoption of intelligent automation and AI-driven decision-making is allowing enterprises to enhance process efficiency and business outcomes. GCCs are increasingly being positioned as innovation hubs wherein enterprises can test and deploy

Next-gen GCCs will evolve into **innovation hubs,** powered by **AI** and **hyperautomation**

new digital capabilities before scaling them across the organization. With an increased focus on business intelligence and predictive analytics, enterprises are leveraging their GCCs to generate real-time insights that improve risk management, compliance and operational efficiency.

domain-specific capabilities are also becoming a major focus area for enterprises. Many are turning their GCCs into domain-focused CoEs, allowing them to develop expertise in key areas such as regulatory compliance, digital supply chains and CX management. In addition, enterprises are modifying their GCC strategies to ensure compliance with evolving global data privacy and AI governance regulations. The evolution of GCCs necessitates that providers deliver AI-driven solutions that enhance agility, cost efficiency and business resilience.

Strategic approach to GCC design and setup

As enterprises scale their GCC investments, they are leveraging flexible setup models that align with their digital transformation goals, risk management strategies and operational scalability needs. The Greenfield GCC model offers full ownership and control but requires significant investment. In contrast, the Build-Operate-Transfer (BOT) model allows enterprises to transition ownership after an initial operational period managed by an external provider. Joint ventures (JVs) enable collaboration with local entities to reduce risk and leverage market expertise. The assisted GCC model provides initial operational support from providers while enterprises maintain long-term control. Many enterprises are also adopting multilocation hybrid models, diversifying their GCC footprints across geographies to balance risk, compliance and access to specialized talent.

Beyond structural decisions, enterprises must also focus on digital and AI readiness, ensuring that modern GCCs are built with cloud-first, automation-driven architectures. Talent strategy is equally critical, as enterprises must develop AI, data analytics and cybersecurity capabilities to create future-ready GCCs. Providers play a key role in navigating these complexities, offering expertise in location strategy, digital infrastructure design and AI-first process enablement. Enterprises are now looking for GCC providers that help with the setup process and take an active role in ensuring long-term scalability and digital innovation.

The race to capitalize on GCC growth

The rapid expansion of the GCC market has attracted a diverse range of providers. While traditional consulting firms have historically dominated the space, new entrants — including managed services and technology providers — are now aggressively competing for market share. The GCC market has become an area of focus for multiple service providers, including those that traditionally focused on IT and business process outsourcing but are now shifting toward strategic GCC advisory and operational support.

Leading IT services firms are investing in GCC setup and operations, despite the potential risk of cannibalizing their existing outsourcing businesses. Technology and operations providers, with deep expertise in AI, automation and cloud-native solutions, are uniquely positioned to build digital-first GCCs, integrating AI-native operations from the beginning. Many providers are also forming alliances with hyperscalers, tech startups, real estate providers and consulting firms to deliver end-to-end GCC solutions. This competitive shift underscores the need for these providers to effectively integrate technology, automation and strategic advisory to position themselves as key partners in the new era of GCC growth.

GCC optimization driving AI, hyperautomation and digital innovation

Once established, GCCs are focusing on optimization strategies that enhance operational efficiency and business impact. The shift toward self-learning, AI-powered operations is defining the next phase of GCC evolution, requiring organizations to implement AI-powered process automation to streamline workflows and reduce human intervention in finance, procurement and HR operations. GCCs are also leveraging hyperautomation by integrating AI, RPA and ML to create self-optimizing business processes.

A cloud-first approach is becoming a foundational principle for GCCs, enabling enhanced security, scalability and agility.

Workforce augmentation through AI is also gaining traction, allowing employees to focus on high-value, strategic tasks while AI-driven automation handles routine processes. Providers must align their solutions with AI-first, automation-driven and insight-led operating models, assuring real-time decision intelligence and effective enterprise integration. GCCs that successfully integrate AI and digital automation will be able to achieve long-term cost savings, improve business decision-making and enhance customer engagement.

