



India GCC culture sensing report

Culture insights: Deep-dive, industry comparison and key culture differentiators

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Foreword



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Dear reader,

We are delighted to present the results of our India GCC Culture Sensing Report, a comprehensive analysis of cultural drivers. This report evaluates key insights across five major industries: financial services; consumer; energy, resources and industrials; life sciences and healthcare; and technology, media and communication, covering 100 Indian Global Capability Centres (GCCs) from the Fortune 500 Index.

In today's dynamic and complex business environment, culture stands as a critical enabler of sustainable success. Recognising this, we explored and analysed the employee sentiment across five fundamental culture drivers: growth and learning, empowerment and inclusion, performance and results, ethics and sustainability, and agility and innovation. This study offers a nuanced understanding of how organisations can align their cultural priorities with business objectives to drive long-term value creation.

Our aim in conducting this study is to provide actionable insights and strategies that empower organisations and industry leaders to cultivate a resilient and high-performing culture. By using the findings of this study, leaders can make data-driven decisions to reinforce the cultural dimensions most aligned with their strategic goals, ensuring both organisational excellence and stakeholder satisfaction.

If you have any questions about the information or findings within this report, please do not hesitate to contact us. We look forward to working with you.



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Analysis framework and scope



Scope of India GCC culture study

Data analysed from a range of GCC organisations across various industries in India, focusing on key culture drivers



5

Key industries in India



100

Top organisations with GCCs in India analysed



5

Fundamental culture drivers



130,000

Reviews from social media platforms

Deloitte's holistic culture assessment framework

Overall culture assessment is based on Deloitte's proprietary framework encompassing five key culture drivers



Empowerment and inclusion

This includes autonomy to act, power sharing, meaningful diversity, psychological safety and a people-centric workforce.



Agility and innovation

This includes comfort with ambiguity, risk appetite, fail fast and learn fast and collaboration.



Ethics and sustainability

This includes ethics culture, integrity, economic, environmental and social perspectives.



Growth and learning

This includes learning orientation, commitment to learning, learning support and career growth.

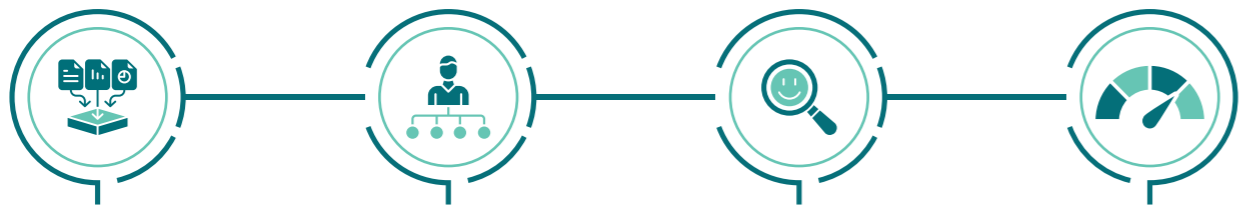


Performance and results

This includes belief alignment, meritocracy, performance enablers, leader focus and shared ambition.

Methodology overview

An AI-driven approach is used to conduct a culture assessment and extract insights to enhance the organisation’s culture



Data collection
Gather employee reviews data for the last four years from various social media platforms, along with publicly available information on key financial metrics.

Driver mapping
Use AI algorithms to map every employee review to the culture drivers and sub-drivers.

Sentiment analysis
Conduct AI-driven sentiment modelling to map every employee review to a positive sentiment or a negative sentiment

Final scoring
Calculate final culture scores using the formula mentioned below
$$\frac{(\# \text{ of positive reviews} - \# \text{ of negative reviews})}{\text{Total } \# \text{ of reviews}}$$

Post that, normalise the culture scores between 1 and 100 to arrive at the final culture score.

