

Global Capability Center (GCC) Services

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



Introduction	3	Contacts for this Study	12
About the Study		Advisor Involvement	
Quadrants Research	5	Advisor Involvement - Program	
Definition	6	Description	13
Quadrants by Regions	8	Advisory Team	13
Schedule	9		
Client Feedback Nominations	10	Invited Companies	14
Methodology & Team	11	About our Company & Research	15

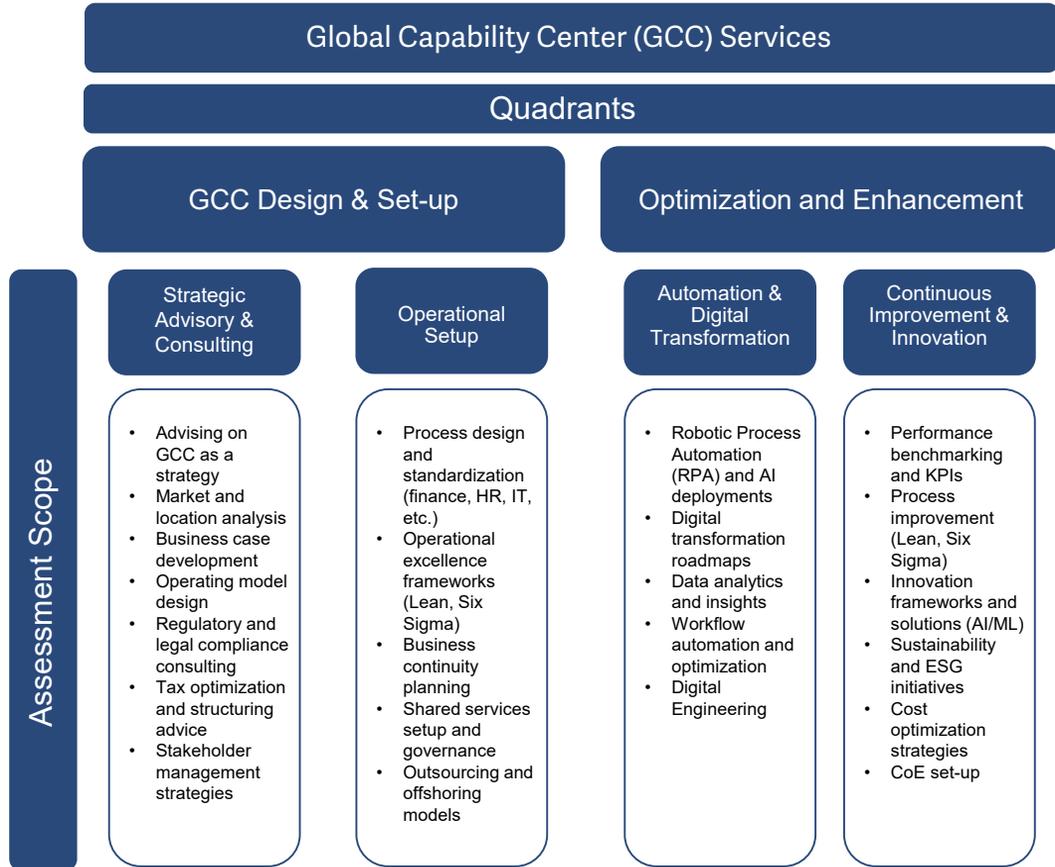
The Global Capability Center (GCC) Services 2025 study focuses on the growing service provider ecosystem that helps establish and enhance GCCs. Over recent years, GCCs have emerged as critical components for businesses aiming to optimize processes and enhance operational efficiency. An increase in GCCs 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.





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



Simplified Illustration Source: ISG 2024

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.



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



Optimization and Enhancement

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**



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following two quadrants on Global Capability Center (GCC) Services 2024:

Quadrant	Global
GCC Design and Setup	✓
Optimization and Enhancement	✓



The research phase falls in the period between October and December 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in March 2025.

Milestones	Beginning	End
Survey Launch	29 October 2024	
Survey Phase	30 October 2024	18 November 2024
Sneak Preview	January 2025	February 2025
Press Release & Publication	February 2025	

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 instructions provided 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 Buyers 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 Digital Engineering Services 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 2025. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

ISG collects data for the purposes of writing 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 concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, 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 will be 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 context of 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.

It is our vision that the Star of Excellence™ will be recognized 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 Client nomination 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:

ISG.star@isg-one.com



ISG Star of Excellence



Methodology & Team

The ISG Provider Lens – Global Capability Center (GCC) Services 2024 research 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:

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The research and analysis presented in this study will include data 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. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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



Contacts For This Study

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Gaurang
Pagdi
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Bhuvaneshwari
Mohan
Research Analyst



Sibasis
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Data Analyst



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Project Manager



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 advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures 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 QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT 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 to this study



Chuck
Walker

Partner



Matt
Shaheen

Director



Michael
Fullwood

Partner



Rajib
Datta

Partner



Robert
Stapleton

Partner



Shriram
Natarajan

Director



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	Genpact	SA Technologies
Aeries Technology	Grant Thornton	TCS
ANSR	Happiest Minds	Tech Mahindra
Auxis	HCLTech	Tholons
Bain & Company	Hexaware Technologies	Wipro
BCG	Hitachi Digital Services	WNS
BDO	IBM	Zensar Technologies
Birlasoft	Infosys	ZS
Capgemini	KPMG	
Cognizant	LTIMindtree	
Datamatics	McKinsey & Company	
Deloitte	Mphasis	
EXL	Nexdigm	
EY	Persistent Systems	
Firstsource	PwC	



***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](#).

***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 technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





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