AI-FIRST GCC INDEX 2026

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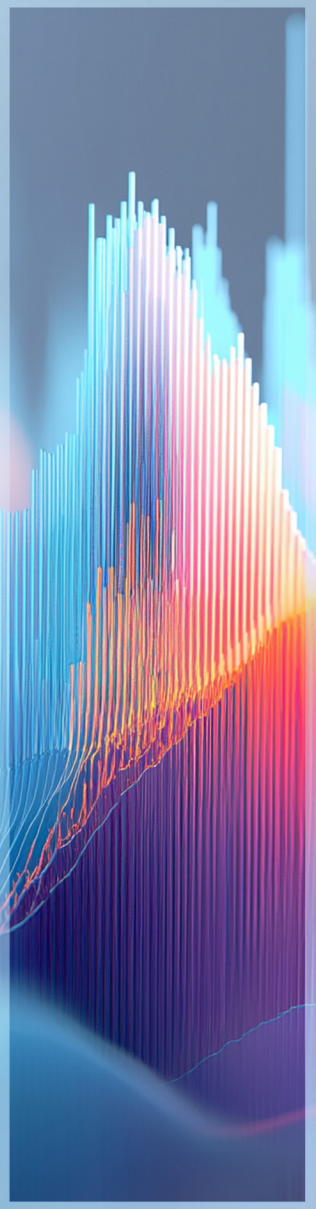
How Indian GCCs drive AI adoption and transformation



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VOLUME 1

Contents

01 Executive summary

Overview of the research, high level findings and the questions tackled by this report

The GCC transformation imperative

India's 1,700+ GCCs are at an inflection point. What began as cost optimization centers have evolved into strategic innovation engines driving enterprise transformation. Yet the path to AI-first excellence remains uneven.

Our comprehensive research, surveying 500 GCCs representing 29% of India's ecosystem, combined with in-depth executive interviews, reveals that while AI adoption is ubiquitous, meaningful business impact remains elusive for two-thirds of the industry.

499 of 500 surveyed Indian GCCs have deployed AI

75% of GCC functions are now AI-supported

31% of GCC processes enhanced by AI

27% report significant improvement from AI

71% of GCCs use generative AI across functions

19% of GCCs report directly to their parent's CEO

Key questions covered

What separates the 27% achieving significant AI-driven improvement from the majority?

Which organizational, process, and talent factors create measurable competitive advantage?

How can GCC leaders accelerate their AI transformation journey?

Research sample

Indian GCCs	**500**
Market coverage*	**29%**
Industry sectors	**12**
Executive Interviews	**10**

**Total ≈1,700 GCCs as per the Government of India, December 2025.*

02 Survey methodology and demographics

Research scope, statistical approach, and demographic landscape across our 500 Indian GCC respondents

Research scope and sample

Survey sample

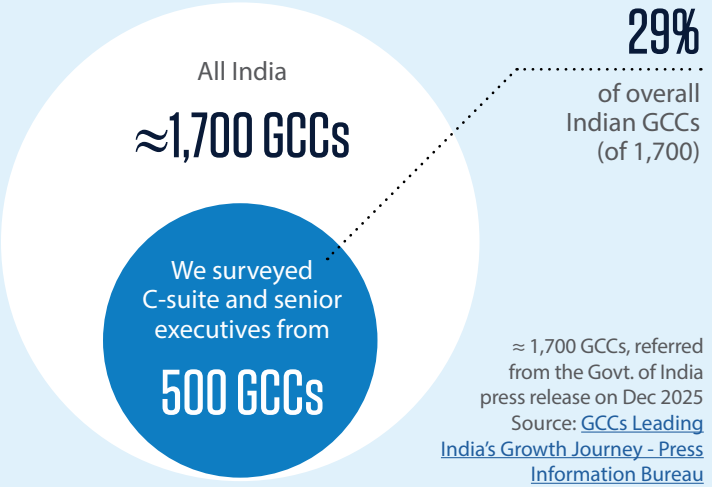
Total respondents	500
Coverage of Indian GCCs	29%
Industry sectors	12
Parent company countries	30

Data was gathered through a double-blind survey that was run from mid-January 2026 to mid-February 2026. The analysis employs logistic regressions to identify factors that link to GCCs reporting significant AI-driven outcomes, while controlling for background characteristics.

Respondent profile

C-suite/division heads	26%
Senior executives	74%

Sample distribution



≈ 1,700 GCCs, referred from the Govt. of India press release on Dec 2025
Source: GCCs Leading India's Growth Journey - Press Information Bureau

This report uses one of the largest samples of AI-first Indian GCCs to date. At a confidence interval of 95%, this sample of 500 from a population of 1,700 yields a maximum margin of error of 3.7%.

+/- 3.7%

Maximum margin of error

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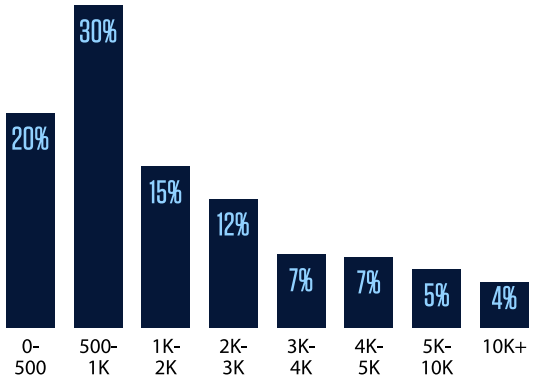
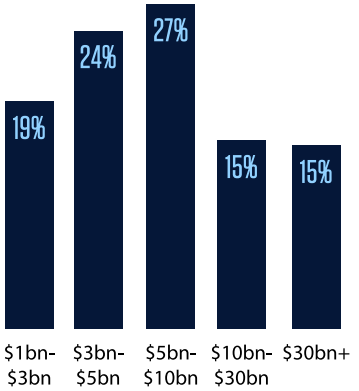
GCC size, structure, and services

