

Global Capability Center (GCC) Services

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



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Introduction

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.

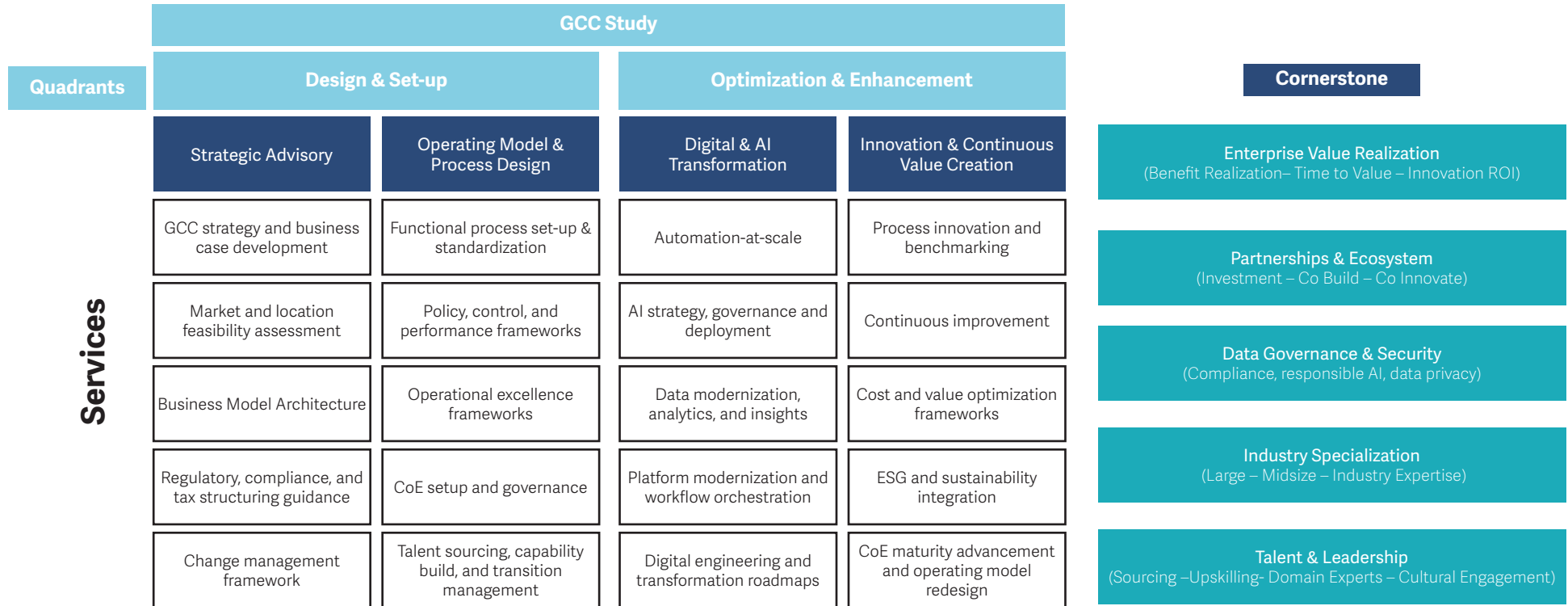
Service providers have progressed from supporting initial setup to acting as ecosystem orchestrators. Their scope includes advisory services on location and regulatory strategy, building modular and resilient operating models, delivering managed services and coinnovating industry-specific solutions.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

(CaaS), hybrid build-operate-transfer (BOT) structures and multihub 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.





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

Simplified Illustration Source: ISG 2025

Design and Setup

Optimization and Enhancement

Definition

The ISG Provider Lens® GCC 2026 study offers the following to business and IT 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.



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 multihub 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 multihub 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



Optimization and Enhancement

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



Quadrants by Region

As a part of this ISG Provider Lens® quadrant study, we are introducing the following two quadrants in the GCC Services 2026 report:

Quadrant	Global
Design and Setup	✓
Optimization and Enhancement	✓



The research phase falls in the period between October 2025 and March 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in March 2026.

Milestones	Beginning	End
Survey Launch	Monday, 27 October, 2025	
Survey Phase	Monday, 27 October, 2025	Friday, 28 November, 2025
Sneak Preview	Friday, 27 February, 2026	
Report Delivery	End of March	

Collecting client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens® 2025 research agenda.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created, or refer to the instructions in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyer’s Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Global Capability Center IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

ISG collects data for the purposes of conducting research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens® reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ — Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the Voice of the Customer concept. ISG has designed the Star of Excellence program to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts are continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

Our vision for the Star of Excellence is to become acknowledged as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement, please use the "Nominate (for Providers)" section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
star@cx.isg-one.com



ISG Star of Excellence



The ISG Provider Lens® March 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.

Study Sponsor:

Namratha Dharshan

Lead Author:

Gaurang Pagdi

Research Analyst:

Akshay S Hiremath

Data Analyst:

Sibasis Panigrahy

Project Manager:

Akshaya Hegde

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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 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.



Contacts For This Study

Study Sponsor



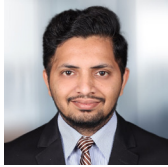
Namratha
Dharshan

**Chief Business
Leader, Global**



Gaurang
Pagdi

Lead Analyst, Global



Akshay S
Hiremath

**Senior Research
Analyst, Global**



Sibasis
Panigrahy

**Data Specialist,
Global**



Akshaya
Hegde

**Senior Project
Manager, Global**



ISG Provider Lens® Advisors Involvement Program

ISG Provider Lens® offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process. The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors for this study



Carolyn
Becker

Director



Mathew
Hannon

Account Director



Saurabh
Kapoor

Assistant Director



Michael
Fullwood

Partner

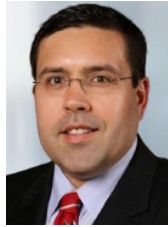


ISG Advisors to this study



Shriram
Natarajan

Director



Robert
Stapleton

Partner



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

Accenture*	Cognizant*	Happiest Minds Technologies	Mphasis
Aeries Technology	Cyient	HCLTech*	Ness Digital Engineering
Akkodis	Datamatics*	Hex Advisory Group	Nexdigm
ANSR*	Deloitte*	Hexaware*	NTT DATA
Atos	DXC Technology	Hitachi	Opteamix*
Auxis*	Infogain	Hitachi Digital Services	Persistent Systems*
Bain & Company	ITC Infotech	HTC Global	PwC*
BCG	eClerx	IBM*	Randstad Digital*
BCT*	EXL	Infosys*	SLK Software*
BDO	EY*	KGiSL*	SRKay Consulting Group
Birlasoft	Firstsource*	KPMG*	SRM Tech
Capgemini*	Fractal Analytics	Kyndryl	Sutherland
CGI	Galent	LAT91	TCS*
CMRIT Solutions	Genpact	LTIMindtree	Tech Mahindra*
Coforge*	Grant Thornton	McKinsey	Techwave



Invited Companies

Tholons
Torry Harris*
Trigent
UST Global
Valtech
Visionet Systems
Wipro*
WNS
YASH Technologies*
Zensar Technologies
ZS*
Zymr



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.

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](#).

iSG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

iSG

ISG (Information Services Group) (Nasdaq: III) is a leading 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.

For more information, visit isg-one.com.





OCTOBER, 2025

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