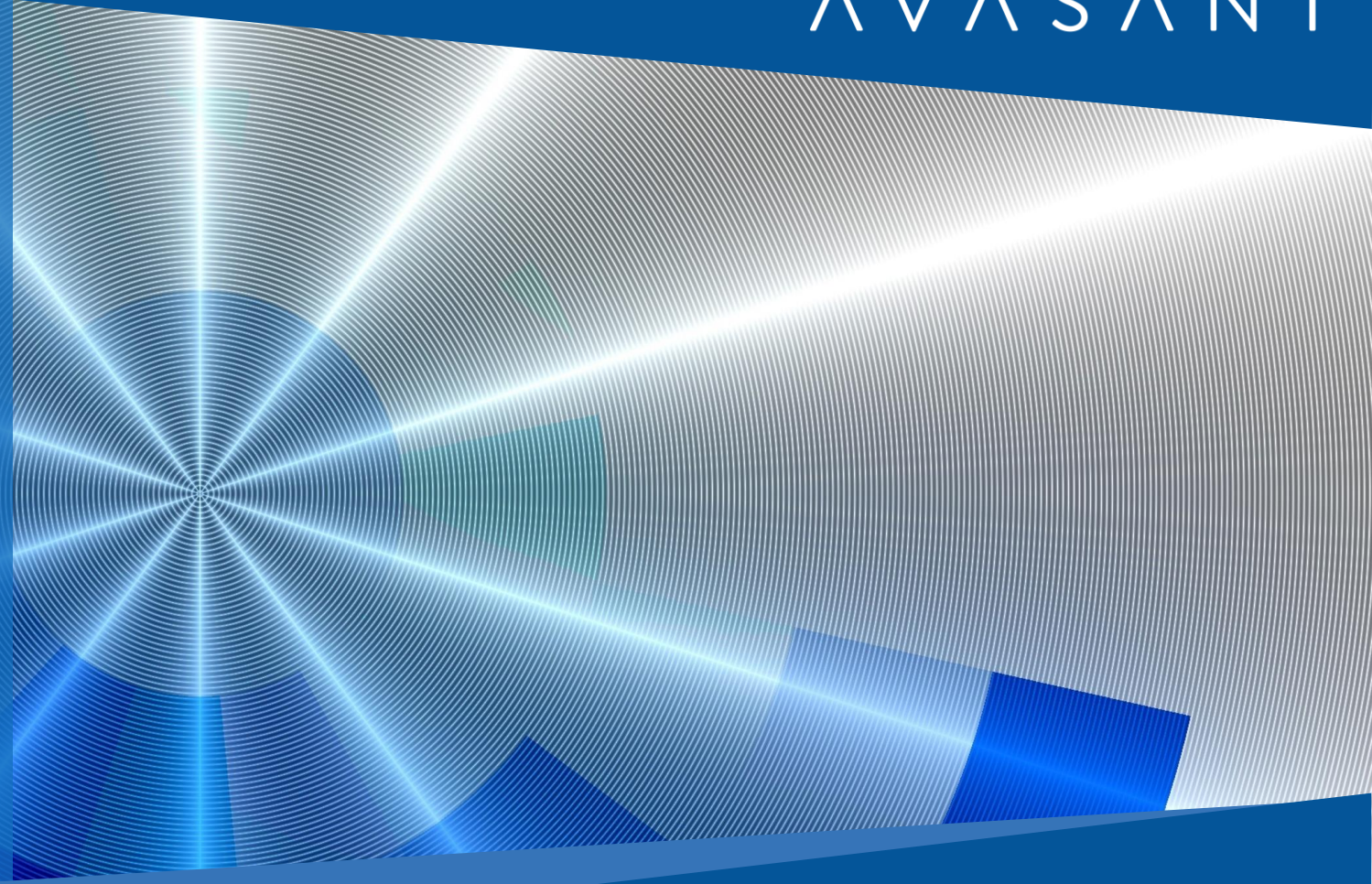# Global Competency Center (GCC) Services 2025 Market Insights™

Driving Enterprise Value Creation Through GCC Transformation

August 2025

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Key GCC trends shaping the market
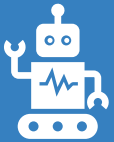
Global market trends