Evolution of GCCs into AI-driven, autonomous and strategic business units

In this decade, GCCs will no longer function as transactional service hubs; they will operate as autonomous, AI-driven decision-making units that drive digital transformation at scale. Agentic AI will play a central role in enabling self-optimizing operations, where AI-powered decision models continuously analyze, refine and enhance GCC processes with minimal human intervention. Enterprises will also leverage generative AI (GenAI) for knowledge management, automating regulatory compliance, financial forecasting and strategic planning.

AI-driven digital twins will emerge as a powerful capability, allowing organizations to simulate real-time scenarios to optimize GCC performance, assess risks and improve business agility. This transition toward autonomous, AI-first GCCs presents an unprecedented opportunity for providers that invest in AI-native service delivery models and predictive automation. Organizations that adopt an AI-first GCC model will be strongly positioned to handle future market disruptions and drive enterprisewide digital transformation at an accelerated pace.

AI-driven GCCs shaping the future of global enterprises

The GCC market is at a critical juncture, with enterprises transitioning toward AI-driven, automation-first and insight-powered service models. The providers that will lead this transformation are those that can seamlessly integrate next-generation AI, predictive analytics and digital-first automation solutions. The GCC model is shifting from cost efficiency to digital transformation leadership, making AI-first, automation-driven service delivery the new standard.

Providers must invest in hyperautomation, AI-driven knowledge platforms and real-time decision intelligence to remain competitive. As GCCs continue to expand and evolve, leading the AI-native enterprise transformation will be key to global service delivery. The providers that embrace the AI-powered, insight-led approach will shape the industry's future and position themselves as the preferred partners for enterprise transformation. The success of GCCs will depend on their ability to create value through AI-powered operations, making providers that enable this transformation as long-term strategic partners for global enterprises.

GCCs are evolving from cost-saving hubs into AI-driven innovation centers, enabling enterprises to enhance agility and digital transformation. Providers are expanding beyond traditional outsourcing by incorporating AI, analytics and automation to optimize GCCs. As AI-driven, autonomous GCCs emerge, providers must innovate to become strategic partners in the evolution of enterprises.

Provider Positioning

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	GCC Design and Setup	Optimization and Enhancement
Accenture	Leader	Leader
ANSR	Leader	Not In
Auxis	Contender	Contender
BCT	Contender	Contender
Capgemini	Leader	Leader
Coforge	Product Challenger	Product Challenger
Cognizant	Leader	Leader
Datamatics	Contender	Product Challenger
Deloitte	Leader	Leader
EY	Leader	Leader

Provider Positioning

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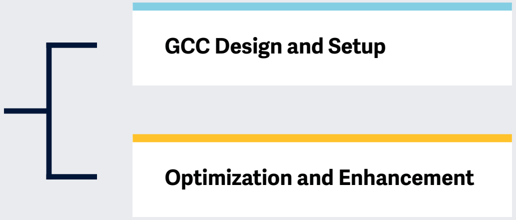
	GCC Design and Setup	Optimization and Enhancement
Firstsource	Market Challenger	Market Challenger
HCLTech	Leader	Leader
Hexaware	Market Challenger	Product Challenger
IBM	Leader	Leader
Infosys	Leader	Leader
KGiSL	Contender	Contender
KPMG	Leader	Leader
Opteamix	Contender	Contender
Persistent Systems	Rising Star ★	Rising Star ★
PwC	Product Challenger	Product Challenger

Provider Positioning

	GCC Design and Setup	Optimization and Enhancement
Randstad Digital	Product Challenger	Product Challenger
SLK Software	Contender	Contender
TCS	Leader	Leader
Tech Mahindra	Rising Star ★	Product Challenger
Torry Harris	Contender	Contender
Wipro	Product Challenger	Leader
YASH Technologies	Contender	Contender
ZS	Contender	Not In

The Global Capability Center (GCC) Services 2025 study focuses on **enabling enterprises** to **evaluate providers** in two focal areas.



