

GCC PULSE™

GCC Trends 2026

The Shifting Architecture of Global Capability Centers

A curated synthesis of viewpoints from global technology firms, boutique advisory specialists, and independent research organizations driving the next phase of Global Capability Centers.

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Executive Overview

Global Capability Centers enter 2026 at a moment of structural transition. What began as a scale-and-efficiency construct has matured into something far more consequential: globally integrated operating units with ownership of products, platforms, data, and enterprise outcomes.

Contributors across the enablement ecosystem point to a clear rebalancing of expectations. Enterprises are no longer asking what GCCs can execute; they are increasingly asking what GCCs can own. This shift is evident in **operating models, leadership mandates, talent architecture**, and the way success is measured.

Three signals recur across perspectives:

- GCCs are being designed for **ownership and accountability**, not delegated execution.
- Value creation is anchored in **product thinking, AI-led decision-making, and domain depth**, rather than workforce scale.
- India is evolving into a **strategic control plane** for global enterprises, not merely a delivery geography.

This report distills these perspectives into a set of themes that define how GCCs will operate, govern, and differentiate themselves in 2026 and beyond.

A Note for Service Providers

As GCCs evolve along different maturity paths, service providers are being evaluated less on scale or breadth and more on contextual alignment. Contributors indicate that the most effective partners are those who can flex their engagement models—moving seamlessly from operational rigor to strategic contribution—based on where a GCC sits in its evolution. The ability to co-create, rather than simply deliver, is emerging as a defining differentiator in the GCC ecosystem.

> *GCCs are at different stages of maturity, and a one-size-fits-all approach no longer works. Service providers that position themselves as partners, aligned to each GCC's objectives, collaborate from operational excellence to innovation and co-creation, are the ones that create lasting impact.*



Kiran Cherukuri, Executive Vice President & Global Head – GCC Practice

HCLTech

Contributors & Perspective Framework

This report draws on perspectives from practitioners and advisors operating at the intersection of enterprise strategy, technology, talent, and governance. Together, they offer a ringside view into how Global Capability Centers are being designed, scaled, and repositioned within multinational companies.

Their perspectives reflect three core lenses that shaped the questionnaire and analysis:

Market Direction and Trends

How the GCC construct itself is evolving—its role, mandate, and position within global enterprises.

Functional and Talent Shifts

Where ownership is moving across functions, and how workforce models, leadership expectations, and skills architectures are being redefined.

Predictions and Early Signals

Forward-looking observations and early indicators that point to how 2026 is likely to unfold.

Contributors



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We thank all contributors for sharing candid insights drawn from ongoing work with global enterprises, advisory engagements, and research-led analysis. Their inputs form the foundation of this report.

Methodology : *This report is based on a curated questionnaire shared with a select group of senior leaders across the GCC enablement ecosystem. Contributors were chosen for their direct, ongoing involvement in advising, building, and researching Global Capability Centers, rather than through a broad-based survey. The intent was depth over volume—capturing informed perspectives and early signals from those with a close vantage point on enterprise decision-making. Insights reflect qualitative judgment, pattern recognition, and market-facing experience.*

The Direction of Travel: From Centers to Global Offices

Across contributor perspectives, there is a consistent view that the traditional framing of GCCs is no longer sufficient. Contributors indicate that GCCs are being **repositioned from peripheral delivery units into globally integrated offices** with shared authority and accountability.

Rather than acting as downstream executors of headquarters-defined agendas, contributors observe that leading GCCs are increasingly involved in shaping enterprise priorities, product roadmaps, and operating decisions.

This direction of travel is characterized by:

- **Global integration over separation,** with GCC leaders embedded into enterprise governance structures.
- **Clear ownership of enterprise-critical work,** spanning product platforms, data governance, risk, and compliance.
- **Sharper mandates,** with newer GCCs launching smaller but with tightly defined charters and decision rights.