Growth & Untapped Potential
GCCs have grown by ~10% in last three years, yet significant untapped potential remains

Asset Monetization
Enterprises reposition mature GCCs for strategic asset monetization

Innovation Focus & Digital Shift
GCCs are shifting their focus towards innovation, moving beyond traditional cost benefits

Collaborative Ecosystem
GCCs and service providers' collaborations are increasing; it isn't a zero-sum game

Implications

- The GCC landscape has experienced consistent growth in new setups and expansions over the past three years, with ~18% increase in headcount.
- Currently, 400 out of the Forbes Global 2000 companies have established GCCs in India, indicating untapped headroom in the market, especially as enterprises recognize the value of GCCs for innovation.

- As GCCs mature, they become more valuable to their parent firms. However, if they only focus on streamlining costs and achieving operational goals, they might be seen as assets to be monetized.
- Consequently, GCC leaders are focusing on becoming multi-function, owning core processes, and increasing focus on driving enterprise wide innovation and transformation.

- A clear trend shows that GCCs are heavily investing in innovation, with 52% of job openings in the top 20 mature GCCs now requiring innovation skills. This is a higher demand than for standard process roles.
- The focus on innovation is further underscored by the fact that over half of GCCs (51.5% combined) are now concentrating on digital (24.3%) and ER&D (27.2%) capabilities, with a particular rise in demand for AI/ML roles, reflecting their evolution into innovation hubs.
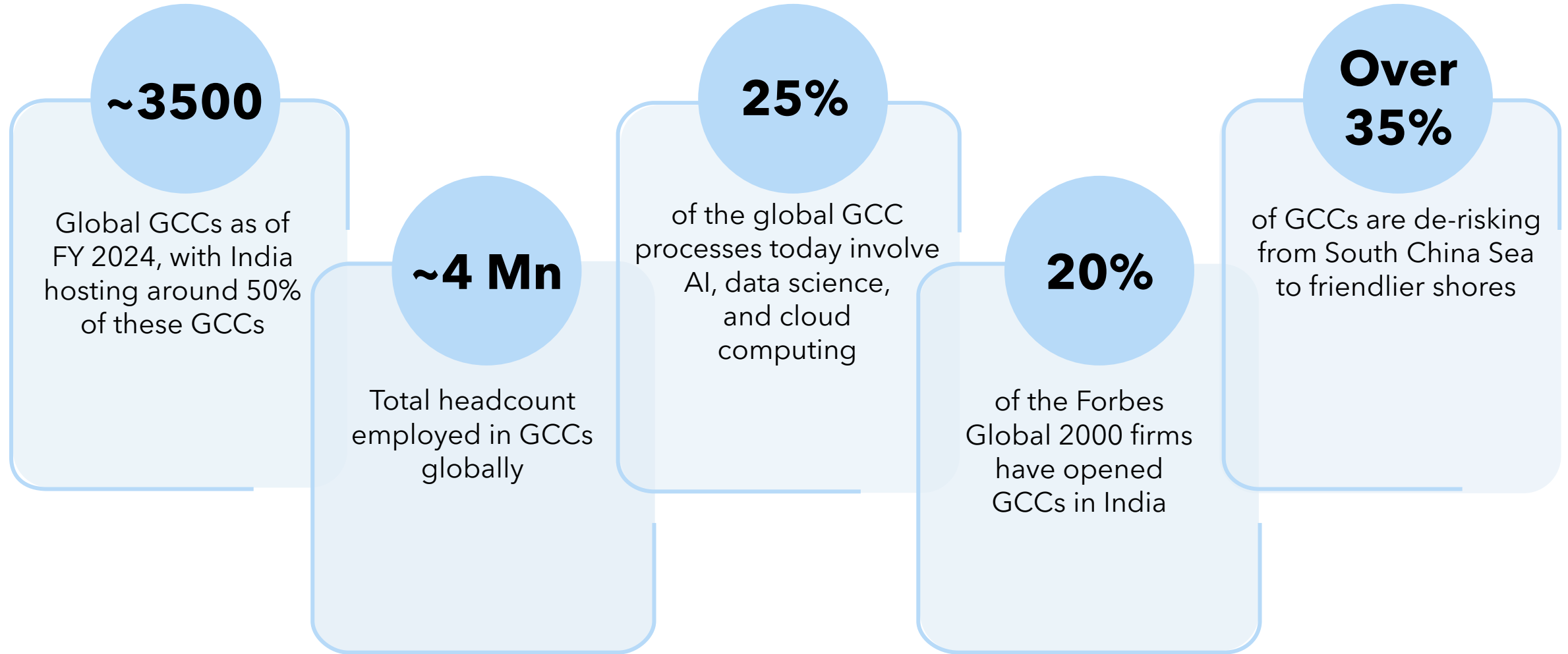
- GCCs are increasingly partnering with service providers for specialized skills and advanced tech such as AI/ML and cloud, accelerating their innovation without heavy in-house investment.
- Collaboration enables GCCs to quickly scale operations up or down, while providers gain stable partnerships.