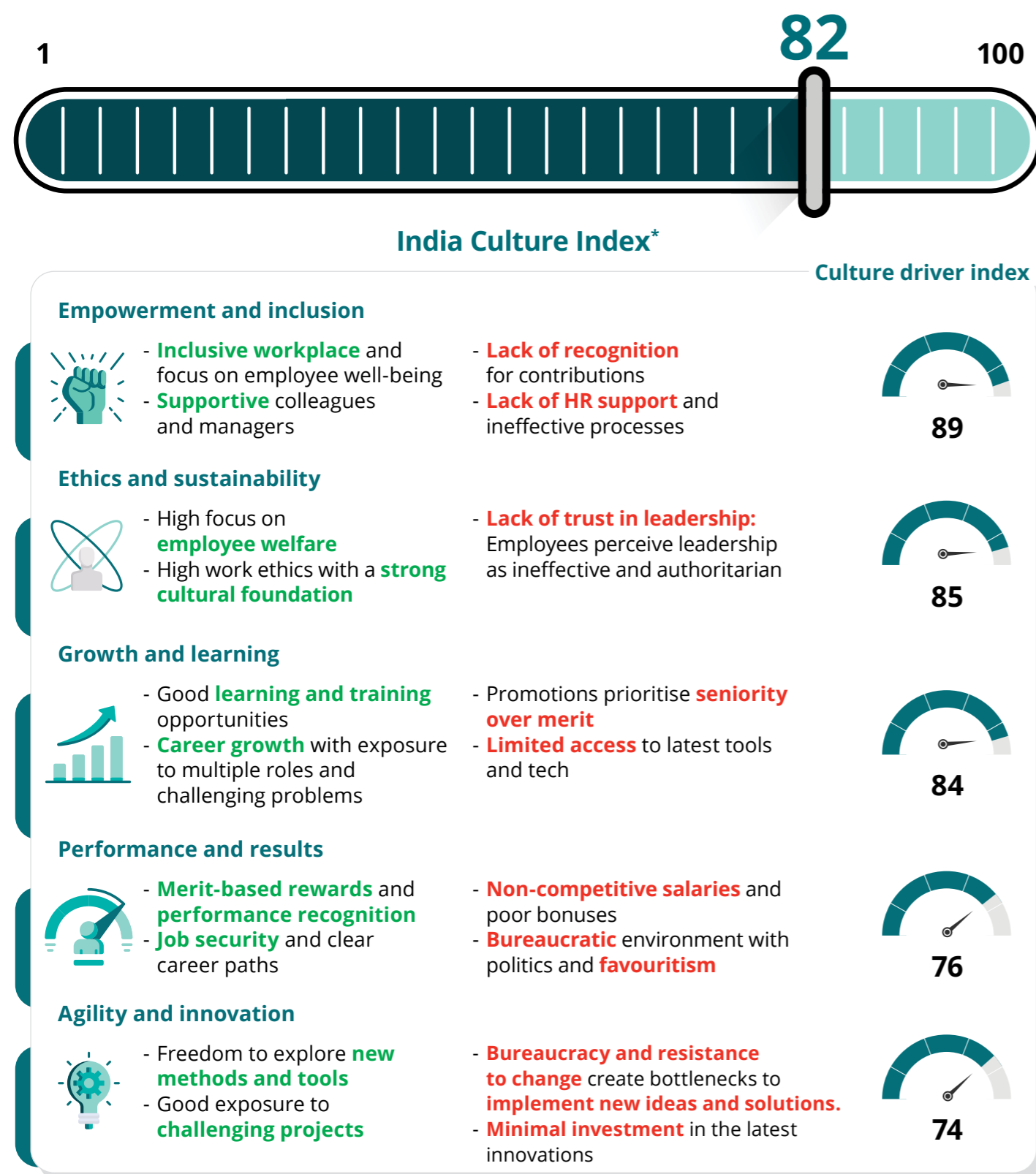


India GCC culture index



India GCC culture index

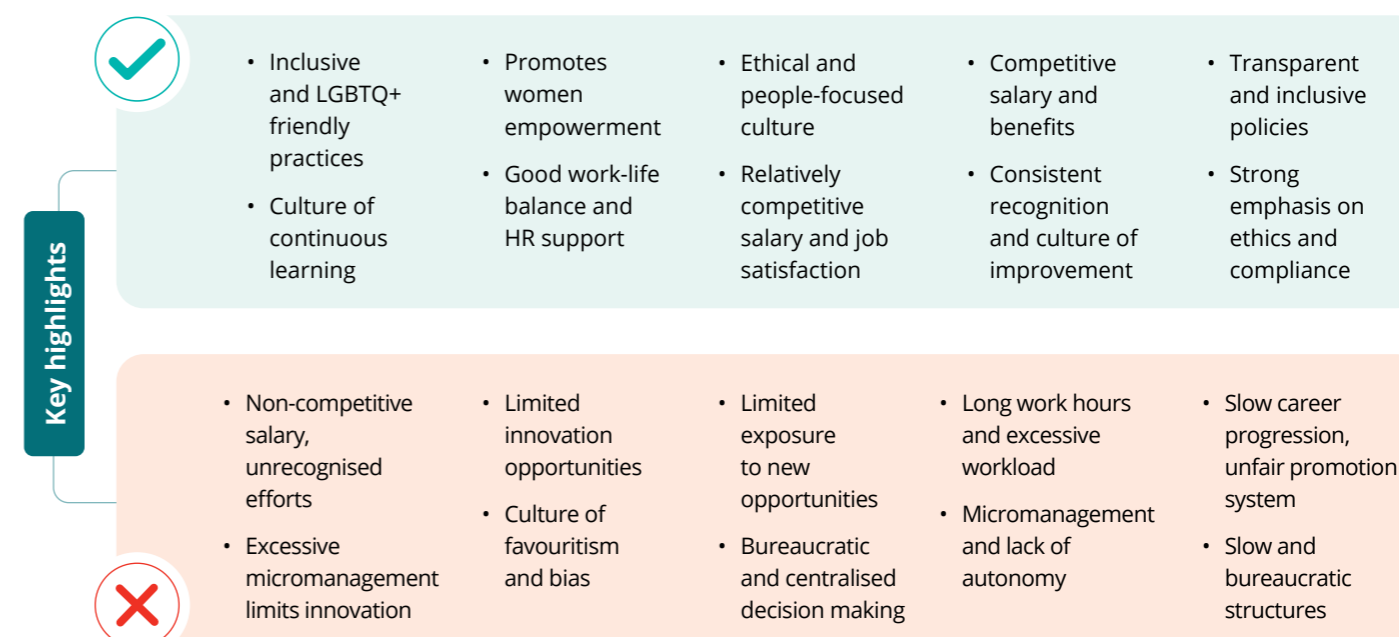
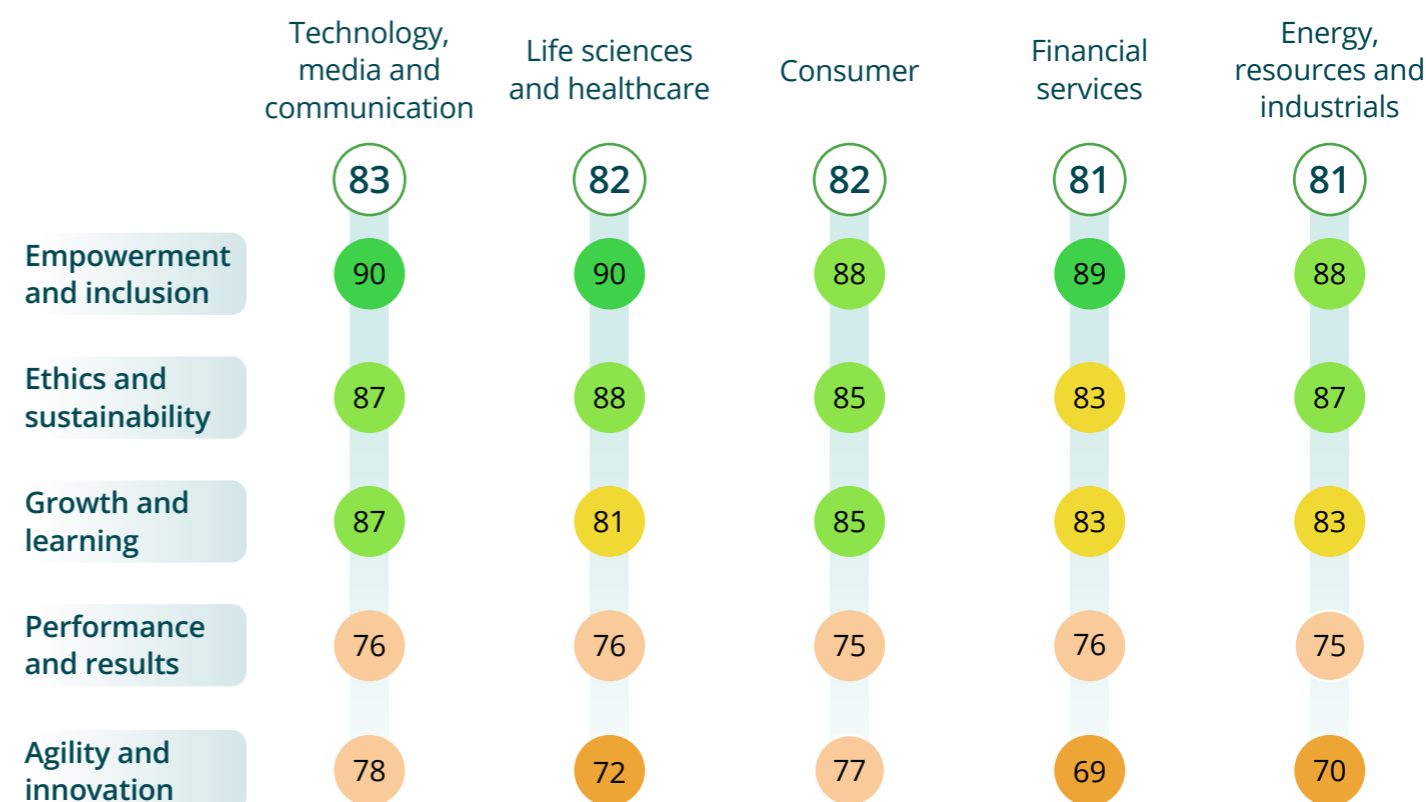
Overall, Indian GCC organisations are showcasing a high culture score, primarily contributed by factors such as emphasis on inclusive and ethical culture and learning opportunities



*The Culture Index is a normalised sentiment score derived from external employee reviews to evaluate key aspects of an organisation's culture

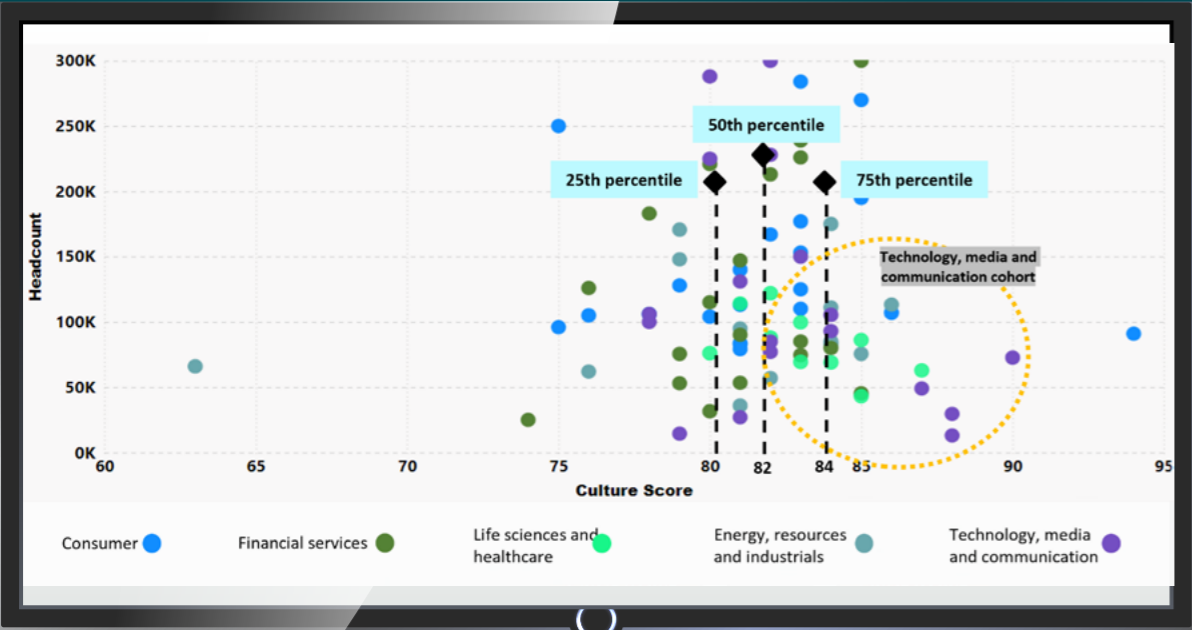
Industry comparative overview

Overall culture scores are similar across industries, but specific culture pillars, such as agility and innovation and growth and learning, show variation



Understanding distribution by industry and organisation

Culture scores vary across the spectrum, reflecting both leading and lagging behaviours among organisations



Technology, media and communication maintains a relatively **high and consistent culture score**, with less variability than others. **Companies in this industry have good scores**, reflecting a **positive work culture**.



The energy, resources and industrials industry shows **significant variability in culture scores**, with some companies achieving high scores while the majority lag, indicating **challenges in maintaining a consistently positive work environment**.



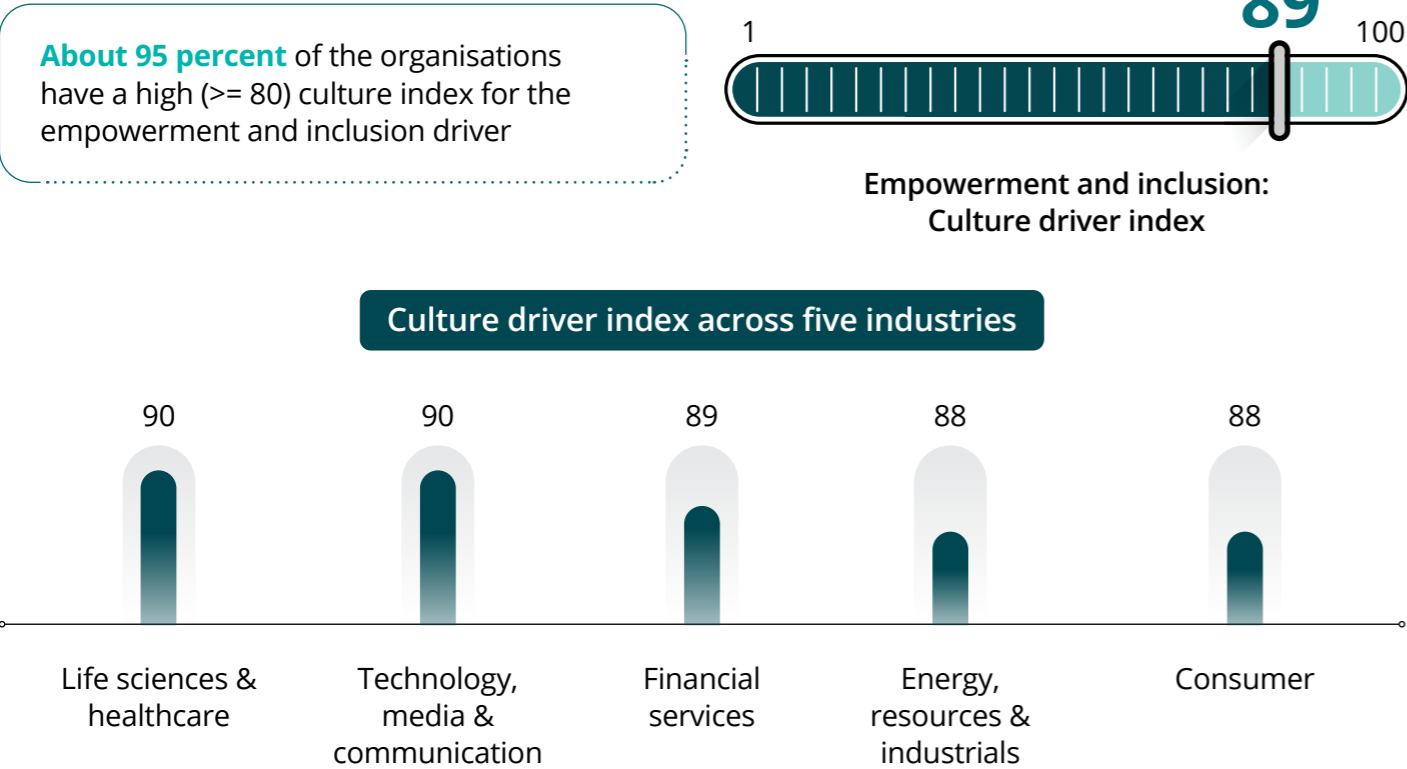
Industries have **median culture scores above 80**, indicating generally **positive work environments** across GCCs.

