Everest Group Global Capability Center (GCC) Setup Capabilities in India – PEAK Matrix® Assessment 2026

Focus on Deloitte

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Introduction

Global Capability Centers (GCCs) continue to see strong momentum, with enterprises establishing over 300 offshore and nearshore centers every year. In parallel, the role of GCCs continues to evolve from cost and delivery centers into long-term strategic assets that drive growth, capability expansion, and business agility. India remains the preferred setup destination, supported by its mature talent ecosystem, enabling regulatory environment, and evolving provider landscape.

As the GCC setup market becomes increasingly dynamic, competition is intensifying across a widening provider base. Leading providers are establishing dedicated GCC business units, building specialized capabilities in setup, talent, and transformation, and recruiting experienced GCC leadership to sharpen their focus and establish credibility with enterprises. The result is broader enterprise choice alongside a higher bar on differentiation, with providers now competing on speed to operational readiness and depth of functional and domain expertise across the full life cycle.

This year's assessment builds on last year's GCC Setup Capabilities PEAK Matrix® and evaluates how the 30 leading providers are helping enterprises establish GCCs efficiently, accelerate operational readiness and build scalable operating models that deliver long-term business value.

The report features GCC Setup Capabilities in India PEAK Matrix®, a comprehensive framework that evaluates and categorizes providers based on their GCC setup-focused capabilities.

The assessment is based on Everest Group's annual Request for Information (RFI) process, interactions with leading providers, client reference checks, and an ongoing analysis of the market.

The full report includes the profiles of the following 30 leading providers featured on the Global Capability Center (GCC) Setup Capabilities in India – PEAK Matrix® Assessment 2026:

- **Leaders:** Accenture, ANSR, Capgemini, Cognizant, Deloitte, EY, HCLTech, Infosys, and TCS
- **Major Contenders:** Aeries Technology, CGI, Coforge, Embark, Genpact, Hexaware, IBM, ITC Infotech, KPMG, LTM, NTT DATA, Persistent Systems, PwC, Tech Mahindra, and Wipro
- **Aspirants:** Altimetrik, Datamatics, SecondHQ, Tenarai, Yash Technologies, and Zensar Technologies

Scope of this report

Geography: India

Industry: GCC setup capabilities

Services: GCC setup services

Scope of the evaluation

This assessment focuses on GCC setup capabilities in India

Providers support enterprises across the GCC journey in multiple ways, including setup, operations, transformation, and carve-outs. Within this broad landscape, this assessment emphasizes GCC setups.

Focus of the research

- GCC center setup
- GCC operations
- GCC transformation
- GCC carve-out/divestiture

Build-Operate-Transfer (BOT)

Provider provides capital and runs operations in the initial stages; option for transfer back to the enterprise at a later date

- Ownership retained with the provider until transfer
- Provider incurs initial capital for setting up the GCC
- Day-to-day operations of GCC handled by provider
- Limited governance/oversight required from enterprise side

Assisted Build-Out

Enterprise retains management control, and the provider manages operations or may just provide delivery resources

- Owned by the enterprise
- Enterprise incurs all expenses
- Provider handles operations in exchange for a fee
- Higher degree of governance/oversight required from enterprise side

Joint Venture (JV)

Co-invested operations and management control between the enterprise and the provider

- Joint ownership between enterprise and provider
- JV partners bear the costs in proportion to their equity holding
- Provider employees oversee operations initially; subsequently, jointly managed
- Requires high governance; involves managing a separate organization in conjunction with a partner

GCC Setup Capabilities Services PEAK Matrix® characteristics

Leaders

Accenture, ANSR, Capgemini, Cognizant, Deloitte, EY, HCLTech, Infosys, and TCS

- Leaders demonstrate mature GCC setup capabilities across strategy, design, build, and transition, supported by flexible delivery methodologies, customizable engagement approaches, proprietary accelerators, and dedicated GCC practices
  - These providers increasingly differentiate through AI-enabled setup frameworks, reusable assets, and ecosystem orchestration that accelerate decision-making, governance, talent readiness, and operating model design
- Most Leaders have established dedicated GCC leadership teams and scalable delivery models, enabling them to manage multiple engagements across geographies and enterprise segments
- Leaders act as long-term strategic partners, supporting clients throughout the GCC setup life cycle, operating model evolution, and capability expansion