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Enterprises across the world are leveraging Global Competency Centers (GCCs) to scale smarter, innovate faster, and grow stronger

~3500

Global GCCs as of FY 2024, with India hosting around 50% of these GCCs

~4 Mn

Total headcount employed in GCCs globally

25%

of the global GCC processes today involve AI, data science, and cloud computing

20%

of the Forbes Global 2000 firms have opened GCCs in India

Over 35%

of GCCs are de-risking from South China Sea to friendlier shores

Source: Avasant Research, Avasant GCC Intelligence Platform
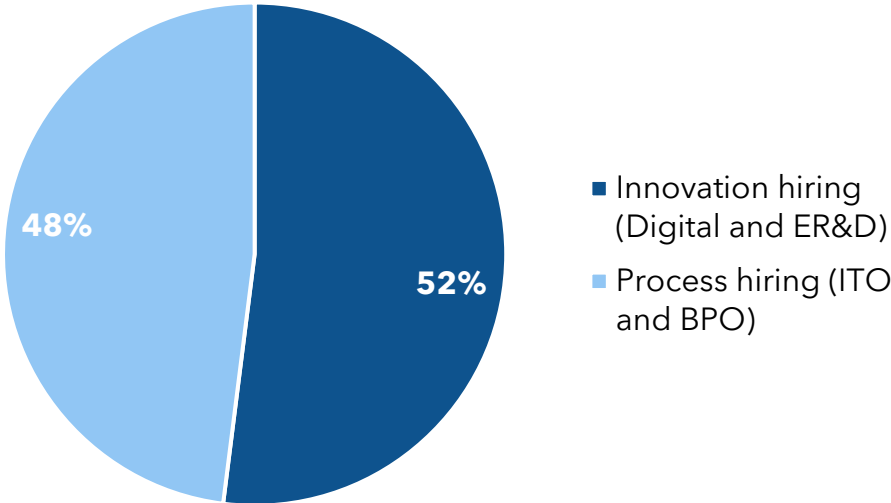
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To align with the new innovation imperative, GCCs are expanding their talent pools by actively hiring for dedicated innovation roles

Mature GCCs are increasing their focus on innovation

	Cost & Efficiency	Process & Talent	Innovation
Greenfield setup	46%	33%	21%
Brownfield (0 – 2 years) - Young GCCs	34%	39%	27%
Brownfield (2-7 years) - Growing GCCs	31%	47%	22%
Brownfield (7+ years) - Mature GCCs	21%	38%	41%

Note: These percentages indicate the primary focus areas for GCCs at different stages of their maturity.

Distribution of hiring at the top 20 Mature GCCs

48% 52%

■ Innovation hiring (Digital and ER&D)
■ Process hiring (ITO and BPO)

Note: This chart illustrates the distribution of hiring priorities within the top 20 Mature GCCs

Source: GCC and Parent Executive interviews, GCC Career portals

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Infosys: RadarView profile

Practice maturity ★★★★★

Partner ecosystem ★★★★

Investments & innovation ★★★★

Leverages AI, cloud, automation, and strong partnerships to drive end-to-end innovation and digital transformation in GCCs.