Simplified Illustration Source: ISG 2025

Definition

The Global Capability Center (GCC) Services 2025 study focuses on the growing service provider ecosystem that helps establish and enhance GCCs. Over recent years, GCCs have emerged as critical components for businesses aiming to optimize processes and enhance operational efficiency. An increase in GCCs propelled their significance and stimulated an evolving partner landscape, fostering collaboration between enterprises and service providers. Service providers no longer view GCCs as competition but as opportunities to leverage their expertise and offer mutually beneficial services.

As organizations increasingly recognize the strategic advantages of GCCs, the role of service providers has become paramount. These providers assist businesses in determining whether setting up a GCC is the right strategy by evaluating business needs and future scalability. Their expertise extends to identifying optimal operating models that align with an enterprise's strategic goals and navigating the complex tax and regulatory landscape that governs international operations.

Beyond the setup phase, an equally robust segment of providers focuses on optimizing existing GCCs. Through process reengineering, benchmarking, digital transformation initiatives and others, they empower organizations to enhance efficiency and adapt swiftly to new technologies. Furthermore, these partners support staff augmentation and facilitate the development of new capabilities, ensuring that GCCs stay agile and competitive in a fast-changing environment.

The Global Capability Center (GCC) Services 2025 study aims to elucidate service providers' critical roles in establishing and optimizing GCCs, highlighting their impact on organizational success and the broader economic landscape.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following two quadrants for services: GCC Design and Setup, Optimization and Enhancement.

The ISG Provider Lens™ GCC study offers the following to business and strategic decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on the global services market.

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

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 (exceptionsare possible).

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 a 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.

GCC Design and Setup

This report is valuable for service 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. It evaluates the providers' capabilities in market analysis, business case development and operational model design while examining how they navigate regulatory compliance, risk management and talent acquisition complexities.

Strategic professionals

should read this report to gain an overview of service providers' capabilities in establishing GCCs, including assessing their viability as strategic models and steps for successful setup.

Procurement professionals

should read this report to gain insights into service offerings for GCC setup. This will allow them to make informed vendor selection and resource allocation decisions.

Compliance and legal professionals

should read this report to understand how providers tackle regulatory challenges and ensure alignment with local and international requirements during GCC setup.

Change management professionals

should read this report to understand strategies for managing change during GCC setup, ensuring smooth transitions and cultural integration within the organization.

This quadrant assesses service providers that support enterprises in **building** and **setting up** GCCs. It evaluates providers' expertise in **strategic advisory,** operational framework development and **scalability enablement** through **technology** and **talent.**

Gaurang Pagdi

Definition

This quadrant assesses providers that facilitate the setting up of GCCs. Providers act as consultants and advisors, helping enterprises identify if GCC is the right strategic model, create a detailed business case that justifies the investment and help identify the most suitable regions for operations. These providers also assist in operating model design to ensure alignment with business objectives while offering regulatory, legal compliance and tax consulting to navigate complex frameworks.

This quadrant also assesses providers that help with the operational GCC setup directly and/ or through their partner ecosystem. Providers also efficiently consolidate regional operations within the GCC and help build frameworks for the smooth functioning and scaling up of operations. They help with effective change management and prioritize cultural integration with the enterprise's core values, ensuring a robust foundation for operational success.

Eligibility Criteria

1. Has a **strong GCC advisory practice,** helping enterprises identify whether GCC is a suitable strategic option. Helps determine the **right location** based on the enterprise's strategic needs and offers a **competent talent pool**
2. Demonstrates a track record of successfully establishing GCC from **initial planning to complete operationalization**
3. Showcases expertise in **regulatory compliance, risk, legal and tax management**. Either has the capability or partner ecosystem that helps navigate regulatory environments and compliance with local laws and global standards during the setup and operation phases
4. Offers access to specialized **talent pools and staffing solutions.** Has established networks and partnerships to rapidly source and onboard skilled talent for GCC-specific functions
5. Demonstrates **case studies** of successful setups and **delivery of committed benefits** of setting up GCCs

Observations

The GCC design and setup landscape is evolving from a traditional cost-driven approach to a more strategic, innovation-led model. Organizations are no longer setting up GCCs solely for labor arbitrage; instead, they are prioritizing capability building, digital maturity and long-term scalability. This shift has led service providers to expand their roles beyond foundational setup support and offer holistic, future-ready solutions that integrate strategy, technology and talent.