Deep-dive into culture drivers



Empowerment and inclusion

A high score reflects an inclusive, collaborative culture that boosts well-being and morale



Insights

What is working well?

Inclusive workplace

The workplace values a diverse workforce and provides equal opportunities to employees.

Collaborative culture

Approachable and supportive leadership and team members

Employee well-being and flexibility

Multiple wellness programmes and mental health initiatives enable a thriving culture.



What is overlooked?

Ineffective HR process and support

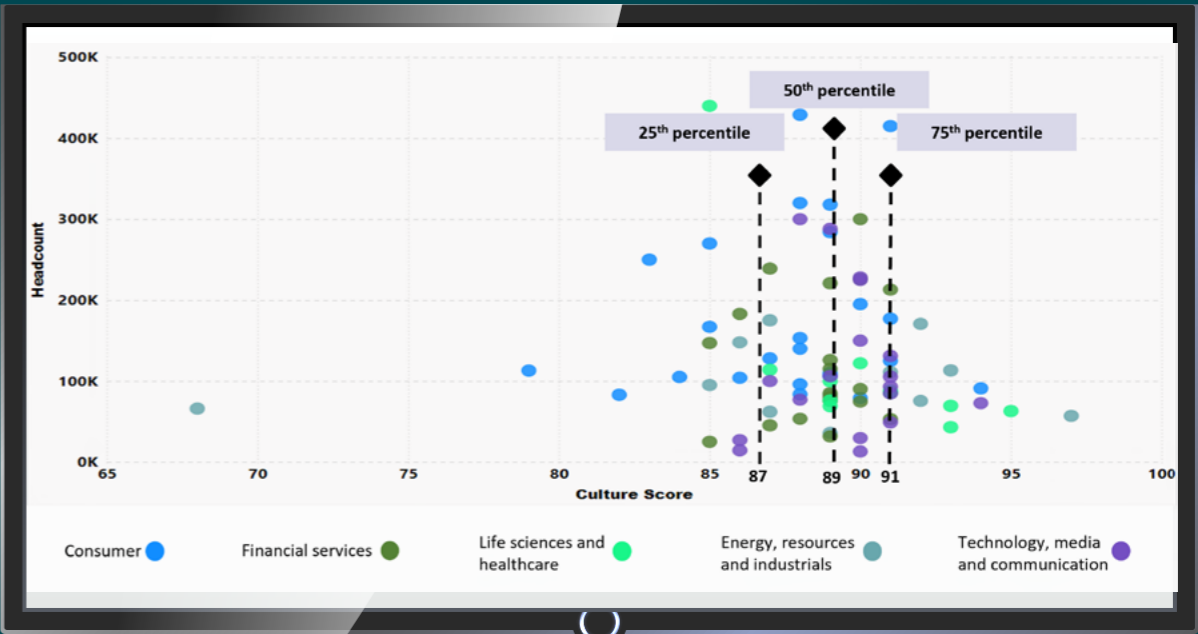
HR support is relatively unresponsive, delaying query resolution and following outdated policies.

Lack of meritocracy

Favouritism and a lack of performance-linked rewards and promotions cause low employee satisfaction.

Empowerment and inclusion

Deep-dive across organisational distribution for empowerment and inclusion pillar



In industries such as **financial and technology, media and communication**, most companies score in a close range of 89-91, indicating **consistent competition**.



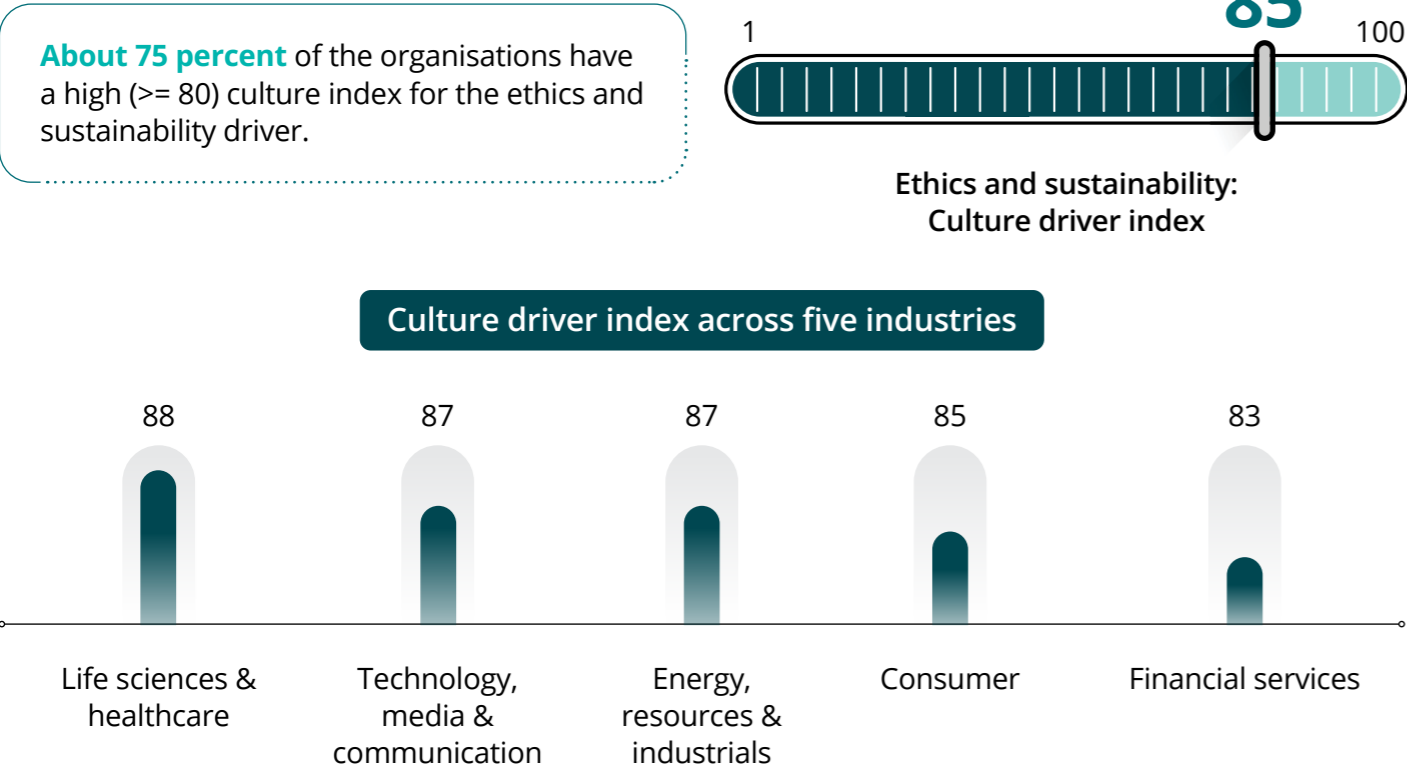
The consumer industry has the highest proportion of organisations with a **culture score below the 50th percentile**, as compared to other industries



25th percentile - 87
75th percentile - 91
The difference between the 75th and 25th is only 4, which is the lowest across all the pillars, indicating a stronger empowerment and inclusion culture.

Ethics and sustainability

A higher score indicates adherence to responsible practices that uphold ethical standards and integrity



Insights

What is working well?

Strong ethics

Companies often prioritise integrity, core values and compliance.

Commitment to social responsibility

Significant contributions to CSR and sustainability initiatives beyond profit-making.

Fair practices

Transparent policies and processes and equitable growth opportunities in the organisation.



What is overlooked?

Lack of trust in leadership

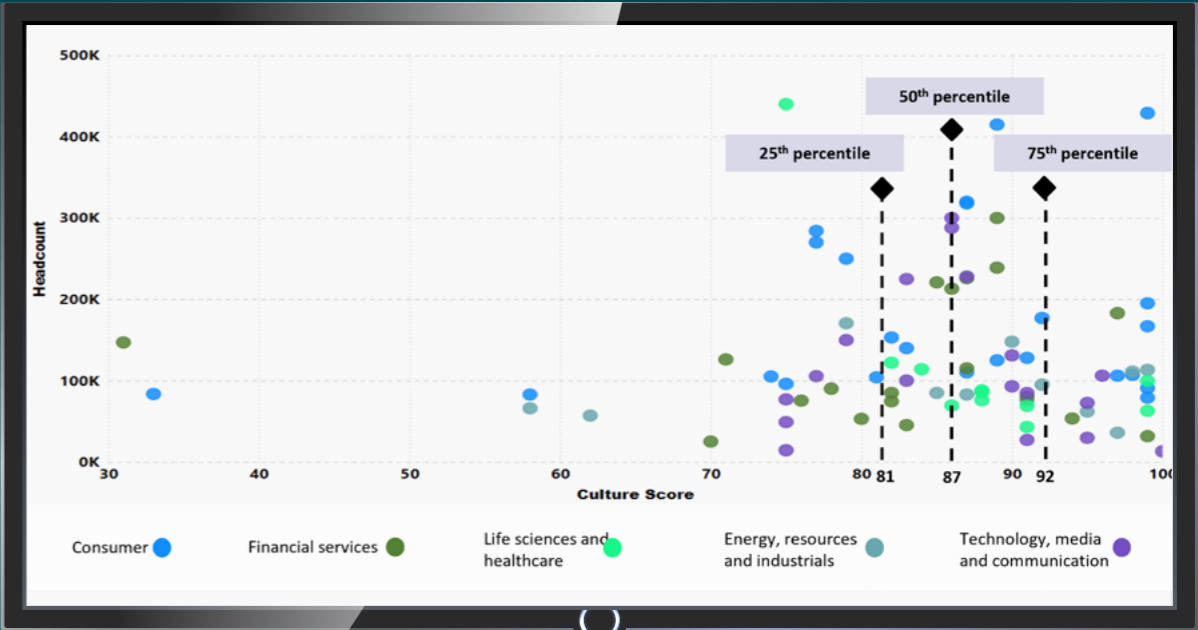
Employees perceive the leadership as ineffective and authoritarian.

Inconsistent ethical enforcement

Ethical standards are applied unevenly across teams and departments, leading to inconsistent behaviours and perceptions.