> *2026 will be the year GCCs stop acting like extensions and start functioning as global offices in their own right. With the rise of India-created IP, the shift into Tier 2 and Tier 3 cities, and deeper integration with headquarters, India is moving from talent at scale to talent with strategic equity. That fundamentally reshapes the global operating model.*



Namita Adavi, Partner

zinnov



AI as an Operating Core, Not a Program

AI features prominently in every perspective, but not as a discrete initiative. Contributors describe AI as the organizing logic around which GCCs are being redesigned.

In 2026, AI is less about experimentation and more about operational authority. GCCs are increasingly expected to own the foundations that allow AI to scale—data quality, governance, platform modernization, and responsible deployment.

Key shifts include:

- GCCs emerging as **AI orchestration hubs**, responsible for enterprise-wide AI charters.
- Transition from pilots to **production-grade AI embedded into core functions** such as engineering, operations, finance, and risk.
- Structured efforts to eliminate accumulated technology and process debt that constrains AI-led transformation.

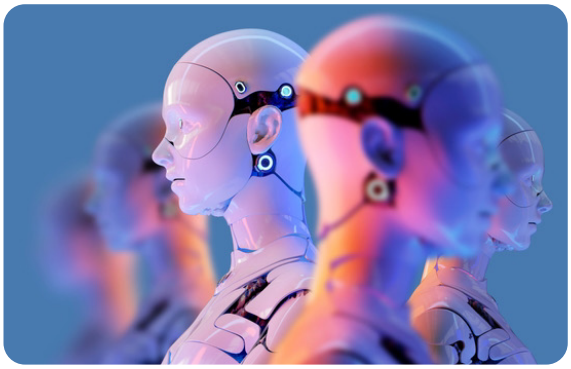
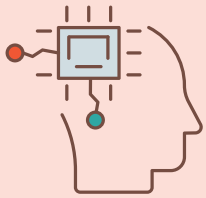


Table: How AI Is Reframing GCC Mandates



Dimension	Earlier Phase	2026 Direction
Data	Support asset	Strategic product owned globally
AI	Isolated pilots	Enterprise operating layer
Governance	Fragmented	Centralized within GCCs
Success metrics	Efficiency-led	Outcome- and impact-led

> *If we don't build deeper domain expertise and move up the value chain, AI will make the GCC irrelevant. It's time to stop considering ourselves a cost satellite and start behaving like a fully integrated, decision-making center.*



Tanay Kediyal, Partner and Head of Client Partner Management

gloplax

Product, Platform, and IP Ownership

One of the clearest markers of GCC maturity in 2026 is upstream responsibility. Contributors point to a decisive relocation of product and platform ownership into India-based teams.

This is visible in several ways. GCCs are increasingly accountable for complete product lifecycles, from architecture and design through to deployment, iteration, and customer impact. At the same time, GCC-origin IP is gaining prominence, particularly in software, data platforms, and AI-enabled products.

Notable patterns include:

- GCC-led ownership of **end-to-end product lifecycles.**
- Growth of **global product, architecture, and P&L roles** based in India.
- Greater proximity between GCC teams and market-facing outcomes.

> *As enterprises move toward AI-first operating models, GCCs in 2026 will sit at the center—automating services into software and clearing decades of hidden tech and process debt so transformation can truly scale.*



Achyuta Ghosh, Executive Research Leader

HFS



Talent Architecture and Leadership Expectations

Talent models underpinning GCCs are being fundamentally reworked. Scale alone is no longer a proxy for relevance. Instead, contributors emphasize depth, specialization, and leadership quality.

In 2026, workforce strategies are defined by flexibility and capability rather than static roles.

Key shifts include:

- Movement from role-based hierarchies to **skills-first architectures**.
- Rising demand for niche expertise across AI, data, systems architecture, and domain-led product roles.
- Leadership becoming the primary differentiator—particularly leaders who can operate AI-native, outcome-driven models.