Headcount distribution

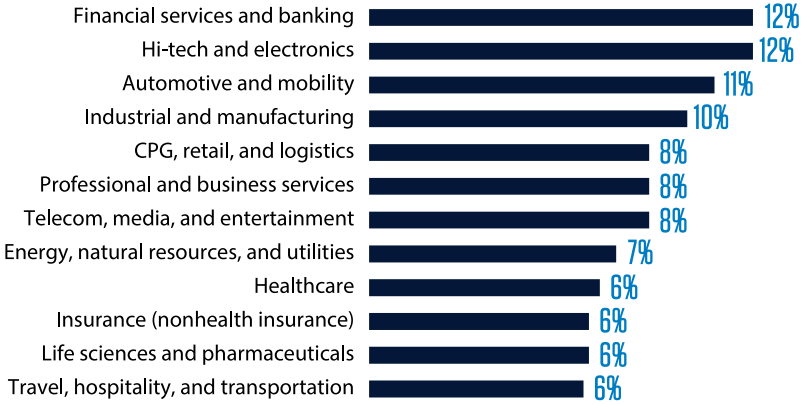


Parent company revenue

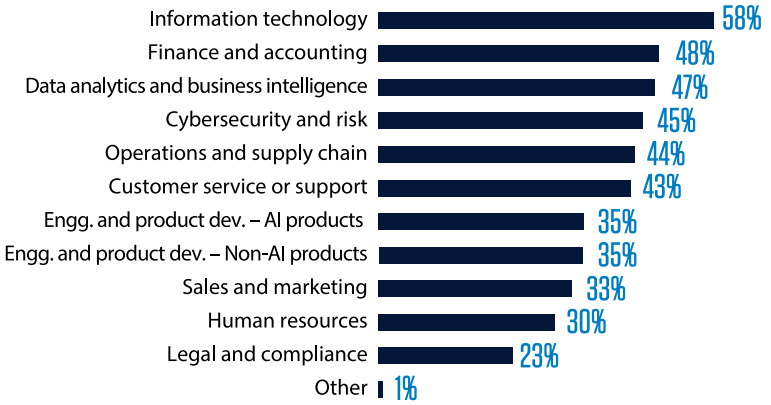


GCC reporting line

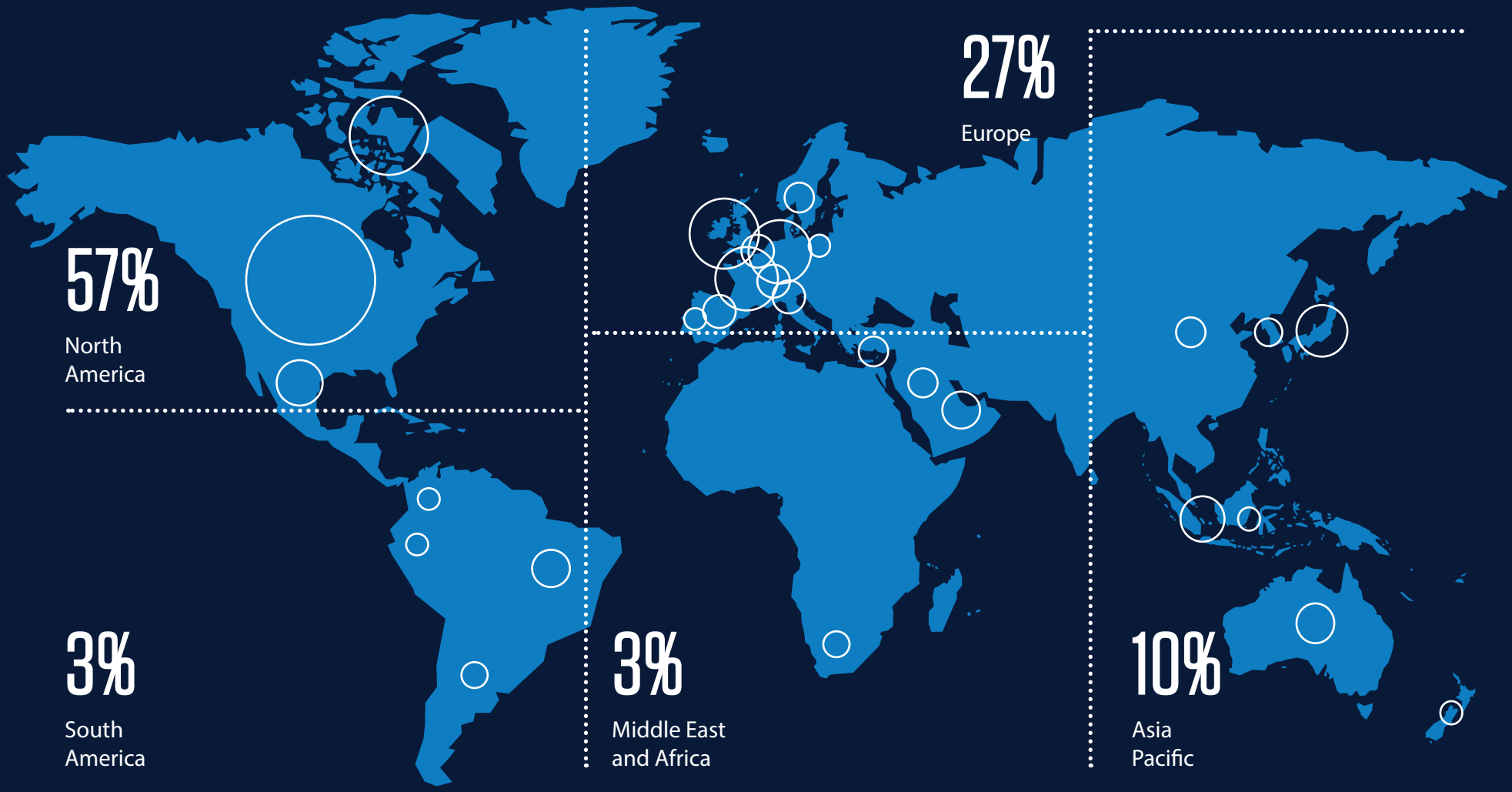
Parent industry sector



GCC functions delivered



GCC parent HQ location



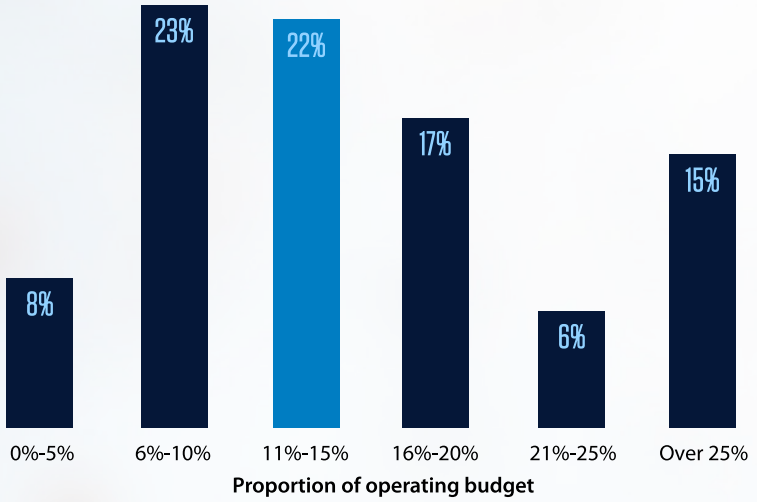
03 AI adoption patterns

AI spend, targeted outcomes, functions delivered, AI penetration, technologies used, and human integration

An investment in speed, quality, and innovation

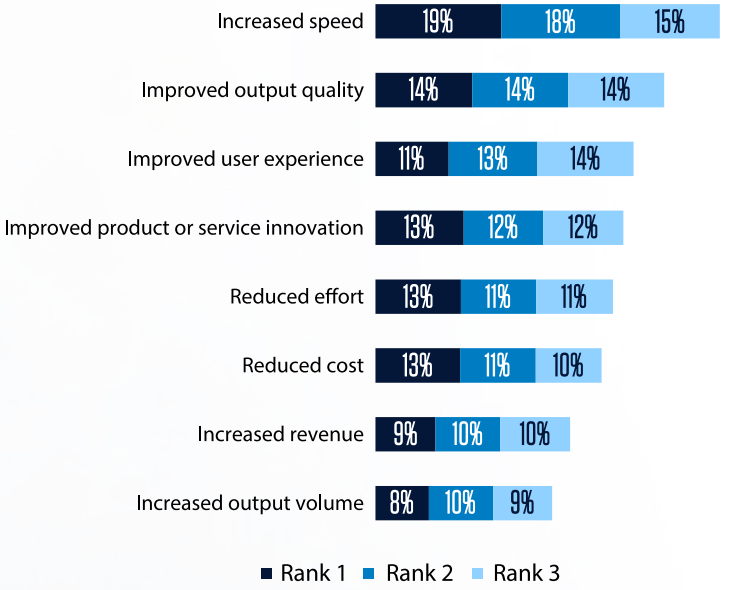
A typical GCC spends 15% of its operating budget on AI. The most common target for these investments is increasing speed, followed by improving the quality of outputs from processes. Improved user experience and product or service innovation are the next most common – though user experience is rarely the primary goal. Despite GCCs' traditional cost and volume focus, increased output volume and reduced cost are two of the least targeted outcomes. Though equally, it is also clear that few GCCs see AI as a revenue generating tool currently either.

GCC distribution by proportion of operating budget invested in AI