Ethics and sustainability

Deep-dive across organisational distribution for ethics and sustainability pillar



The life sciences and healthcare stands out with a high maximum score and many strong performers.



The consumer industry has a massive gap between the lowest score and the highest. This shows that some companies are thriving, while others are struggling significantly.



25th percentile - 81
75th percentile - 92
The difference between the 75th and 25th is 11, which is the highest across all the pillars, indicating higher variability in Ethics and sustainability across GCCs.

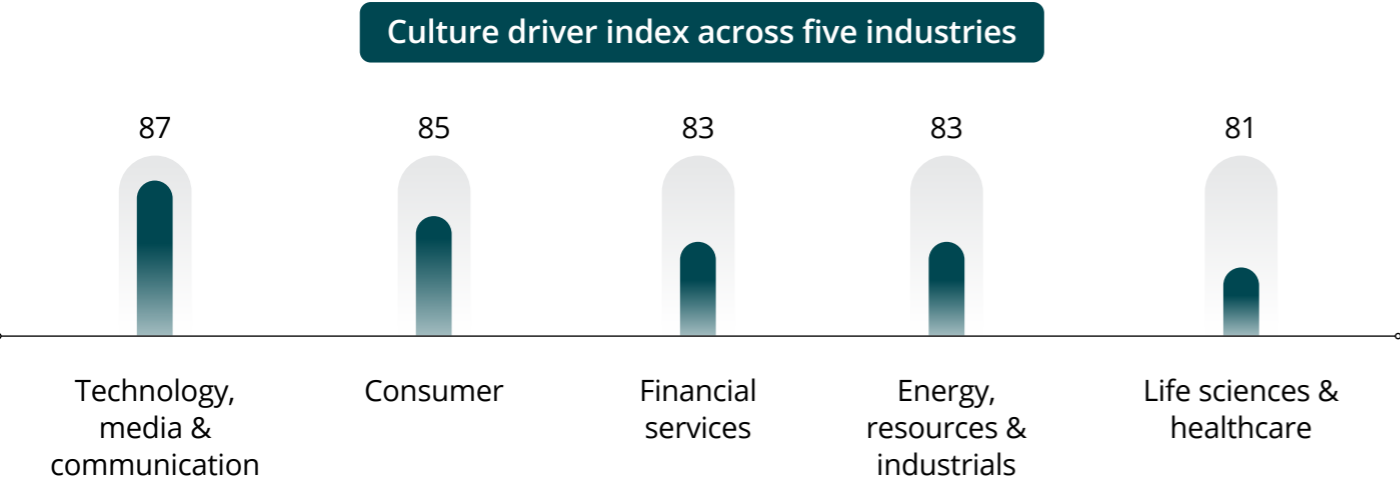
Growth and learning

A higher score reflects ample personal and professional development opportunities provided through learning resources and mentorship

About 81 percent of the organisations have a high (>= 80) culture index for the growth and learning driver



Growth and learning: Culture driver index



Insights

What is working well?

- Ample learning opportunities**
Access to resources, training and certifications fosters continuous skill enhancement.
- Supportive management**
Teamwork and guidance by leadership create a nurturing space for development.
- Flexible career development paths**
Internal role mobility and training empower exploration of varied career paths.

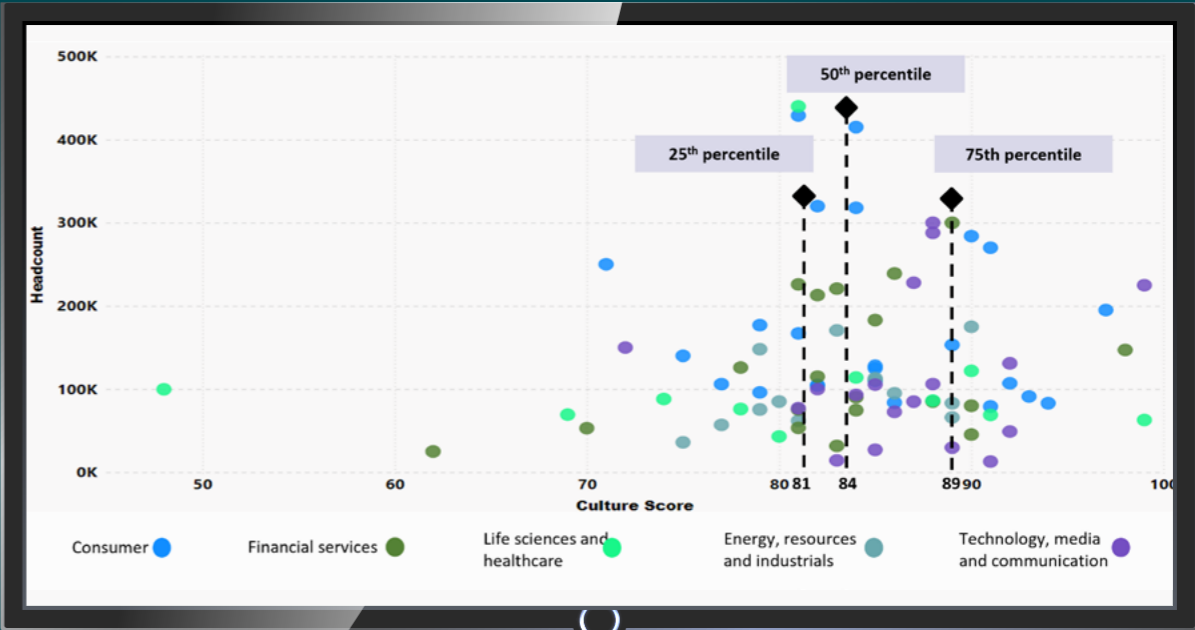


What is overlooked?

- Favouritism and politics**
Workplace biases and favouritism overshadow hard work and merit-based growth.
- Lack of technology and advanced training**
Outdated technology and a lack of training on advanced and future skills restrict rapid upskilling.

Growth and learning

Deep-dive across organisational distribution for growth and learning pillar



The technology, media and communication industry maintains a high baseline and excellent performance at the top, showcasing an inherent trend towards innovative culture and rapid industry skill movement.



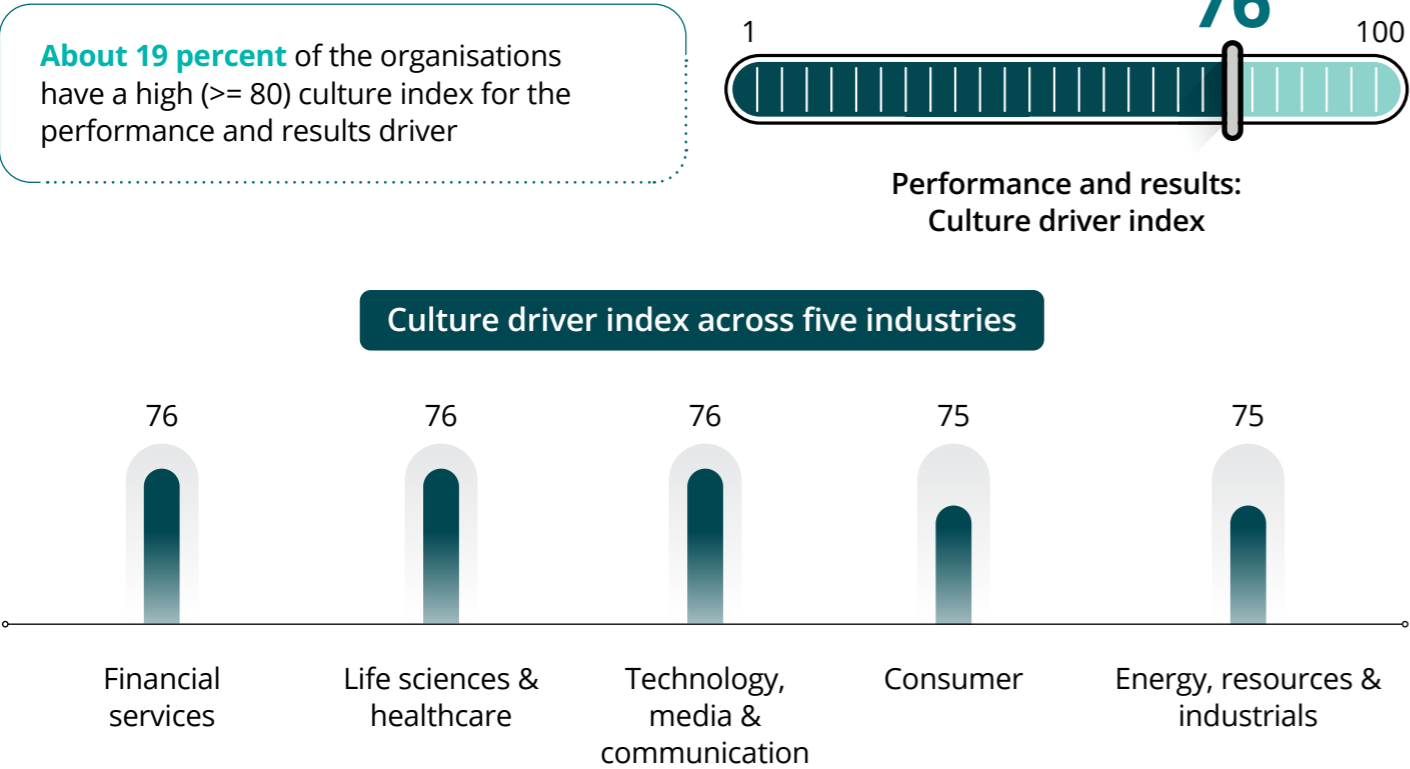
Even though the overall score for the consumer industry is high, there are still a lot of organisations with scores less than the 50th percentile, reflecting a higher spread across the spectrum.



25th percentile - 81
75th percentile - 89
The difference between the 75th and 25th is 8, which is not significantly low, but the difference between the 50th and 25th is very low, showcasing higher cluttering at lower levels.

Performance and results

A lower score reflects challenges in compensation, culture and leadership affecting employee morale



Insights

What is working well?

- Performance-driven culture**
Advancement, raises and bonuses are tied to performance, reflecting the performance-driven culture.
- Higher ownership and accountability**
Employees are empowered to take ownership of their work, boosting performance and ensuring tangible results.