Major Contenders

Aeries Technology, CGI, Coforge, Embark, Genpact, Hexaware, IBM, ITC Infotech, KPMG, LTM, NTT DATA, Persistent Systems, PwC, Tech Mahindra, and Wipro

- Major Contenders have established GCC setup capabilities but continue to strengthen the breadth, scale, or industrialization of their offerings
- Many of these providers are actively building out GCC-dedicated offerings, such as standardized playbooks and AI-enabled frameworks to enhance setup execution
- Several providers differentiate through strengths in specific industries, enterprise segments, or technology domains, although execution maturity has scope to improve
- While many are expanding rapidly, greater consistency in service delivery and stronger execution across the GCC setup life cycle will be critical to closing the gap with Leaders

Aspirants

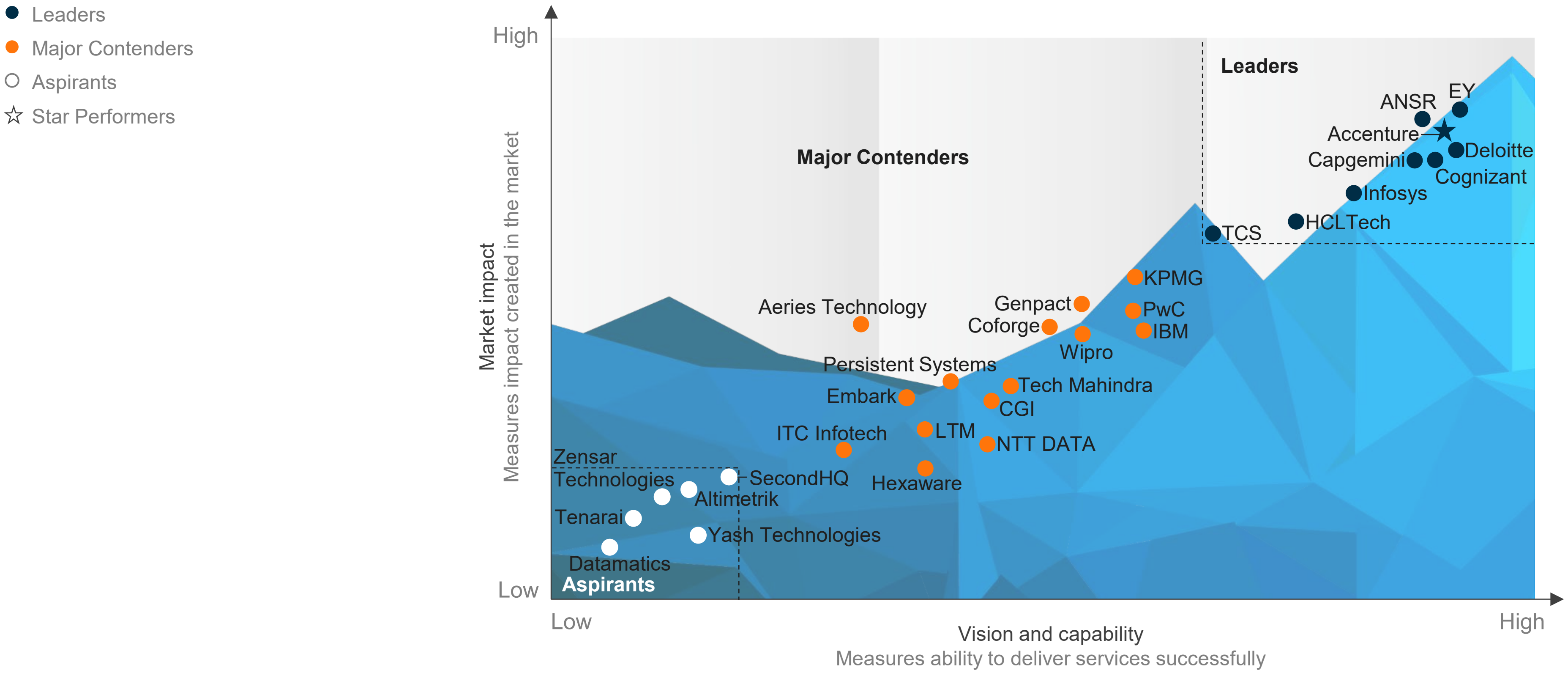
Altimetrik, Datamatics, SecondHQ, Tenarai, Yash Technologies, and Zensar Technologies