N = 500, where *N* is the number of respondents. Values do not total to 100 because about 7% of respondents selected "not sure" or "we do not pursue AI".

Top outcomes targeted from GCC AI investments

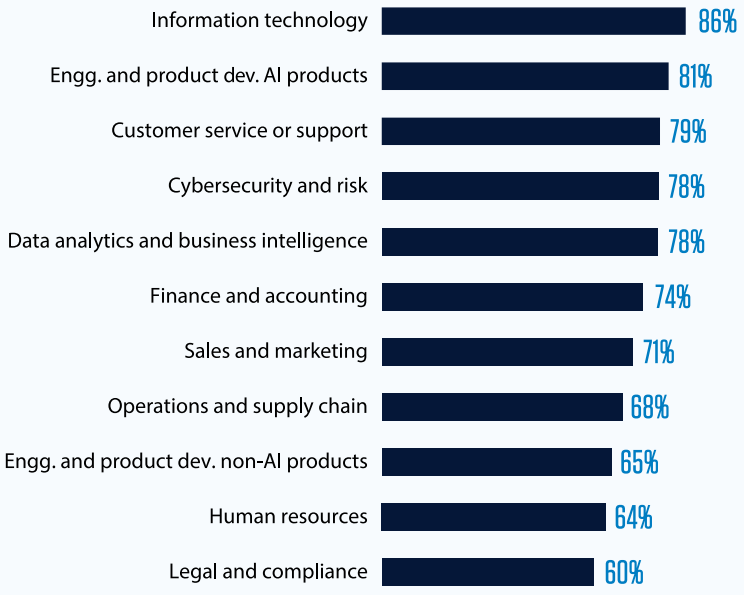


N = 499, where *N* is the number of respondents.

AI is everywhere in GCCs

AI is used by almost all GCCs. Only one GCC in our sample of 500 does not use AI today. More than three-quarters of GCCs use AI to support IT delivery, AI product engineering, customer service, cybersecurity, and data analytics. Generative AI dominates among tool types, with agentic AI also widely adopted, particularly in sales. However, predictive AI is the preferred choice for finance, analytics, and engineering.

AI adoption by function



N = 499, where *N* is the number of respondents.

Adoption of AI technologies

71% Generative AI

Most adoption in IT (84%), sales and marketing (76%), and AI product development (74%) functions

61% Predictive analytics/ machine learning

Strong usage in finance (70%), data analytics (72%), and engineering functions (66%)

57% AI embedded in software

Widely adopted across IT (66%), legal (62%), and HR (58%)