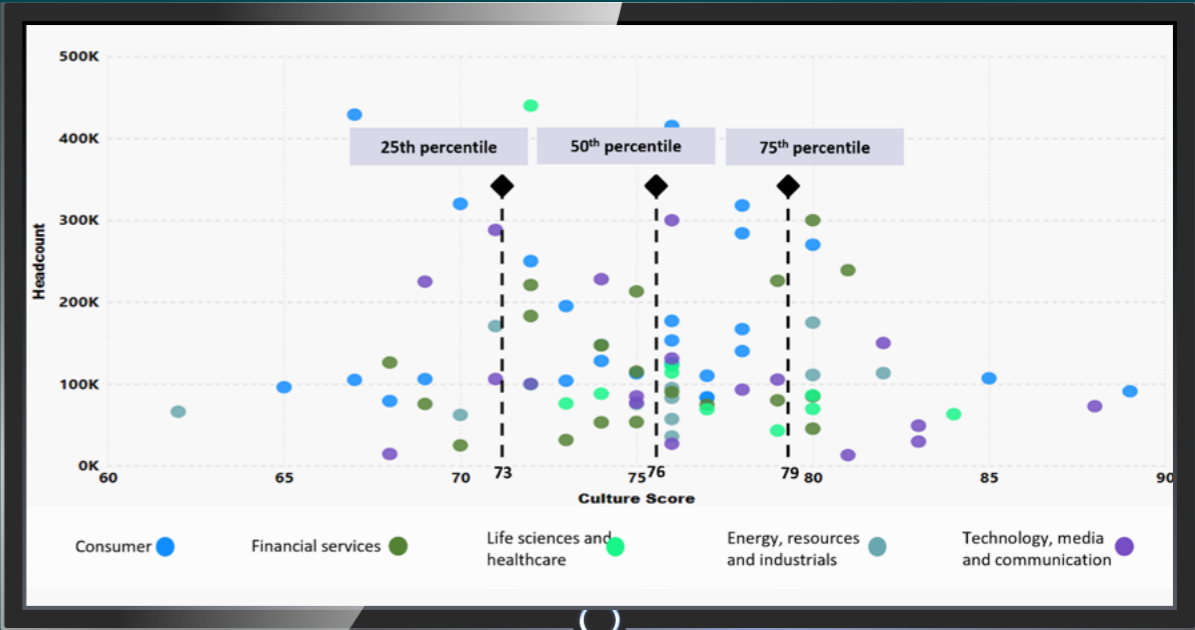


What is overlooked?

- Below-market-level compensation**
Compensation is below market standards, with significant pay disparities between internal promotions and lateral hires.
- Favouritism and politics**
Instances of favouritism in providing opportunities lead to a culture of bias and unwanted politics.
- Poor managerial support**
Managers lack technical knowledge and have poor management skills.

Performance and results

Deep-dive across organisational distribution for performance and results pillar



A steady decline in scores shows a diverse range of performance within the **consumer** industry, with **some organisations achieving strong outcomes while others lag significantly.**



The financial services industry scores are more tightly clustered than other industries, reflecting **consistent performance** across most organisations.

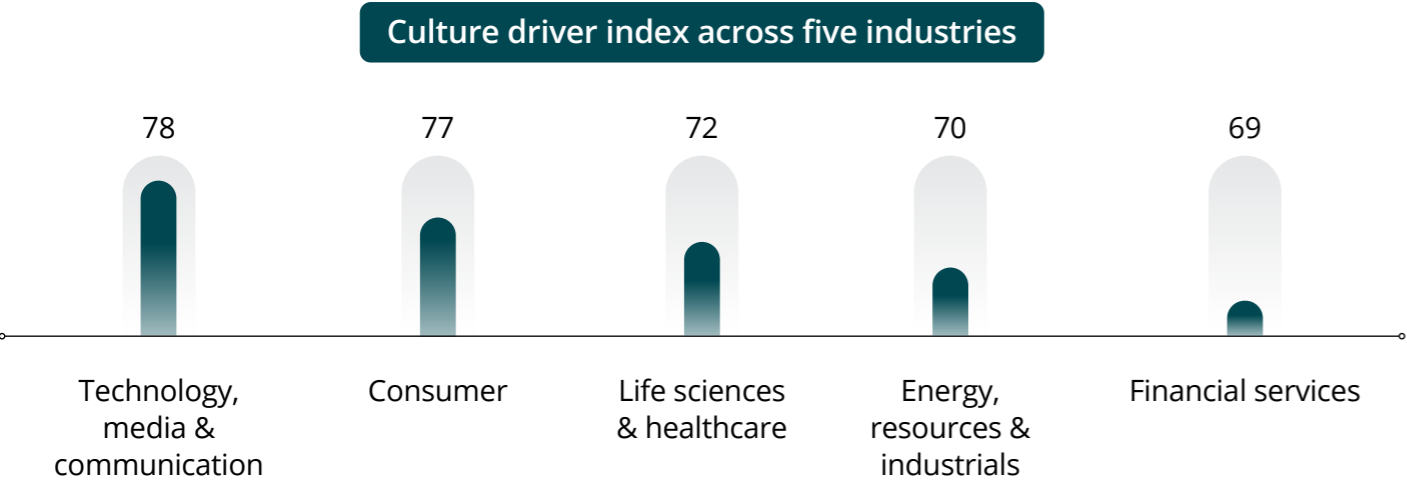


The life sciences and healthcare industry has all the scores above the 25th percentile, and the majority of the organisations are above the 50th percentile, indicating **relatively better sentiment around performance.**

Agility and innovation

A lower score reflects challenges due to micromanagement and bureaucracy, hindering creativity and adaptability

About 23 percent of the organisations have a high (>= 80) culture index for the agility and innovation driver.



Insights

What is working well?

- Learning and experimentation**
Employees are encouraged to learn, experiment and embrace failure as part of the innovation process.
- Encouragement of new ideas**
Leadership values and encourages fresh ideas, empowering employees to drive change.

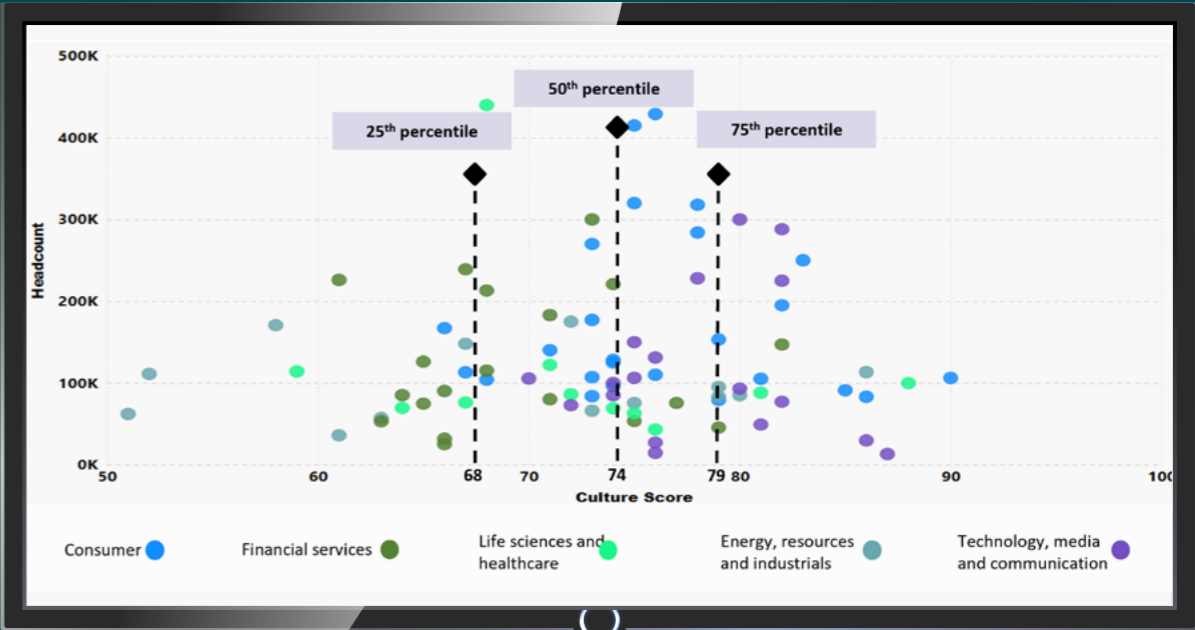


What is overlooked?

- Bureaucratic hurdles**
Excessive approval processes and slow decision-making hinder innovation.
- Resistance to change**
Established and rigid workflows make it difficult to implement new ideas and practices.
- Lack of investment in innovation**
Minimal investment in innovation and restrictive systems discourage creativity and progress.

Agility and innovation

Deep-dive across organisational distribution for agility and innovation pillar



The consumer and technology, media and communication industries are leading with a focus on innovation, strong customer relationships and adapting to trends quickly.



Energy, resources and industrials has the lowest minimum score and a relatively modest maximum, indicating industry dynamics of slower innovation and potential for growth and innovation.



25th percentile - 68
75th percentile - 79
The difference between the 75th and 25th is 11, which is the highest across all the pillars, indicating higher variability in agility and innovation across GCCs.