The provider landscape is becoming increasingly diverse and dynamic. While established consulting firms continue to lead in strategic advisory, new entrants — including boutique consulting firms and technology-led service providers — are introducing agile, technology-enabled solutions that accelerate GCC setup. At the same time, providers are expanding their partner ecosystems, bringing together expertise in real estate, technology, compliance and talent management to deliver comprehensive end-to-end GCC enablement.

Several key trends are shaping this space:

- AI, cloud and automation are now integral to GCC setups, with organizations prioritizing built-in digital capabilities from day one.
- Governance and risk management have become critical, particularly as regulatory scrutiny intensifies in key markets.
- The focus on talent sustainability and workforce transformation has increased to ensure GCCs remain resilient against skill shortages and evolving business needs.
- The blurring lines between traditional outsourcing and GCC models are driving demand for providers that enable seamless transitions, digital acceleration and operational resilience.

From the 46 companies assessed for this study, 29 qualified for this quadrant, with 12 being Leaders and one a Rising Star.

accenture

Accenture stands out in GCC design and setup with its extensive scale, strategic partnerships and flexible operating models. Its ability to tailor GCC solutions across industries ensures that organizations achieve rapid scalability, efficiency and strategic alignment.

ANSR

ANSR has established itself as a key player in the GCC ecosystem by offering a holistic, future-ready approach to global expansion. With a strong mix of technology, expertise and strategic partnerships, it enables companies to scale efficiently while maintaining operational agility.

Capgemini

Capgemini's GCC design and setup approach integrates strategic advisory, flexible operating models and compliance expertise to ensure a seamless transition. By leveraging industry benchmarks, automation and scalable frameworks, the firm accelerates setup while ensuring long-term sustainability.

cognizant

Cognizant's GCC setup strategy offers customizable microservices, strategic consulting partnerships and flexible BOT models. It offers scalable solutions that can be rapidly deployed to meet enterprise transition needs.

Deloitte.

Deloitte's ability to integrate digital transformation with strategic business objectives enables GCCs to evolve beyond transactional roles, fostering innovation-led growth and sustainable competitive advantages.

EY's

EY's GCC setup approach combines strategic advisory with execution, assuring effective market entry and long-term viability. Its sector-specific expertise, compliance rigor and digital focus help firms achieve value from day one.

HCLTech provides end-to-end GCC setup, talent acquisition and digital transformation support, backed by over 70 engineering labs and a global delivery network. Its BOT and hybrid models enable enterprises to build resilient, future-ready operations.

IBM's well-defined approach to GCC design focuses on scalability, compliance and innovation. By integrating AI, automation and strategic consulting, IBM helps organizations establish future-ready, high-value capability centers.

Infosys adopts a structured approach to establishing GCCs, focusing on strategic location planning, regulatory compliance and technology-driven infrastructure. By leveraging market insights and automation, Infosys facilitates a seamless and scalable GCC launch.

KPMG's OneGCC model ensures a streamlined GCC setup by integrating location strategy, legal compliance, talent acquisition and technology enablement. Its structured service delivery framework enhances execution while minimizing risks and inefficiencies.

TCS helps establish GCCs with a future-ready foundation that integrates automation, AI and cloud from the outset. Its execution agility and deep industry expertise help create a scalable, compliant and high-performing GCC setup that aligns with business objectives.

Persistent Systems (Rising Star) takes a structured and innovation-driven approach to GCC setup, combining process rigor, automation and talent enablement. Its scalable and phased execution model ensures risk-free transitions and long-term operational success.

Tech Mahindra (Rising Star) offers a holistic GCC setup experience by seamlessly integrating infrastructure, digital transformation and talent incubation. Its strategic focus on new-age technologies and flexible engagement models enhances scalability and provides long-term value for enterprises.