- Aspirants are building foundational GCC setup capabilities, primarily serving small to mid-market enterprises through focused setup engagements
- Their offerings typically leverage selective consulting capabilities, partner ecosystems, or technology strengths, but remain less mature in their capabilities across the full GCC setup life cycle
- To strengthen their competitive positioning in the evolving GCC setup market, most providers are moving toward establishing dedicated GCC teams, standardized frameworks, and ecosystem partnerships that enhance delivery maturity
- Continued investment in setup-specific intellectual property, repeatable delivery frameworks, and broader client proof points will be essential to scale their capabilities and market impact

Everest Group PEAK Matrix®

Global Capability Center (GCC) Setup Capabilities in India – PEAK Matrix® Assessment 2026 | Deloitte is positioned as a Leader

Everest Group Global Capability Center (GCC) Setup Capabilities in India – PEAK Matrix® Assessment 2026[1]



1 Assessments for CGI, Datamatics, Hexaware, ITC Infotech, LTM, NTT DATA, Tenarai, Yash Technologies, and Zensar Technologies exclude inputs from the provider and are based on Everest Group's estimates that leverage Everest Group's proprietary data assets, providers' public disclosure, and interaction with buyers
Source: Everest Group (2026)

Deloitte

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall

Strengths

- Offers flexible GCC setup engagement models, including BOT, BOTT, BOA, assisted build-out, enabling clients to choose models aligned to ownership, control, and risk preferences
- Provides a multidisciplinary **one-stop** setup model across consulting, tax, legal, assurance, cyber, technology, risk, and transformation, supported by a common India entity that enables coordinated execution across member firms
- Differentiates through high-touch setup support, with clients appreciating Deloitte’s hands-on guidance and white-glove handholding across the setup journey from planning and entity readiness to ramp-up and stabilization
- Strengthened physical setup support through partnerships with Embark and My Home Constructions, supporting location selection, office design, and scalable GCC infrastructure
- Uses proprietary tools, such as GCCaaS, Deloitte Ascend, Visual Choice, D.Footprint, and Capability Edge, to support setup orchestration, location decisions, and governance
- Strengthened GCC setup capabilities by hiring leaders and practitioners with prior GCC experience
- Maintains a diversified setup portfolio across BFSI, HLS, manufacturing, RCPG, and TMT, with client headquarters spanning North America, Europe, and other global regions

Limitations

- Audit independence constraints may limit Deloitte’s ability to pursue or fully support certain GCC setup opportunities across global client relationships
- Predominantly focuses on large enterprises, with scope to expand traction among small and mid-market GCC buyers

Market trends

Enterprises are increasingly adopting provider-supported GCC setups to accelerate execution, access specialized capabilities, and mitigate setup complexity

Market size and growth

- The provider-supported GCC market is on a strong growth trajectory, with momentum expected to sustain over the medium term. This market, which spans support for GCC setups, operations, transformations, and carve-outs/divestitures, is projected to expand from US$25 billion in 2025 to US$40 billion by 2027, representing a ~25% CAGR
- Within this, the provider-assisted GCC setup segment stands out as one of the fastest-growing areas, expected to expand at a ~44% CAGR between 2025 and 2027, scaling from ~US$4.3 billion to ~US$8.9 billion and emerging as a key driver of overall market growth

Key drivers

Lower upfront financial commitment	Shared or deferred investments reduce the enterprise's initial cost burden, especially in BOT models where providers cover setup costs until handover, lowering initial capital outlay.
Ease of setup and management	Streamlined models simplify governance and operations, while allowing for speed-to-market. BOTs can be managed end-to-end until handover, Assisted Build-Outs allow provider-led delivery, and JVs balance ownership with shared accountability. These models reduce complexity, accelerate timelines, and ensure smooth GCC establishment.
Access to digital/niche capabilities	As GCCs become increasingly strategic, they are driving niche/digital capabilities aligned with core business objectives. Providers with access to talent pools that deliver these capabilities are emerging as preferred partners to drive innovation at scale while enabling enterprises to retain greater control over strategic and critical capabilities.
Access to proven ecosystems	Local market knowledge, regulatory understanding, established partnerships across the GCC setup life cycle, and access to mature talent ecosystems enable enterprises to reduce entry risks and support smoother expansion into new geographies.