Industry deep-dive



Technology, media and communication: Industry deep-dive

Inclusion, transparent practices and management support foster empowerment, enabling employees to contribute meaningfully

About 83 percent of the organisations have a high (≥ 80) culture index for the technology, media and communication industry



Technology, Media and Communication: Industry culture index

“ Culture index distribution ”

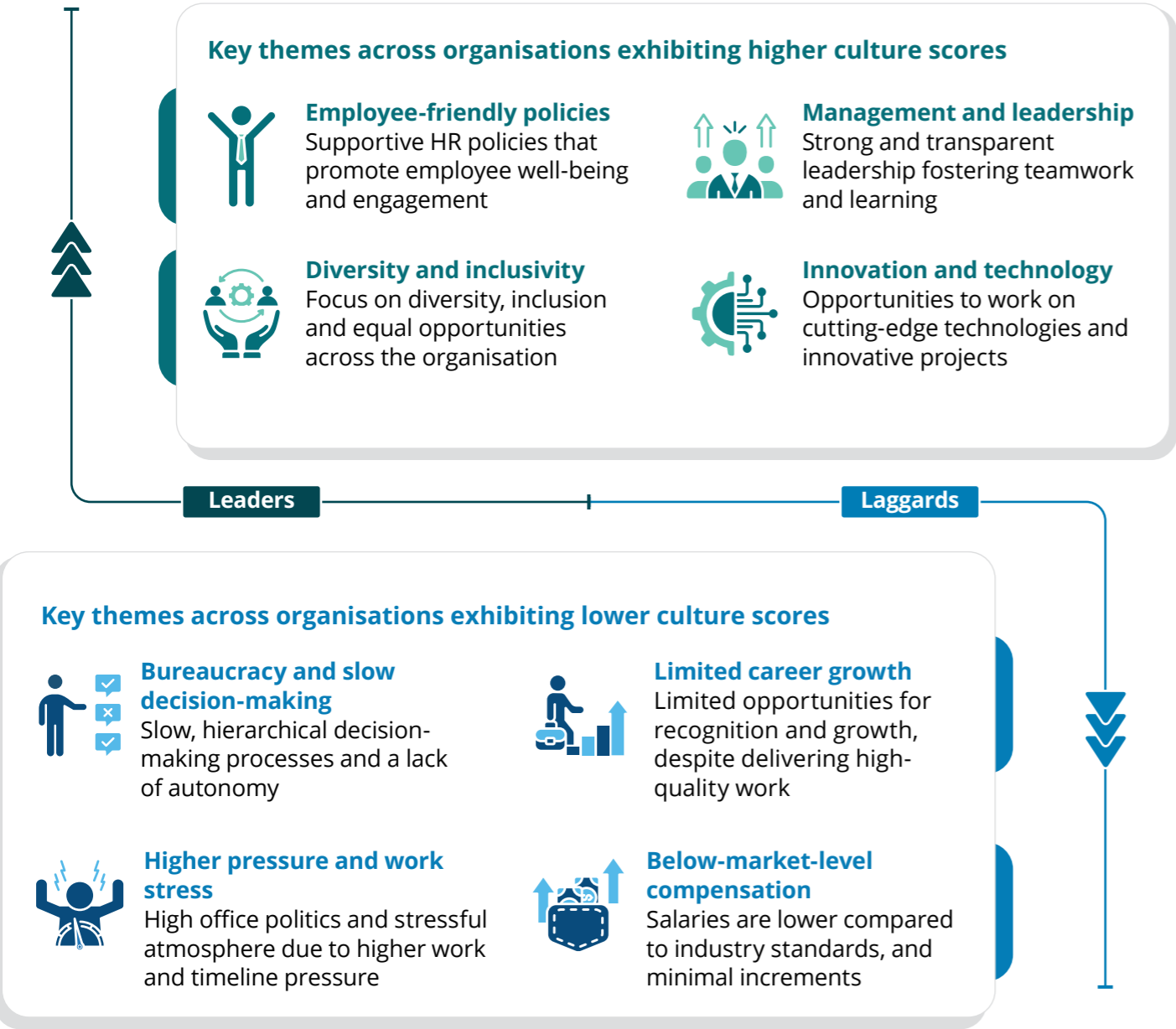
The technology, media, and communication industry exhibits strong consistency with a narrow range of 12 and a median of 82, indicating a stable performance among the majority.

Maximum	75 th percentile	50 th percentile	25 th percentile	Minimum
90	84	82	81	78



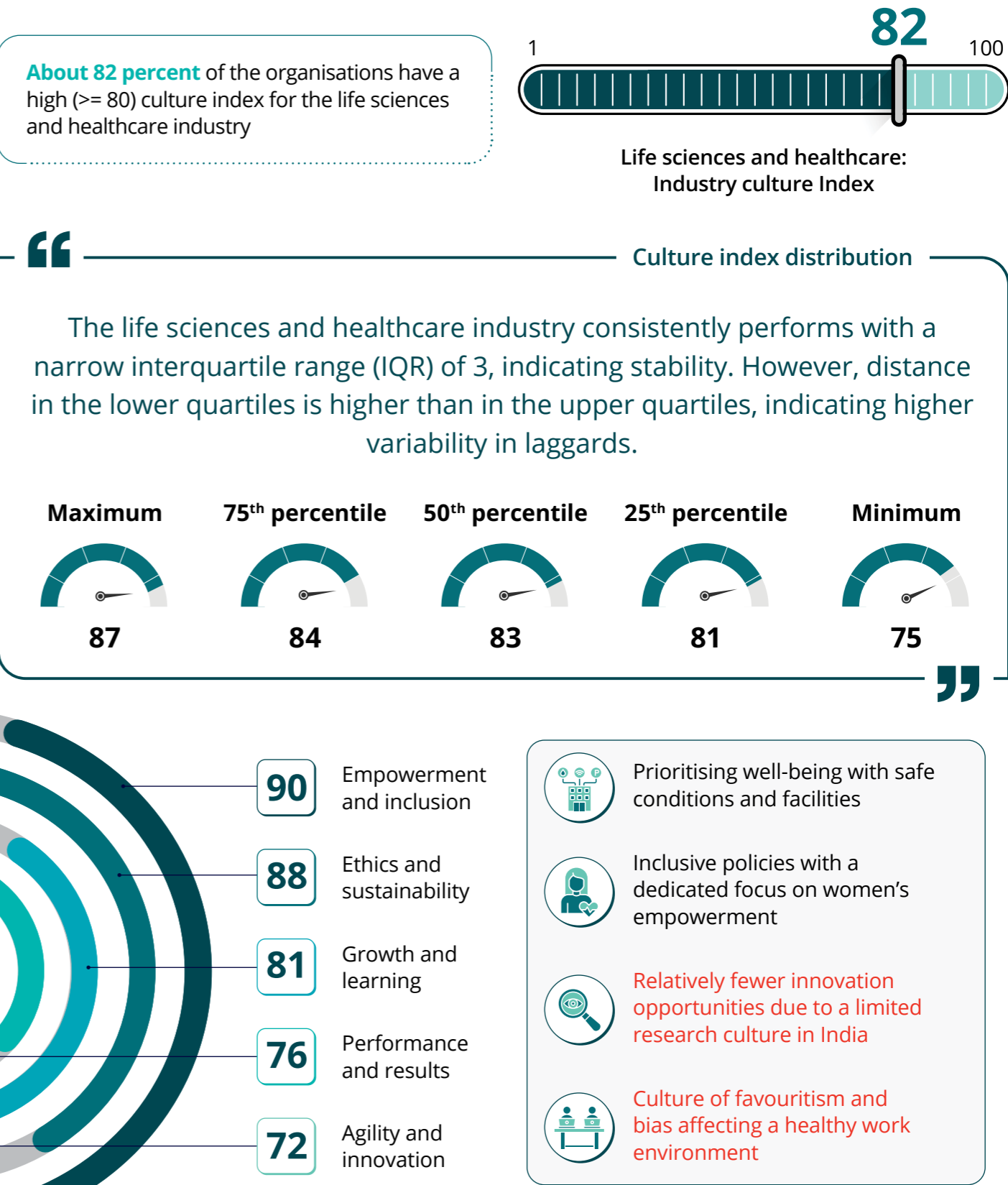
Technology, media and communication: Key culture differentiators

Let's explore the top practices behind high culture scores and the challenges causing low employee perceptions



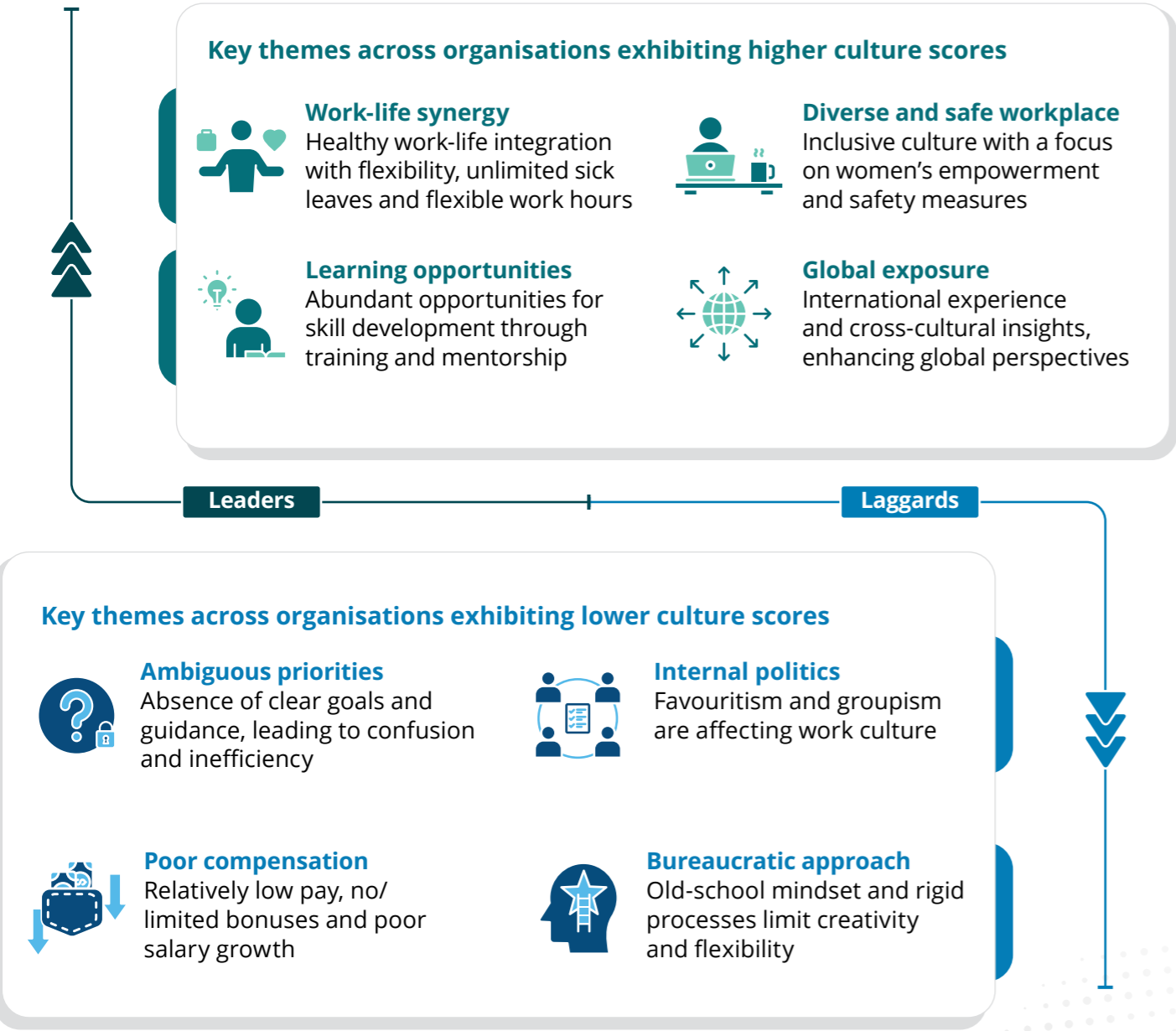
Life sciences and healthcare: Industry deep-dive