Practice overview
- Practice size: N/A
- Active clients: N/A
- Delivery highlights: Around 47 delivery centers across Asia, North and South America, Australia, and Europe

32+	~3.3%
BPM global delivery centers, FY 2024	Overall revenue growth rate, FY 2024

Client case studies
- Established a global competency center (GCC) in Bengaluru for the Lufthansa Group in 2025, enhancing software development and aviation products. By leveraging Infosys Topaz and Cobalt Airline Cloud, the center advances AI-powered innovation and sustainable aviation IT solutions.
- Assisted Rolls-Royce in establishing an aerospace engineering and digital innovation center in Bengaluru. This GCC enhances R&D, drives technological advancements, and optimizes engineering services by leveraging Infosys' expertise in digital transformation.
- Supported Zooplus in establishing a GCC in Hyderabad. By leveraging Infosys Topaz and its advanced data capabilities, this center enhances AI-driven innovation and optimizes Zooplus' marketing, e-commerce operations, supply chain, and order management capabilities.
- Supported a US-based life insurance company's GCC by implementing a BOT* model, transitioning over 40 processes, and transferring over 200 employees. The automation solutions saved manual efforts, resulting in annual cost savings of $248K and a 55% increase in productivity.

Key IP and assets
- Topaz: An AI-driven service offering to boost efficiency, human potential, and value
- Cobalt: A cloud-powered suite enabling AI, automation, security, and digital transformation for enterprises
- Finacle: A banking software suite enabling digital transformation, innovation, and enhanced customer experiences

Key partnerships

Sample clients
- Lufthansa Group
- Rolls-Royce
- Zooplus
- A US-based life insurance company
- VISA
- Daimler
- A US-based global bank
- A global investment bank

Value Chain Coverage

| Strategy and Design |
| Build |
| Transition |
| Operate |
| Scale and Transform |
| Digitalization |

Darker color indicates higher industry concentration: ○○○●

*BOT: Build-operate-transfer

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Infosys: RadarView profile

Analyst insights

Practice maturity	★★★★★

- Infosys offers end-to-end GCC services across various industries, including retail, life sciences, aerospace and defense, and manufacturing. Its service offerings span processes such as digital transformation, AI/ML, cybersecurity, IT infrastructure, and cloud solutions, delivered from delivery centers across Asia, the North and South Americas, the Middle East, and Europe.
- It is enhancing its GCC capabilities with Infosys Cobalt and Infosys Topaz, driving digital transformation in the aviation industry. By leveraging AI readiness and industry cloud solutions, Infosys' Cobalt Airline Cloud has helped leading players in the aviation industry, such as Lufthansa Group, optimize operations, enhance customer experiences, and enable sustainable, efficient air travel.
- Infosys' business process management (BPM) tools from EdgeVerve, including AssistEdge for intelligent automation and TradeEdge for supply chain optimization, have strengthened its GCC offerings by enhancing operational efficiency, AI-driven decision-making, and end-to-end process transformation. These intellectual property (IP) assets empower GCCs to streamline workflows, reduce costs, and accelerate digital innovation across industries.

Partner ecosystem	★★★★

- Infosys has collaborated with IBM to launch an AI and automation center in Łódź, Poland, strengthening its GCC capabilities in Europe. This move enhances AI-driven automation and accelerates Infosys' hybrid cloud solutions adoption, highlighting its commitment to innovation and talent development in the region.
- Infosys Foundation has partnered with the Indian National Academy of Engineering through a $380 million initiative to upskill educators and provide engineering students with internships and mentorships, enhancing talent acquisition for its GCC offerings.
- It has expanded its GCC offerings by partnering with select startups through the Infosys Innovation Network, providing clients with innovative, enterprise-ready solutions. By integrating cutting-edge technologies into its GCC services, Infosys enhances the value it delivers to clients.

Investments and innovation	★★★★

- In 2023, Infosys acquired Danske Bank's IT center in India to accelerate its digital transformation and enhance customer-facing digital solutions. This acquisition has strengthened Infosys' GCC service offerings by expanding its BFSI capabilities and strengthening its presence in the Nordic region.
- Infosys acquired GuideVision to enhance its GCC service capabilities by improving its ServiceNow expertise, expanding cloud offerings through Infosys Cobalt, and utilizing nearshore delivery centers across Europe.
- It has expanded its GCC offerings in aerospace and defense by investing in an aerospace and digital innovation center. This has enhanced its engineering, R&D, and digital capabilities, enabling advanced innovation and operational optimization in the sector.

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