54% Agentic AI

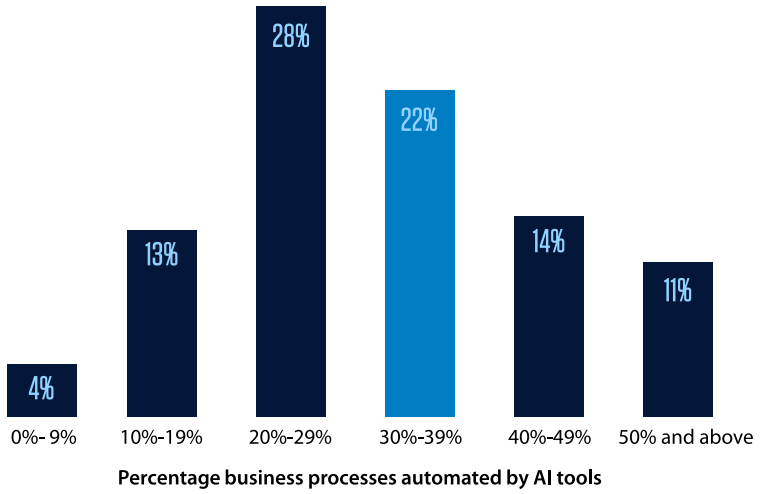
Highest adoption in sales and marketing (61%), customer service (58%), and engineering functions (58%)

Bigger and broader. GCCs use AI in between 70% and 80% of the functions they provide to their parents, regardless of the size of their operations. As such, large GCCs (>10,000 headcount) have more AI across more functions, delivering an average eight functions, with six of these typically being supported by AI.

The process automation opportunity

AI still enhances only a third of tasks. While all GCCs use AI in most areas, on average only 31% of tasks within a process are enhanced or automated. This is higher than in most enterprises, thanks to the business process focus that GCCs excel in. However, more can be done. Our analysis reveals that for every 10% increase in the proportion of tasks automated, there is a 5% improvement in AI outcomes cited by GCCs.

GCC distribution by percentage of business processes enhanced by AI



N = 500, where *N* is the number of respondents. Values do not total to 100 because about 9% respondents have selected "not sure" or "we do not use AI in our processes".

31%

Average proportion of tasks utilizing AI
Healthcare sector GCCs (39%) and those that report directly to the CFO or COO (33%) lead the way in percentage of tasks enhanced with AI automation.

45%

of GCCs use AI for less than 30% of tasks
The vast majority of GCCs have less than half their processes automated, indicating significant headroom for growth.

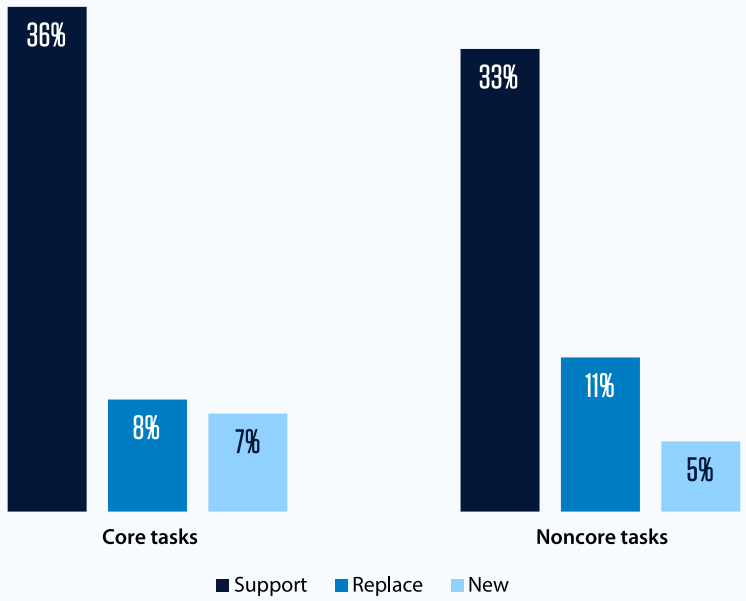
+5%

improvement per 10%
Increasing the proportion of tasks automated by 10% correlates with a 5% higher likelihood of significant improvement obtained from AI outcomes.

AI is mainly supporting employees

AI is used mainly to augment humans in GCCs. Almost 70% of AI deployments in GCCs are to support employees, whether they are active in core or noncore tasks. Only a fifth of AI deployments are used to replace human tasks, but more often in a noncore activity. In fact, it's almost as common to use AI for a net new core activity as it is to use it to replace an employee's tasks.

AI usage distribution



N = 499, where *N* is the number of respondents.

70%

Support employees
AI primarily supports employees in existing core and noncore tasks rather than replacing them. This collaborative approach is the dominant model across GCCs.

19%

Replace employees
A significant minority report AI replacing employees in some capacity, with sales and marketing (24%) and HR (26%) showing the highest replacement rates.

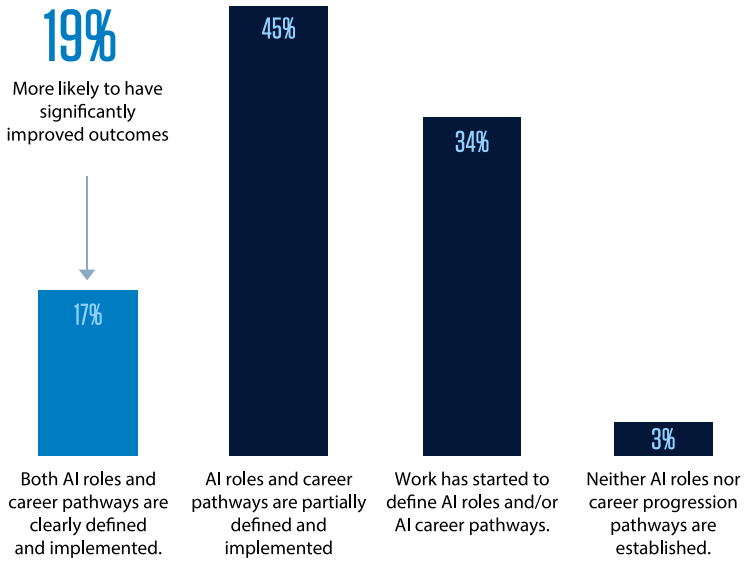
12%

Deliver new tasks
AI is enabling new capabilities, with data and analytics (26%) and AI product engineering (25%) leading in creating entirely new tasks and functions.

AI roles and career pathways

Defining AI careers and roles lifts performance. Most GCCs have only partially defined AI roles or clarified career pathways for employees who choose to engage with AI. Indeed, a third of GCCs have only just started to do this. While we find no evidence that not defining roles holds AI performance back, it is clear from our regressions that those GCCs that have defined roles and pathways can expect a significant improvement in AI outcomes.