An inclusive and ethical workplace culture drives positive sentiment, while negative sentiment is driven by limited innovation and research opportunities



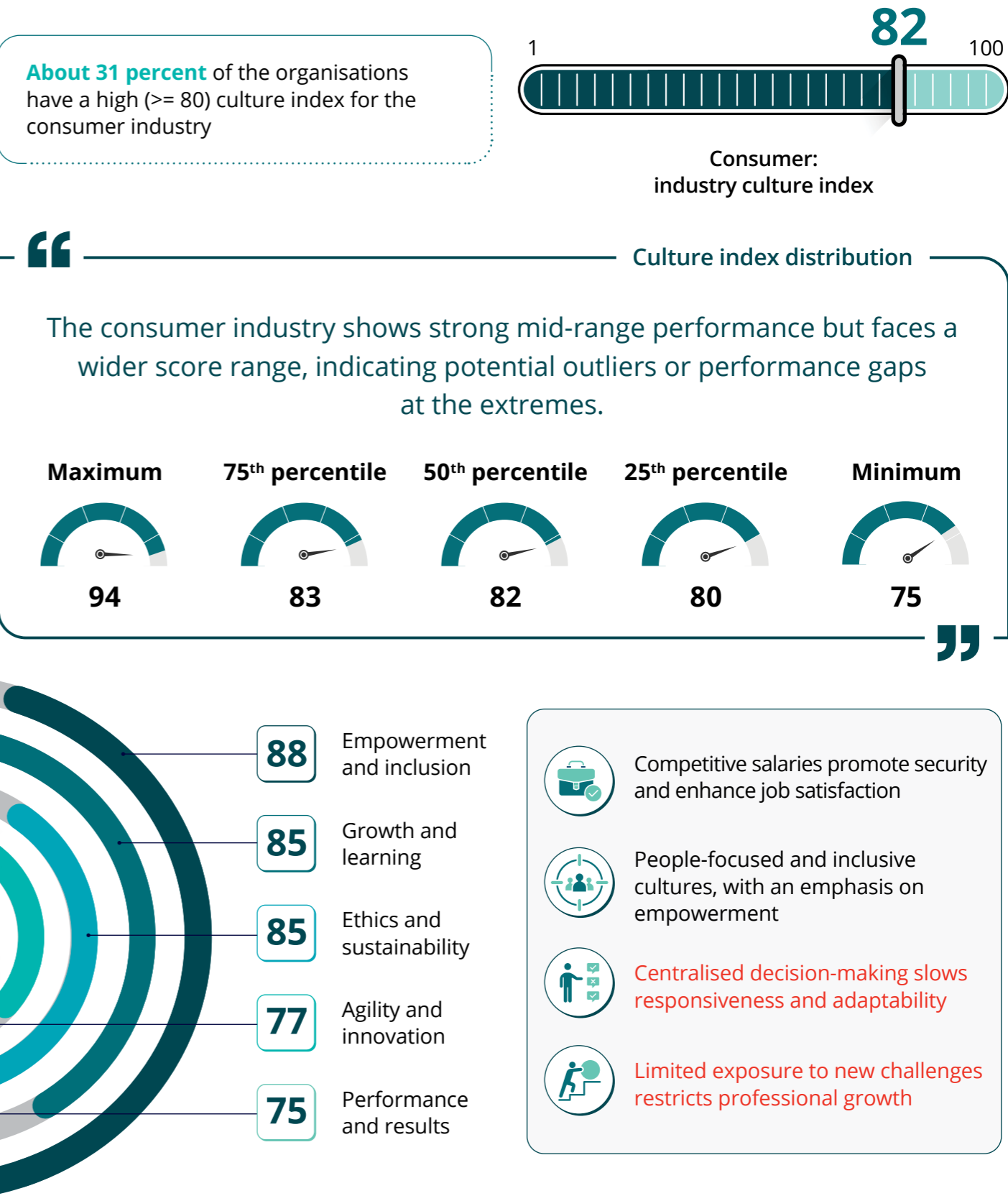
Life sciences and healthcare: Key culture differentiators

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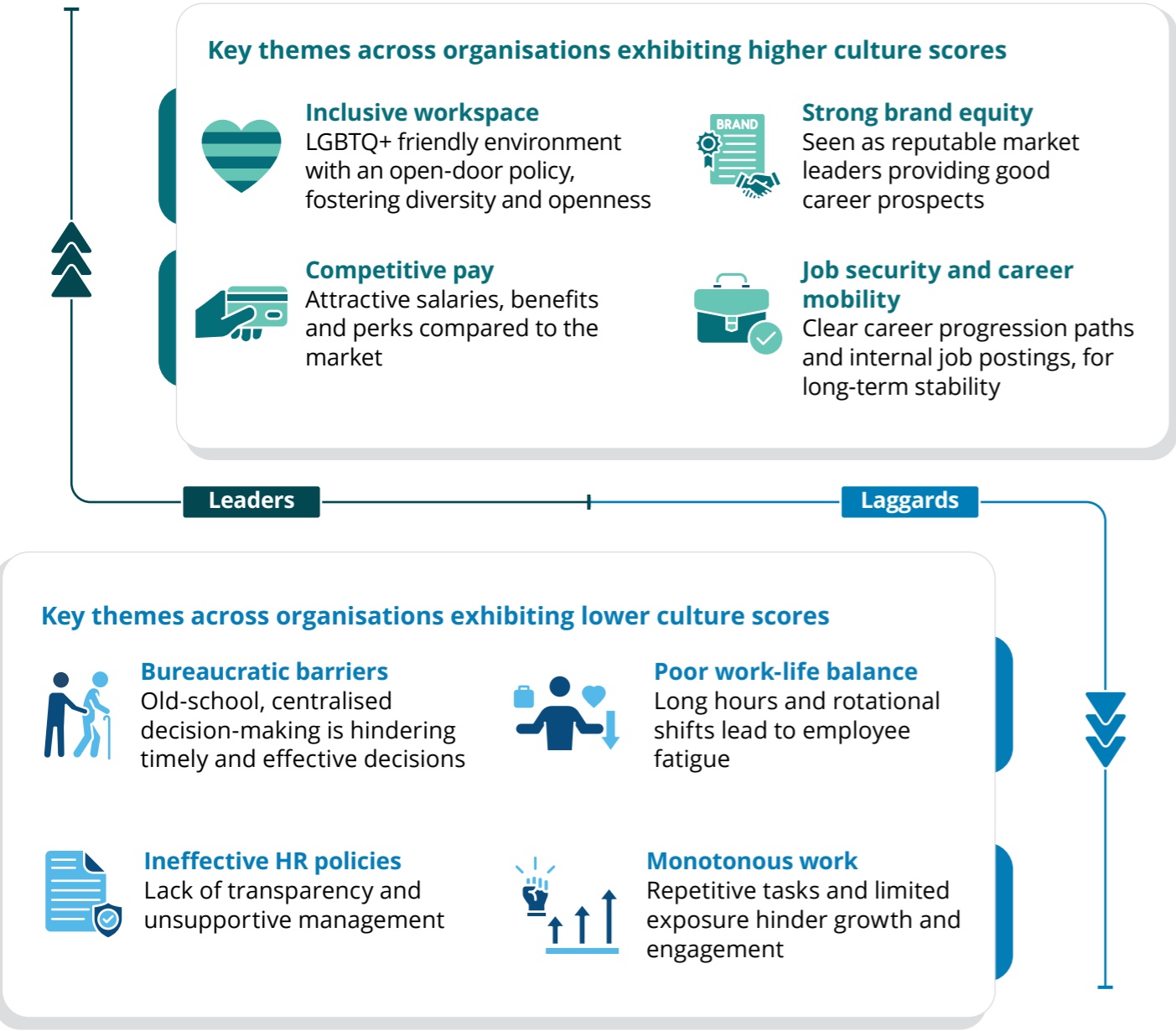
Consumer: Industry deep-dive

Strong employer branding and inclusive policies cultivate a welcoming and equitable workplace