Leader

"Owing to its global scale, partnership with ANSR and flexible models, Accenture excels in GCC setups that are scalable, efficient and strategically aligned."

Gaurang Pagdi

Accenture

Overview

Accenture is headquartered in Dublin, Ireland. It has more than 799,000 employees across over 200 cities in 49 countries. In FY24, the company generated $64.9 billion in revenue, with Consulting as its largest segment. A large team of dedicated talent for GCCs, global reach, partnership with ANSR and flexible operating models position Accenture as a leading GCC service provider. Its structured, technology-driven approach enables enterprises to establish and scale GCCs efficiently while aligning with strategic goals.

Strengths

Strategic partnership with ANSR: Through its partnership with ANSR, Accenture enhanced its GCC setup capabilities in infrastructure, location strategy and talent acquisition. ANSR's expertise in workforce planning and real estate complements Accenture's strengths in digital transformation and operational execution, facilitating a seamless and accelerated path to establishing a high-performing GCC.

Comprehensive GCC market leadership and investment: Accenture has invested over $250 million in scaling capabilities, building market awareness and enhancing technology assets. It employs a structured approach that includes a well-defined go-to-market (GTM) strategy and industry-specific solutions for GCCs. By leveraging its ecosystem partnerships, such as the one with ANSR, Accenture drives innovation and operational excellence, helping organizations design, establish and scale high-performing GCCs effectively.

Cross-industry expertise for scalable solutions: Accenture has extensive experience in establishing and operating GCCs across industries, which allows for a structured and scalable setup approach. As the operator of one of the largest GCCs, Accenture applies its firsthand governance, process optimization and technology integration knowledge to help organizations rapidly build and scale their GCCs with reduced risk.

Caution

Accenture's GCC expertise is robust, and its premium pricing structure is best suited for large enterprises. Organizations with budget constraints should evaluate cost-benefit alignment before engaging in its high-scale, transformation-driven approach.

Optimization and Enhancement

Who Should Read This Section

This report is valuable for service providers offering 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. The quadrant evaluates each provider’s ability to foster continuous improvement and operational excellence while helping organizations maximize GCC value through AI, analytics, automation, digital transformation and performance benchmarking.

Operations professionals

should read this report for insights into service providers’ capabilities in optimizing existing GCCs, facilitating process improvements and digital transformation.