Opportunities and challenges

Limited internal experience establishing GCCs	Adopters of the GCC model, particularly first-time adopters and mid-market enterprises, lack expertise across location strategy, entity setup, governance, hiring, and operations. Providers can offer end-to-end setup support through standardized playbooks, proven methodologies, and experienced delivery teams.
Regulatory and compliance complexity	Navigating tax structures, labor regulations, legal entity creation, data privacy, and industry-specific compliance creates execution risk. Providers can reduce complexity through local regulatory expertise, legal partnerships, and compliance frameworks.
Uncertainty around business case and RoI	Enterprises often struggle to quantify long-term value beyond labor arbitrage and remain uncertain about setup costs, timelines, and payback. Providers can develop robust business cases, benchmark costs, and define phased value realization roadmaps.

Provider landscape analysis

The GCC setup services market remains spread across a broad set of providers with differentiated setup propositions

Market share analysis of the providers[1]

2025; percentage of overall market of GCC setup services in India

1 Providers are listed alphabetically within each range

Key buyer considerations

Enterprises increasingly prioritize providers that demonstrate execution maturity, specialized capabilities, engagement flexibility, and governance transparency alongside competitive pricing

Key sourcing criteria

High

Priority

Low

Ease of setting up and transition management
Provider-assisted setup models bring standardized playbooks and reduce operational complexity by proven transition frameworks

Access to specialized talent
Strong GCC leadership and talent pipelines for sustainable scaling

Proven GCC setup track record
Demonstrated success across similar GCC setups, supported by client references

Commercial and engagement flexibility
Constructs and engagement models tailored to enterprise objectives and evolving business needs

Capability depth and digital enablement
Deep functional, industry, and digital capabilities backed by mature partner ecosystems and delivery accelerators

Transparency and clarity of scope
Clear definition of scope, responsibilities, governance, and commercial terms to reduce execution uncertainty

Summary analysis

Buyers are increasingly evaluating providers beyond their ability to just set up GCCs, placing greater emphasis on execution maturity across the setup life cycle. Proven GCC delivery experience, structured transition frameworks, specialized leadership, and standardized methodologies help enterprises reduce execution risk while accelerating time-to-value. Flexible engagement models and transparent governance further enable organizations to align provider support with evolving business objectives.

Enterprises also differentiate providers based on the depth of their functional, industry, and digital capabilities, supported by mature partner ecosystems and scalable talent models. The ability to combine advisory expertise with operational execution, navigate regulatory complexity, and deliver sustained value beyond initial setup is becoming a key differentiator as GCCs evolve into long-term strategic capability centers.

Key takeaways for buyers

To maximize long-term GCC success, buyers should prioritize providers with proven execution capabilities, select engagement models aligned to their strategic objectives, and partner with organizations that demonstrate sustained investment and long-term commitment to the GCC market.

Proven execution across setup life cycle

Buyers should evaluate providers on their ability to deliver end-to-end GCC support across setup, governance, talent, and technology aligned to their evolving business needs. Proven client outcomes, standardized playbooks, and strong ecosystem partnerships act as important indicators of execution maturity.

Trusted partner and flexible engagement

Engagement models vary in governance, flexibility, and ownership, while providers differ in expertise, ecosystem maturity, engagement flexibility, and delivery approaches ranging from templatized playbooks to highly customized solutions. Buyers should evaluate both dimensions to ensure alignment with their GCC objectives.

Evolving provider landscape

Competition in the GCC market is intensifying as more providers enter the space. While many adopt a reactive approach, leading providers are investing in dedicated GCC practices, experienced leadership, and structured offerings. Buyers should prioritize providers with a proactive, long-term commitment to the GCC market.