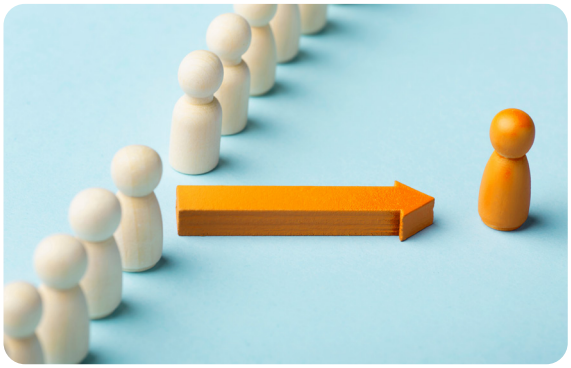
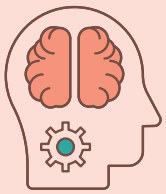


Table: Evolution of GCC Talent Models



Dimension	Traditional Model	2026 Model
Hiring logic	Role-based	Skill- and capability-based
Progression	Tenure-driven	Impact- and expertise-driven
Team shape	Pyramid	Diamond / fluid teams
Leadership focus	Operations	Outcomes and enterprise value

> *The next wave of GCC evolution will demand deep techno-functional capabilities that can enable, transform, and impact the core global business value chain at scale.*



Shalini Pillay, Partner and India Leader – GCCs

KPMG

Geography and Distributed Control Models

Location strategy in 2026 reflects intent rather than arbitrage. Contributors consistently describe geography as a resilience and capability decision.

While Tier-1 cities continue to play a role, expansion into Tier-2 and Tier-3 cities is accelerating, driven by differentiated talent pools and long-term scalability rather than short-term cost advantage.

Observed trends include:

- Adoption of **hub-and-spoke models** that balance depth with distribution.
- Multi-city GCC networks aligned to distinct capability clusters.
- Lean GCCs launched by mid-sized enterprises with focused mandates from inception.

> *GCCs in 2026 will no longer be viewed as back offices but as the strategic heart of the enterprise, where global products are built, governed, and scaled. Size is a thing of the past; true power lies in agility. The leanest GCCs will lead to global innovation powerhouses.*



Mohith Mohan, CEO & Co-Founder

MOAR.



Measurement, Governance, and the End of Cost-Centric Metrics

As ownership shifts, traditional metrics lose relevance. Contributors highlight a move away from cost-per-FTE and utilization toward enterprise-impact measures.

In 2026, leading GCCs are governed through:

- **Outcome-based scorecards**, linking GCC performance to revenue enablement, speed to market, and risk mitigation.
- Shared accountability between GCC leaders and global business heads.
- Governance models that emphasize decision quality and strategic contribution over throughput.

> *Enterprises that leverage the GCC construct with forward-thinking, inclusive strategies and value at the center will continue to deliver robust business outcomes.*



Premil Dennison, Managing Partner

BRIDGEPATH INNOVATIONS



Key Takeaways for GCC Leaders

This page distills the report's insights into direct, leadership-level implications. It is designed as a practical reference for GCC heads, enterprise sponsors, and ecosystem partners.

What 2026 Demands of GCC Leaders



1. Design for ownership, not delegation

GCCs that continue to operate as execution arms will face relevance risk. Leading centers are being designed with explicit ownership of products, platforms, data, and outcomes from day one.

2. Treat AI as operating infrastructure

AI is no longer an initiative to be sponsored or piloted. GCC leaders must own the data foundations, governance models, and modernization agenda that allow AI to scale responsibly across the enterprise.





3. Rebuild talent architecture around capability

Workforce scale is no longer a strategic advantage. Skills-first models, niche expertise, and AI-native leadership will determine long-term value creation.

4. Measure what the enterprise values

Cost and utilization metrics are insufficient. GCC performance must be tied to business outcomes such as speed to market, revenue enablement, resilience, and risk reduction.





5. Use geography as a strategic lever

Multi-city and hub-and-spoke models should be designed around capability depth and resilience, not short-term arbitrage.

6. Accept divergence as inevitable

The GCC ecosystem will not mature uniformly. Leaders should focus less on benchmarking against peers and more on alignment with enterprise-specific objectives.



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Our mission is to be the go-to **new-age media platform** for GCCs, facilitating knowledge sharing, talent development, innovation, and collaboration. Through expert insights, thought leadership, and meaningful conversations, we bridge the gap between ecosystem players, fostering connections that unlock growth potential and learning.

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