Technology professionals

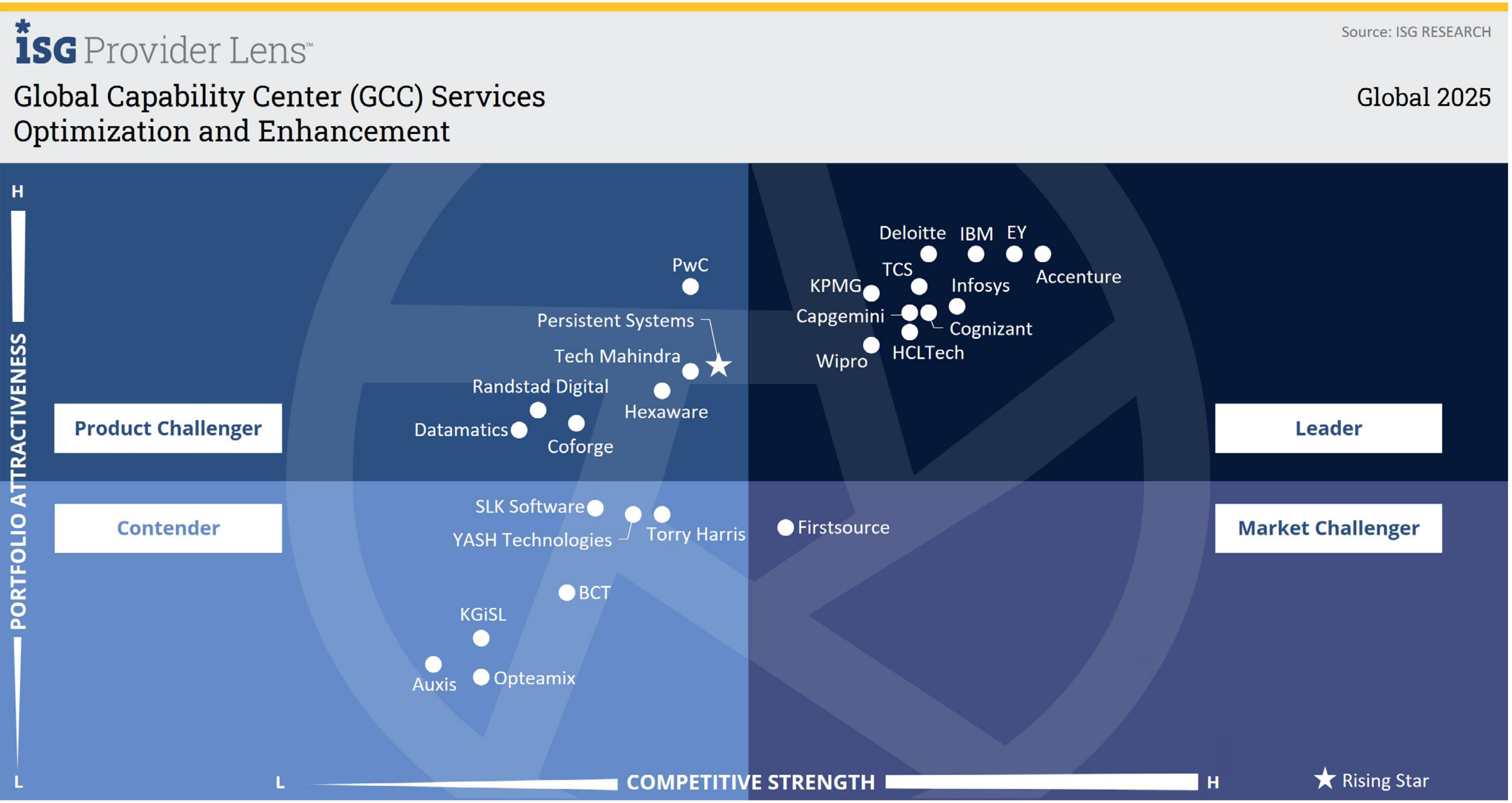
should read this report to explore providers’ insights and strategies for effectively leveraging automation and analytics to enhance the performance of GCCs.

Business professionals

should read this report to evaluate best practices from providers to maximize operational workflow efficiency and maintain competitiveness in a fast-paced market.

Data management professionals

should read this report to assess benchmarking practices and performance metrics that can improve GCC operations and ensure alignment with business objectives.



This quadrant assesses service providers that support GCC optimization and enhancement through their expertise in **process excellence, digital transformation** and driving **efficiency** through **automation, analytics** and talent **upskilling.**

Gaurang Pagdi

Definition

This quadrant assesses service providers that optimize and enhance GCCs using various approaches to drive operational excellence. They help organizations maximize the GCC's value by automating and streamlining processes while reducing manual effort. Providers adopt digital transformation initiatives to modernize legacy systems, integrate advanced analytics and enable data-driven decision-making.

Providers help build frameworks that foster a culture of constant improvement by embedding Lean, Six Sigma and design thinking, enhancing efficiency and service quality. They help drive innovation by introducing emerging technologies such as AI and ML.

Providers offer digital engineering capabilities to build robust platforms and scalable solutions, ensuring GCCs have the technological infrastructure to support complex operations. They help GCCs evolve to deliver significant value and align strategically with organizational goals while staying abreast of industry trends and changing business needs.