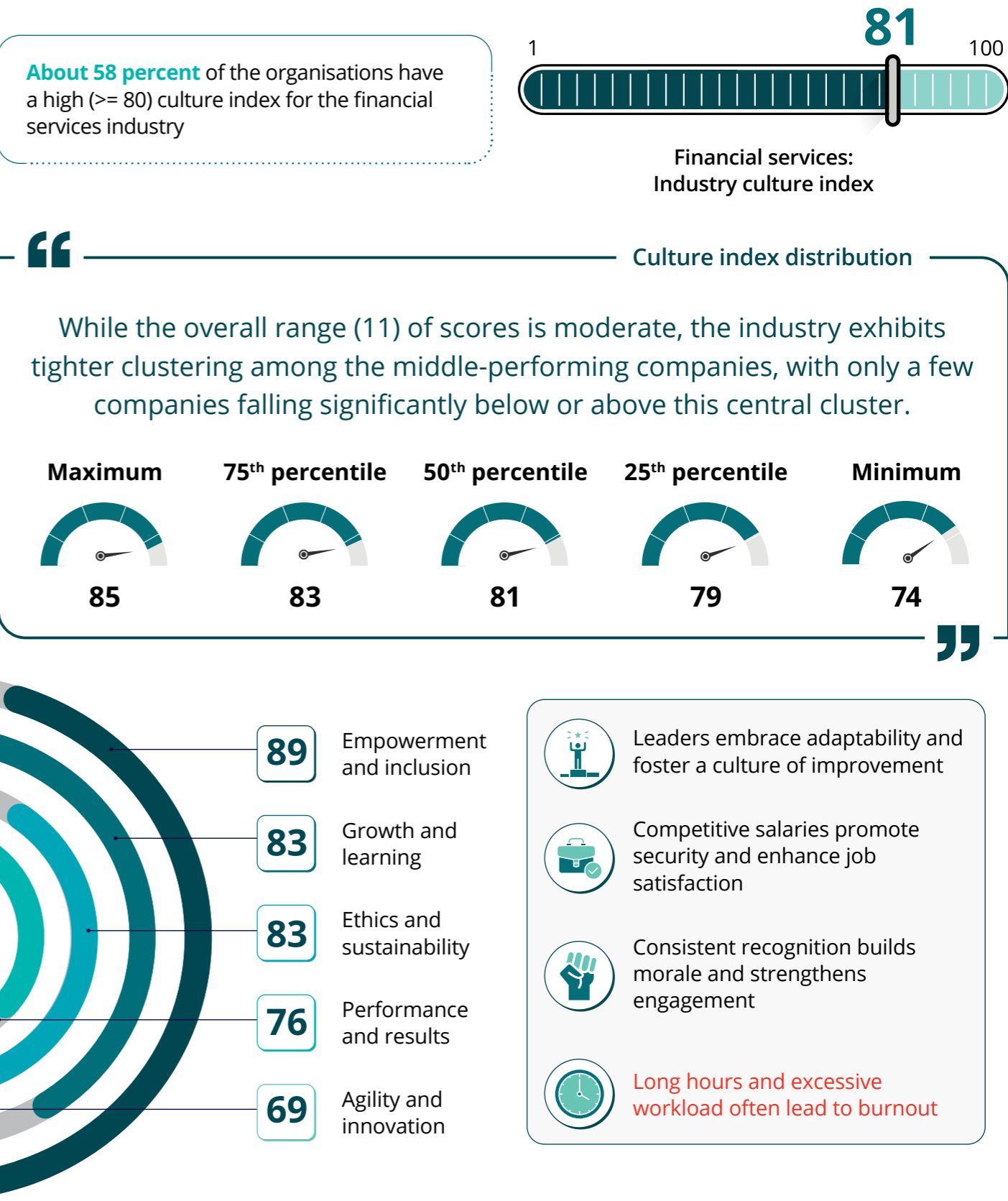
Consumer: Key culture differentiators

Let's explore the top practices behind high culture scores and the challenges causing low employee perceptions



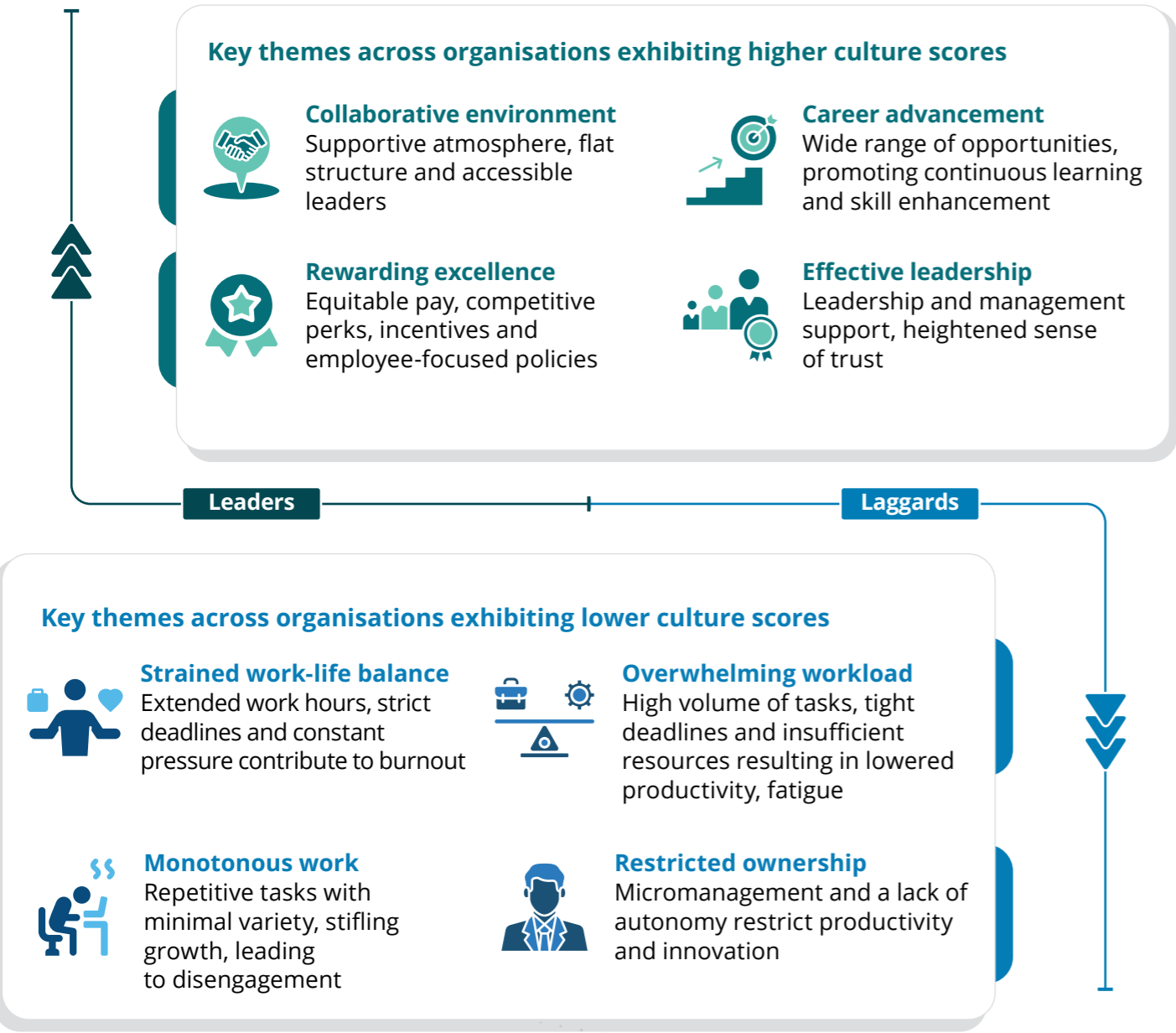
Financial services: Industry deep-dive

Effective leadership and opportunities for continuous learning are driving a culture of growth and excellence; however, poor work-life balance remains a key concern



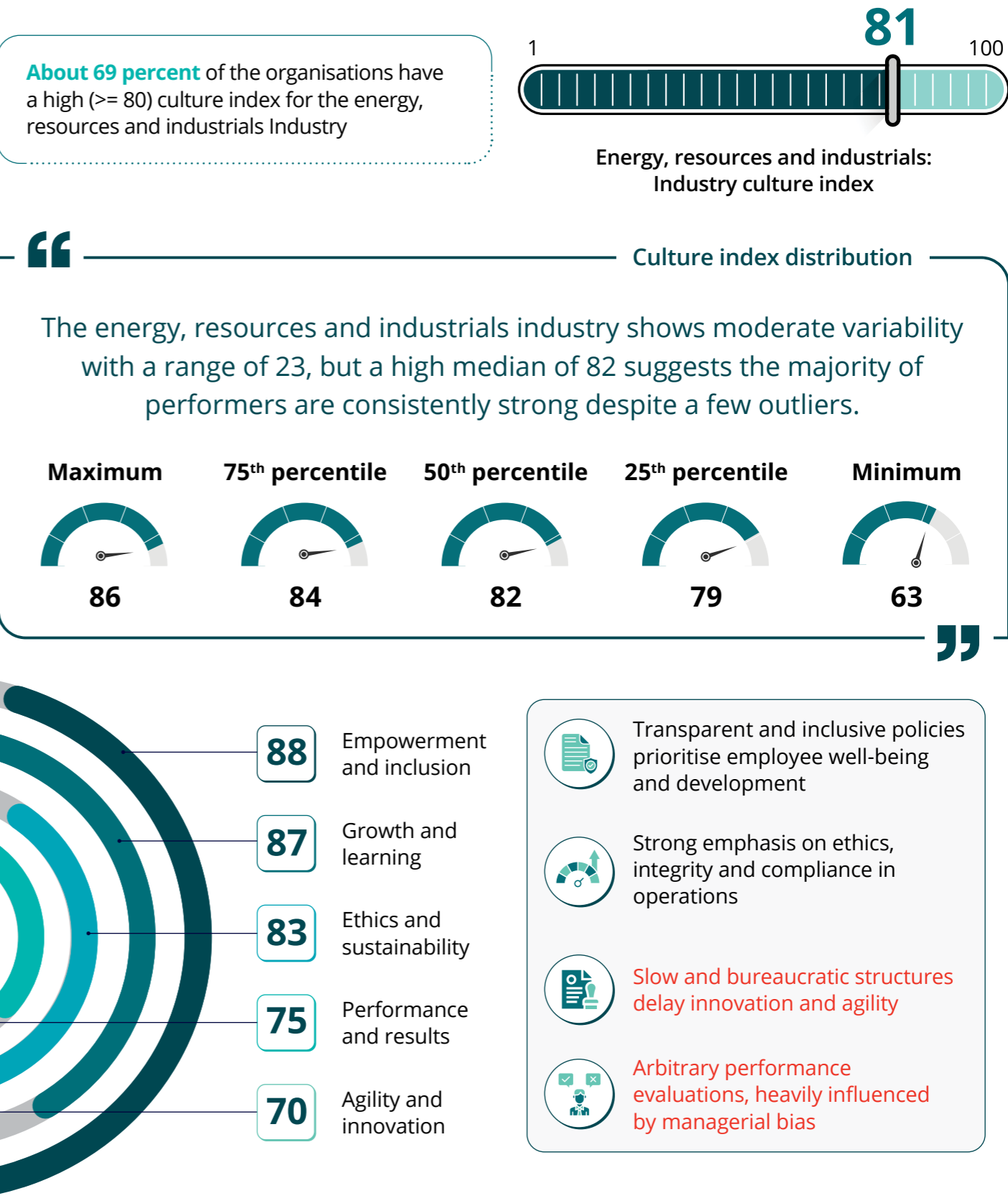
Financial services: Key culture differentiators

Let's explore the top practices behind high culture scores and the challenges causing low employee perceptions



Energy, resources and industrials: Industry deep-dive

Commitment to innovation, cutting-edge technology and career growth is driving industrial success



Energy, resources and industrials: Key culture differentiators

Let's explore the top practices behind high culture scores and the challenges causing low employee perceptions



Conclusion and way forward



Conclusion and way forward

Focusing on the following aspects can help enhance employee perception and satisfaction across organisations and industries



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