GCC distribution by maturity of AI role and career pathway



N = 500, where *N* is the number of respondents. Values do not total to 100 because about 1% respondents have selected "not sure" or "not applicable".

+19%

More likely to improve

GCCs with clearly defined AI roles and career pathways are 19% more likely to have significantly improved outcomes from AI.

Financial services and healthcare

The highest levels of role and career definition are seen in these sectors, with 25% and 22% of GCCs, respectively, in this category.

Travel, hospitality, and transportation

Lowest level of role and career definition with only 11% of GCCs in these sectors having formalized AI skills pathways and development.

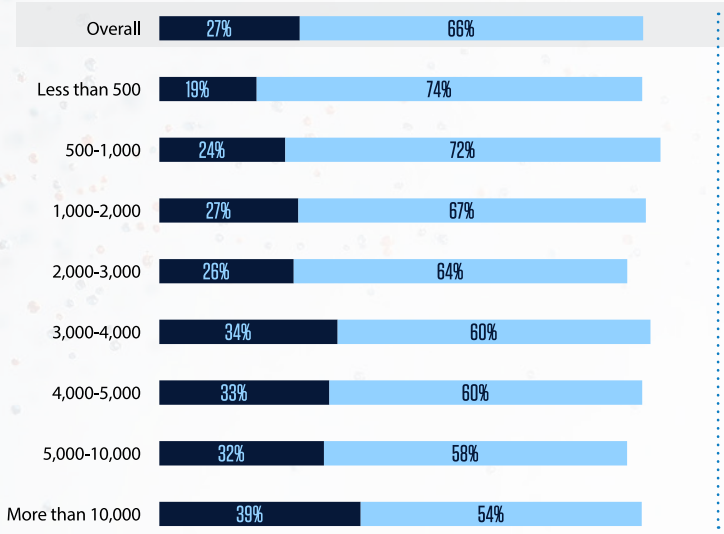
04 AI results

Where AI delivers the most improvements, by GCC size and industry

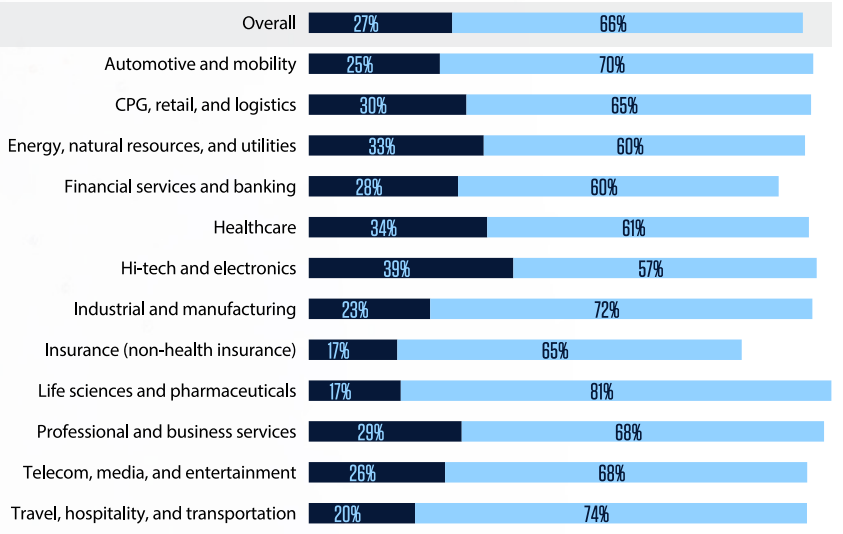
AI delivers significant benefits

And scale drives better AI outcomes. GCCs cite a high rate of AI success within their operations, with 27% describing "significant" improvements through their use of AI. But there is a clear scale advantage, with GCCs employing over 3,000 staff experiencing significant AI improvements a third of the time – and those with over 10,000 staff seeing this happen almost 40% of the time. Some industries also fare much better, notably hi-tech and electronics (39%), healthcare (34%), and energy, natural resources and utilities (33%) sectors.

AI impact by employee size



AI impact by parent industry



N = 1,650, where *N* is the number of observations made by 497 GCC respondents.
We excluded less than 1% of respondents who selected "not sure" on the AI impact.

05 Critical success factors

How process redesign, scale, leadership, responsible governance, development, partnerships and talent drive success

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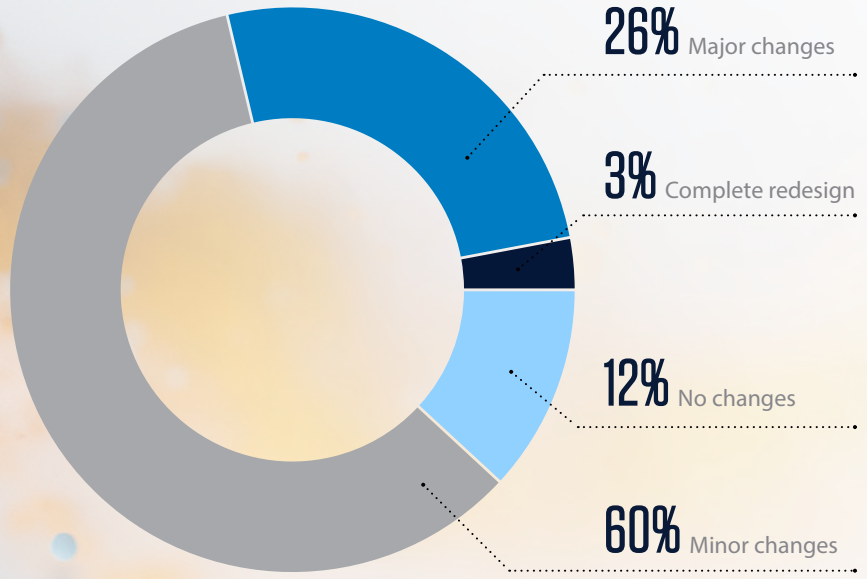
The AI transformation imperative

Big process change delivers better AI outcomes. GCCs that make only minor changes (or none at all) when implementing AI, miss significant benefits. Regression analysis reveals a strong link between process change and AI success.

Extent of process changes



N = 1,636, where *N* is the number of observations made by 497 GCC respondents.