Eligibility Criteria

1. Has the ability to design, build and maintain robust **digital platforms and scalable technology solutions** to support complex and evolving GCC operations
2. Has a history of successfully managing **large-scale digital** and **process transformations** in diverse industries, showcasing adaptability and scalability
3. Offers expertise in guiding organizations through change while ensuring seamless adoption of **new technologies and processes**
4. Offers **tailored optimization strategies** that align with the unique business needs and strategic goals of the GCC
5. Demonstrates the ability to introduce and integrate **cutting-edge technologies,** such as AI, ML and cloud computing, into GCC operations to foster innovation
6. Provides end-to-end services for GCC **performance benchmarking** and **process reengineering** while implementing best practices across functions
7. Maintains a team of **diverse skilled professionals** to support GCC projects through **staff augmentation**

Observations

The GCC optimization and enhancement phase focuses on driving efficiency, resilience and strategic value beyond the initial setup. Organizations are moving away from transactional service delivery to higher-value functions. They are leveraging automation, AI and advanced analytics to enhance operational maturity. The focus is on process reengineering, intelligent workflows and stronger governance, ensuring GCCs evolve into key business enablers.

Unlike the setup phase, optimization requires continuous transformation. Many GCCs are embedding hyperautomation, predictive analytics and AI-driven decision-making to improve agility and reduce manual effort. At the same time, risk and compliance complexities are increasing, making strong governance frameworks essential.

Key trends include:

- AI-driven automation and process mining replacing traditional RPA for in-depth insights and efficiency
- Increased integration with global business functions, shifting GCCs beyond transactional roles
- Specialized talent models, emphasizing AI fluency and continuous upskilling
- Shift from cost savings to agility, resilience and business impact
- Providers developing modular transformation frameworks to accelerate GCC evolution

GCC optimization is no longer about incremental efficiency gains; it involves reshaping operations for long-term competitiveness. Providers with extensive process expertise, digital capabilities and strong governance models are critical to driving this transformation.

From the 46 companies assessed for this study, 26 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture supports GCC optimization through its AI-powered transformation platform, consulting expertise and global delivery network. By leveraging automation, analytics and continuous upskilling, it helps GCCs enhance efficiency, agility and strategic impact.

Capgemini

Capgemini's GCC optimization and enhancement approach focuses on improving process efficiency, automation and innovation to achieve cost savings and business value. By embedding AI, digital transformation and workforce upskilling, the firm enables GCCs to evolve into strategic growth engines.

cognizant

Cognizant transforms GCCs into innovation hubs, driving AI-led automation, industry-specific optimization and long-term scalability. Its continuous engagement model ensures sustained digital transformation and operational efficiency.

Deloitte.

Deloitte focuses on creating structured CoEs, ensuring that GCCs function as key drivers of efficiency, compliance and continuous process optimization across global enterprises, rather than merely serving as operational hubs.

EY

EY helps GCCs scale beyond traditional roles, enabling front-office operations and digital transformation. By integrating AI, automation and advanced governance, it ensures sustainable growth, efficiency and innovation in global operations.

HCLTech

HCLTech's strength in AI-driven automation, ESG integration and deep industry expertise enables GCCs to scale efficiently, while meeting sustainability goals. Its consultative approach and digital accelerators assure rapid transformation and significant business impact.

IBM's holistic optimization approach combines automation, cloud, cybersecurity and consulting expertise. Its transformation from traditional consulting to data-driven advisory enhances GCC efficiency and agility.

Infosys' optimization and enhancement solutions drive continuous improvements within GCCs through AI-led automation, workforce transformation and advanced analytics, enhancing operational resilience, efficiency and long-term business value.

KPMG enhances GCC efficiency through automation, analytics and governance frameworks. Its value tracking and change management expertise ensures continuous transformation, cost optimization and sustained operational excellence.

TCS drives continuous GCC improvement through AI-powered analytics, service excellence and cloud-enabled scalability. Its focus on innovation and governance ensures resilience, agility and long-term value creation.

Wipro demonstrates strong execution capabilities through automation, scalability and operational efficiency. Its AI-driven approach and global delivery model help organizations streamline processes and improve overall productivity.

Persistent Systems' (Rising Star) emphasis on automation, talent upskilling and continuous transformation enables enterprises to drive efficiency, scalability and innovation, ensuring their operations remain resilient and future-ready.