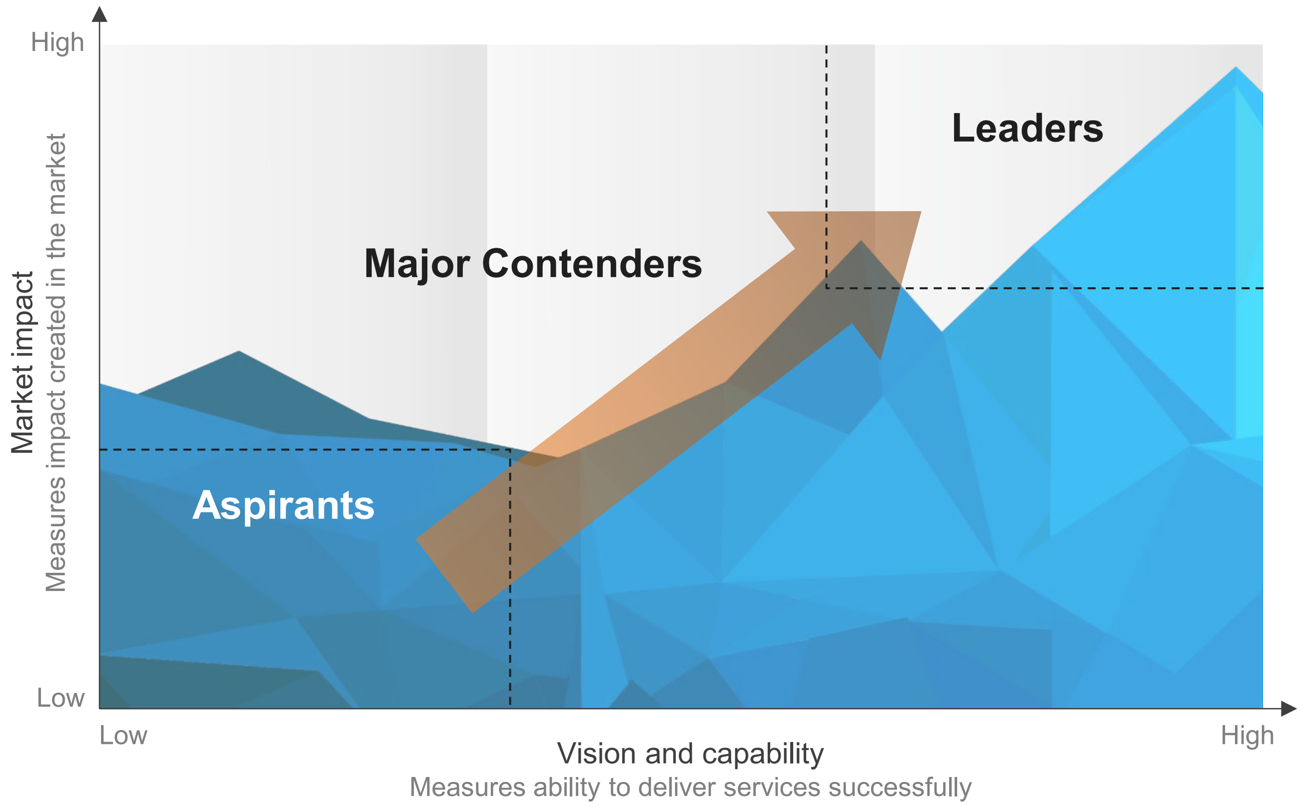
Appendix

PEAK Matrix® framework

FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



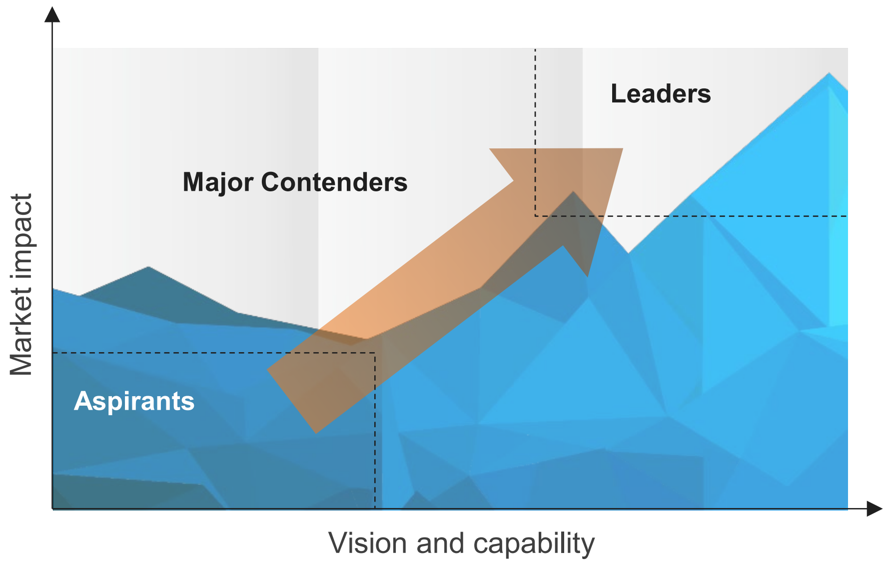
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, YoY growth, and deal value/volume

Portfolio mix
Diversity of client/revenue base across geographies and type of engagements

Value delivered
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Scope of services offered
Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint
Delivery footprint and global sourcing mix

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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