+30%

More likely to improve
GCCs that completely changed existing processes when implementing AI are 30% more likely to have a significant improvement on outcomes.

COMPLETE REDESIGN = TRANSFORMATIVE RESULTS

+14%

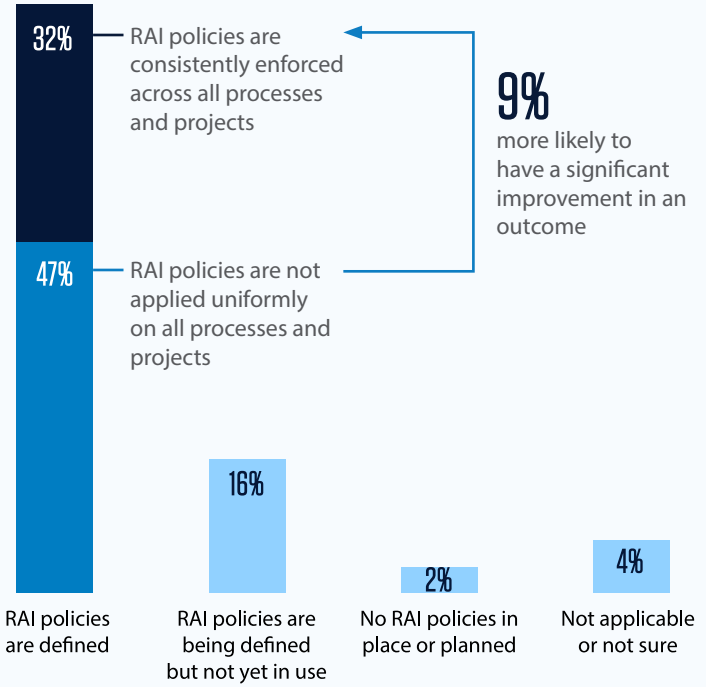
More likely to improve
GCCs that made major changes to existing processes are 14% more likely to see significant improvement compared to those making only minor changes.

MAJOR CHANGES = SIGNIFICANT GAINS

Responsible AI enforcement

RAI enforcement is often lacking. Almost 80% of GCCs have responsible AI (RAI) policies defined, but less than a third consistently enforce RAI across all processes and projects. Those that do can expect a 9% uplift in their likelihood to deliver significant improvements from AI.

RAI policy maturity by percentage of GCCs



N = 500, where *N* is the number of respondents.

The RAI paradox

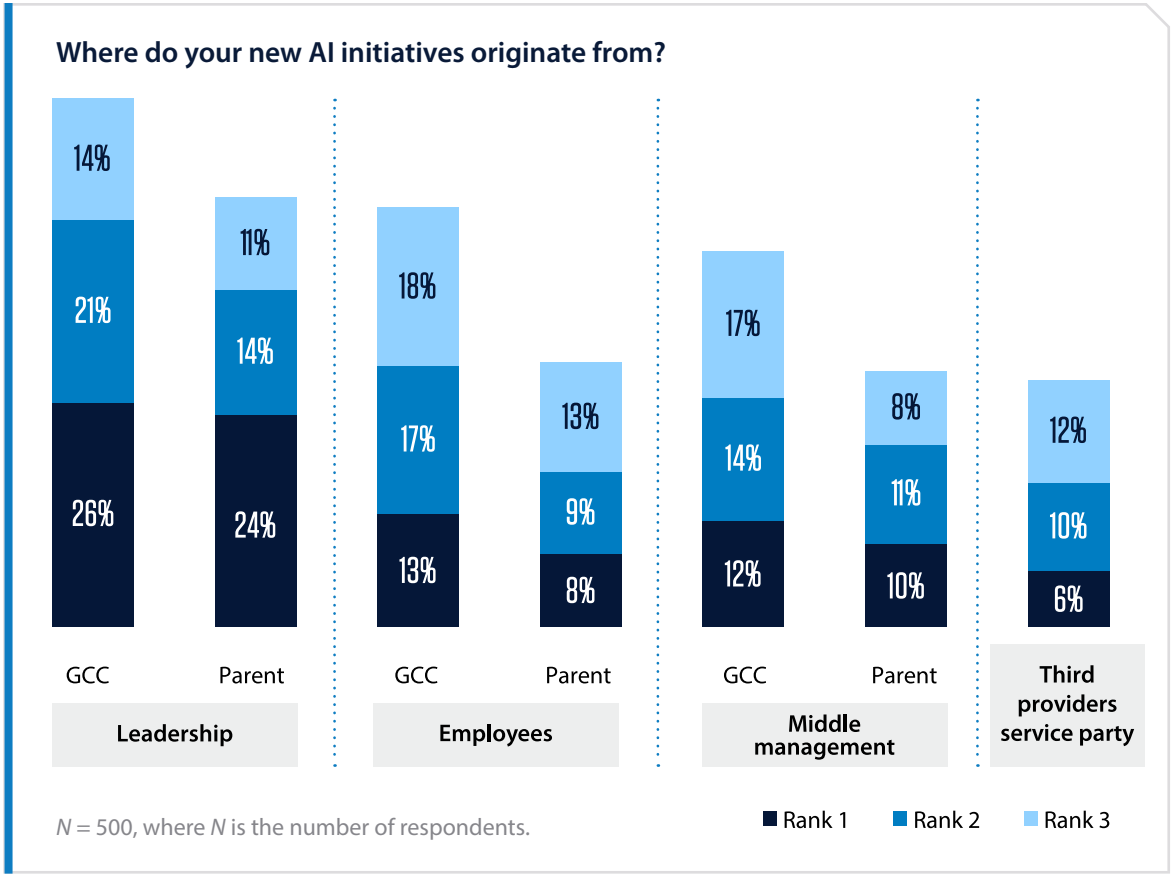
Completing the governance journey

The uncomfortable truth about AI governance is that research often reveals that those who do not exert any control over their AI deployments often achieve outcomes that are as good, or better than, those companies that have taken the more responsible path. This research is no exception, and we found that those few GCCs that had no RAI policies in place or planned had a 17% higher chance of significantly positive outcomes from AI.

Yet, only a fraction (2%) of GCCs exist in this bracket, and most have wisely begun their journey to deploying their RAI policies. The lesson is that they should complete these efforts and move to consistent enforcement rapidly to ensure they are banking the full return from their AI investments.