“Accenture enhances GCCs with AI-driven transformation, automation and global expertise, fostering efficiency, agility and strategic growth.”

Gaurang Pagdi

Leader

Accenture

Overview

Accenture is headquartered in Dublin, Ireland. It has more than 799,000 employees across over 200 cities in 49 countries. In FY24, the company generated $64.9 billion in revenue, with Consulting as its largest segment. Accenture drives GCC optimization through its AI-powered transformation platform, strong consulting expertise and global delivery network. Through automation, analytics and continuous upskilling, it enables GCCs to enhance efficiency, agility and innovation while evolving into high-value business hubs.

Strengths

Integrated GCC transformation platform: Accenture’s GCC platform optimizes operations through an integrated approach that combines strategy, business process transformation, application development and talent upskilling. With tools such as the Org Accelerator (IOA) for strategic alignment, SynOps for process transformation, GenWizard for application modernization and LearnVantage for rapid upskilling, Accenture ensures that GCCs operate efficiently and evolve with business needs.

Robust consulting expertise: Accenture, with its robust consulting background, has led large-scale digital and operational transformations across industries. Its expertise in process reengineering, automation and AI-driven optimization enables GCCs to evolve beyond transactional functions into value-generating hubs. Accenture’s structured frameworks and industry-specific best practices help enterprises navigate complexity and enhance efficiencies.

Global presence and delivery capabilities: With a vast global network of delivery centers and regional expertise, Accenture enables GCCs to operate seamlessly across markets, scale efficiently and remain aligned with local and global business needs. This presence enables organizations to leverage top capabilities, optimize costs and ensure regulatory compliance while maintaining flexibility in service delivery.

Caution

Accenture leverages a templatized methodology for scalability and efficiency. While effective, organizations with unique operational needs may require additional customization to align with specific industry nuances and strategic objectives.

Appendix

The ISG Provider Lens 2025 – 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 March 2025 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.

The study was divided into the following steps:

1. Definition of Global Capability Center (GCC) Services market
2. Use of questionnaire-based surveys of service providers/vendors 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 and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and 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

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

Bhuvaneshwari Mohan
Senior Research Analyst

Bhuvaneshwari is a Senior Research Analyst at ISG and is responsible for driving and co-authoring ISG Provider Lens™ studies on Digital Business Enablement, Supply Chain, ESG Services and Cybersecurity. She contributes to the research process with necessary data and market analysis, develops content from an enterprise perspective, and authors Global Summary reports. She comes with 8 years of hands-on experience and has delivered insightful custom reports across verticals.

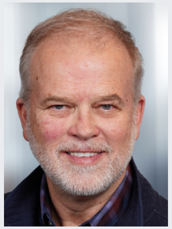
She is a versatile research professional having experience in Competitive Benchmarking, Social Media Analytics, and Talent Intelligence. Prior to ISG, she honed her research expertise in Sales Enablement roles with IT & Digital Services Providers and was predominantly part of Sales Enablement teams.

Study Sponser

Namratha Dharshan
Chief Business Leader

As a Chief Business Leader at ISG, Namratha Dharshan spearheads the BPO, AI and Analytics arm of the ISG Provider Lens™ program, contributing to more than 20 reports. Under the aegis of this program, where she heads a team of analysts, Namratha manages the delivery of research findings on service provider intelligence. As a part of her role in the Senior Leadership Council, Namratha is the designated representative of the ISG India Research team, comprising more than 100 dynamic research professionals. In addition, Namratha is a speaker in ISG's flagship quarterly call, ISG Index™.

As a principal industry analyst and thought leader, Namratha is well recognized for her contributions to service provider intelligence and her understanding of the customer experience landscape, particularly the area of contact center services.
She has also authored reports on other horizontal service lines such as finance and accounting and penned vertical focused reports for insurance.



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens/ISG Research

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.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

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

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ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

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™

MARCH, 2025

REPORT: GLOBAL CAPABILITY CENTER (GCC) SERVICES