Taking the right lead

Proximity to strategic decisions accelerates AI. GCCs that report to CEOs, business unit heads, or CIOs are statistically more likely to achieve between a 5% and a 10% uplift in their AI outcomes as compared to those that report to the COO.



Leadership-driven

Better outcomes

GCCs that prioritize originating AI initiatives with parent company leadership are more likely (+5%) to see outcomes significantly improve compared to those prioritizing ideas from GCC leaders. GCCs that prioritize ideas from middle management are less likely (-4%) to see outcomes significantly improve. Leadership-driven initiatives show stronger results.

In-house AI development

Build applications not models. A quarter of GCCs are developing AI models and infrastructure in-house, whether for competitive or regulatory reasons. Yet our regression analysis reveals that there are only benefits to developing AI applications in-house.

Average in-house development for each AI layer

Application development
For every 10% of AI application development done in-house, there is a **1% higher likelihood** of having a significant improvement on an outcome with AI.

45%

Model creation
For every 10% of AI model creation done in-house, there is a **2% lower likelihood** of having a significant improvement on an outcome with AI.

28%

Infrastructure
Not enough evidence to support a link between the proportion of AI infrastructure developed in-house and the likelihood of having a significant improvement on an outcome with AI.

26%

N = 471, where *N* is the number of respondents.

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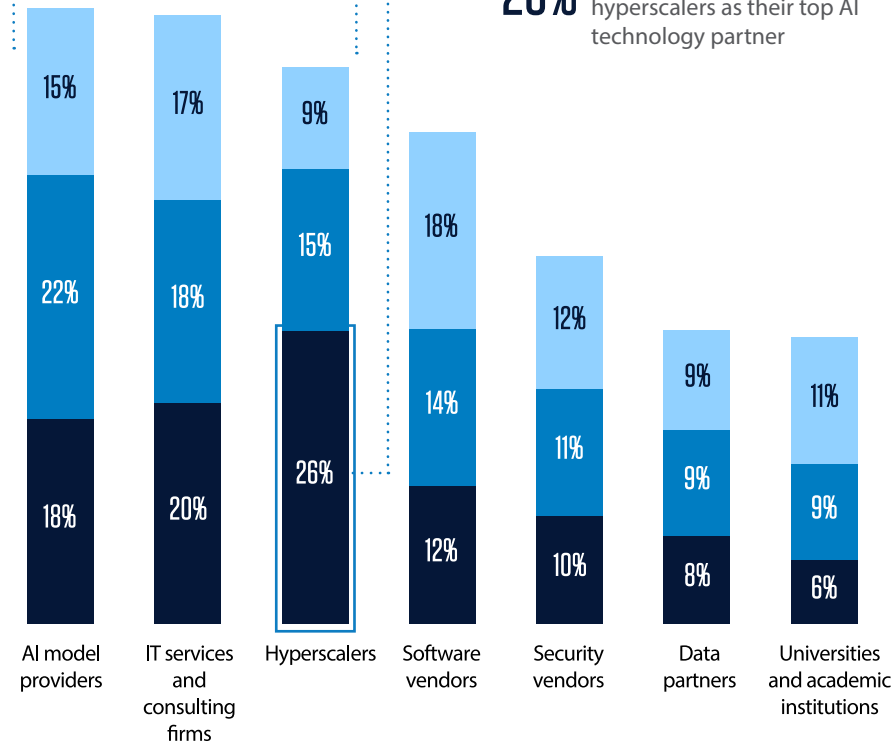
External partnerships drive AI success

Most frequently used AI partners

94% of the respondents ranked at least one of these three

26% of respondents ranked hyperscalers as their top AI technology partner



N = 495, where *N* is the number of respondents.

Rank 1 Rank 2 Rank 3

The partnership trinity

Our regression analysis shows that all partnerships deliver improved AI outcomes, and that almost all GCCs (95%) have partnered in some form. However, three types of partners stand out above the rest in terms of the amount of time they are selected among the top-three collaborators for AI at GCCs.

Hyperscalers

Cloud compute and storage providers such as AWS, Azure, and GCP are the first port of call as AI partners for a quarter of GCCs, but their power is unlocked in combination with model and services vendors

AI model providers

Model providers such as OpenAI or Anthropic provide the technical firepower and basis for AI innovation with GCCs. Yet they are more often the second partner a GCC looks toward.

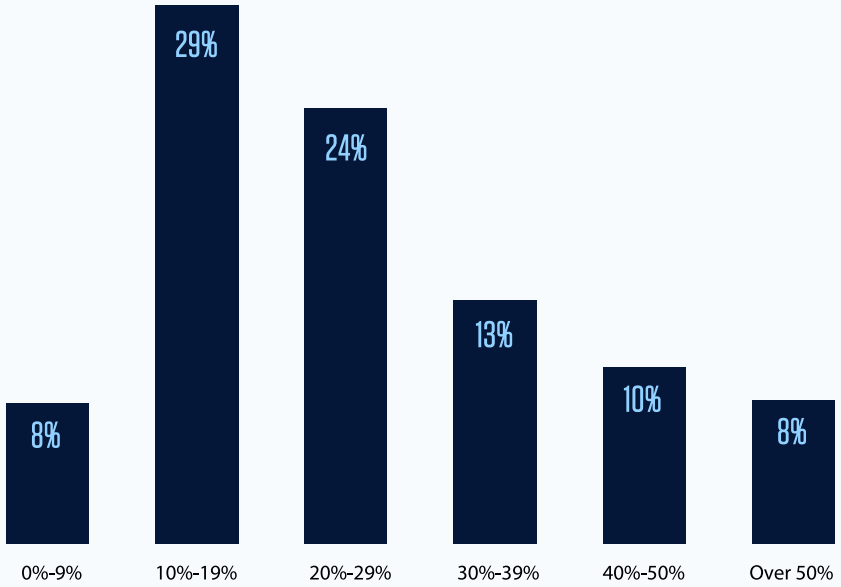
IT services firms

With domain knowledge, implementation and change management expertise, these firms bridge the gap between all other partners and form the backbone of the trinity of the top-three AI GCC partners.

AI talent and workforce

Not all talent sources are equal. Sourcing talent from academic institutions gives a 6% higher likelihood of significant improvement from AI, compared to internal transfers from the parent company, which tend to make it 5% less likely.

GCC distribution of workforce in AI



N = 500, where *N* is the number of respondents. Values do not total to 100 because about 9% respondents have selected "not sure" or "we do not use AI".

20%

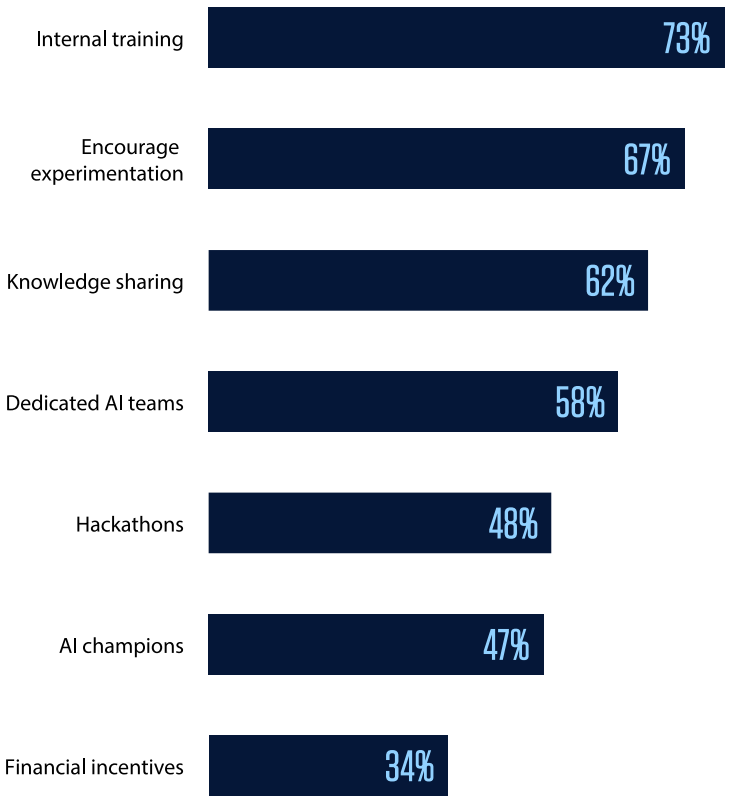
GCC workforce involved in AI deployment

One-fifth of GCC employees are involved in developing or deploying AI tools. However, there is no evidence that the percentage of workforce developing AI has any relation to the outcomes.

Talent sourcing approaches	% ranking as top-two sources
1 Training existing employees	45%
2 Direct local hiring	40%
3 Outsourcing to vendors	33%
4 Academic partnerships	28%
5 Global talent mobility	27%
6 Internal transfers from parent	26%

Fostering AI transformation

Initiatives implemented (last 12 months)



N = 496, where *N* is the number of respondents.

AI champions
+7% improvement

Appointing internal AI champions is the most effective initiative, increasing likelihood of significant improvement by 7%.

Dedicated AI teams
+5% improvement

Setting up dedicated AI innovation teams drives measurable outcomes.

Financial incentives
+4% improvement

Career and financial incentives motivate AI adoption.

Note: Internal training programs (73% adoption) and hackathons show no statistical link to outcomes, suggesting quality over quantity matters.

06 Summary and recommendations

Statistical insights and actionable recommendations for GCC leaders to drive AI-first outcomes

Key regression findings summary

+30%

Process redesign
Complete process redesign when implementing AI drives the highest improvement likelihood

+4%

Academic talent
Sourcing talent from academic institutions outperforms internal training.

+6%

CEO/CIO reporting
GCCs reporting to CEO, CIO, or BU heads outperform those reporting to COO.

+7%

AI champions
Appointing internal AI champions drives measurable improvement.

+18%

Defined AI roles
Clearly defined AI roles and career pathways significantly improve outcomes.

+5%

Process automation
Every 10% increase in automation correlates with 5% higher chance of significant AI improvements.

+5%

Dedicated AI teams
Setting up dedicated AI innovation teams improves outcomes.

Recommendations

1

Redesign processes fundamentally

Don't just layer AI on top of existing processes. Complete redesign delivers 30% improvement in AI outcomes.

Transform, don't automate

2

Define AI roles and career pathways

Clearly defined AI roles and career pathways increase improvement likelihood by 18%. Only 17% of GCCs have achieved this clarity.

Structure drives success

3

Leverage external partnerships

GCCs using external partners show dramatically better outcomes. Prioritize hyperscalers, AI model providers, and IT services firms.

Partner strategically

4

Source talent from academia

Academic partnerships outperform internal training by 4%. Build relationships with universities and academic institutions.

Fresh perspectives win

5

Enforce RAI

Go beyond defining RAI practices and ensure they are enforced consistently. Poor RAI application hurts outcomes.

Governance is key

6

Align with strategic leadership

GCCs reporting to CEO, CIO, or business unit heads are more likely to improve. An AI driven by the parent links to better outcomes.

Top-down support matters

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Contributors

Subject matter experts

Mitrankur Majumdar
Executive vice president, global head - Services | Dallas

Rajneesh Malviya
Executive vice president, service offering head - Financial services | Pune

Deval Shah
Vice president, GCC practice head | Bengaluru

Vishwanath Taware
Vice president, strategic technology group | Dallas

Padma Kumar
Associate vice president - GCC solutions head | Bengaluru

Shrirang Raddi
Associate vice president - GCC relationships head - Financial services | Pune

Biswa Prateem Das
GCC solutions architect | Bengaluru

Analysis and production

Samad Masood
Associate vice president, Infosys Knowledge Institute | London

Isaac LaBauve
Principal consultant, Infosys Knowledge Institute | Dallas

Dylan Cosper
Senior consultant, Infosys Knowledge Institute | Dallas

Pragya Rai
Senior consultant, Infosys Knowledge Institute | Bengaluru

Sandeep
Consultant, Infosys Knowledge Institute | Bengaluru

Pramath Kant
Consultant, Infosys Knowledge Institute | Bengaluru

Pranav Tekade
Analyst, Infosys Knowledge Institute | Bengaluru

For more information, contact askus@infosys.com

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