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India GCC culture sensing report

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

Table of contents

| oreword | 2 |
|--------------------------------|----|
| analysis framework and scope | 6 |
| ndia GCC culture index | 9 |
| Deep-dive into culture drivers | 13 |
| ndustry deep-dive | 24 |
| Conclusion and way forward | 35 |
| Connect with us | 38 |

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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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

Fundamental culture drivers

damental

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.

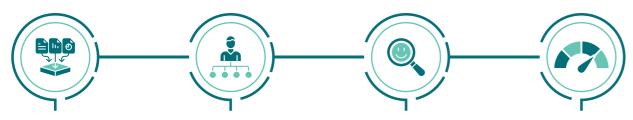


Performance and results

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

Methodology overview

An Al-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 Al-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

(# of positive reviews-# of negative reviews) / Total # of reviews

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

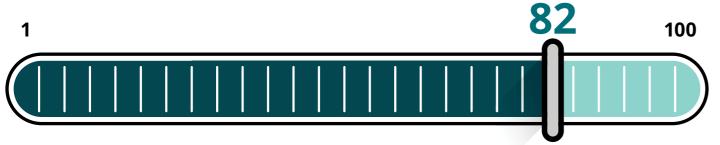


India GCC culture index



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



India Culture Index*

Empowerment and inclusion



- Inclusive workplace and focus on employee well-being
- **Supportive** colleagues and managers

Ethics and sustainability



- High focus on employee welfare
- High work ethics with a **strong** cultural foundation

- Lack of recognition for contributions

- Lack of HR support and ineffective processes





Culture driver index

Growth and learning



- Good learning and training opportunities
- Career growth with exposure to multiple roles and challenging problems
- Promotions prioritise seniority over merit
- Limited access to latest tools and tech



Performance and results



- Merit-based rewards and performance recognition
- **Job security** and clear career paths
- Non-competitive salaries and poor bonuses
- Bureaucratic environment with politics and favouritism



Agility and innovation



- Freedom to explore **new** methods and tools
- Good exposure to challenging projects
- Bureaucracy and resistance to change create bottlenecks to implement new ideas and solutions.
- Minimal investment in the latest innovations



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

| | Technology, media and communication | Life sciences and healthcare | Consumer | Financial services | Energy, resources and industrials |
|---------------------------|---|---------------------------------|----------|-----------------------|---|
| | 83 | 82 | 82 | 81 | 81 |
| Empowerment and inclusion | 90 | 90 | 88 | 89 | 88 |
| Ethics and sustainability | 87 | 88 | 85 | 83 | 87 |
| Growth and learning | 87 | 81 | 85 | 83 | 83 |
| Performance and results | 76 | 76 | 75 | 76 | 75 |
| Agility and innovation | 78 | 72 | 77 | 69 | 70 |



Key highlights

practices · Culture of continuous

learning

Inclusive

friendly

and LGBTQ+

- Promotes women empowerment
- HR support
- · Ethical and people-focused culture
- · Good work-life Relatively balance and competitive salary and job satisfaction
- Competitive salary and benefits
- Consistent recognition and culture of improvement
- Transparent and inclusive policies
- Strong emphasis on ethics and compliance

- · Non-competitive salary, unrecognised efforts
- Excessive micromanagement limits innovation
- Limited innovation opportunities
- · Culture of favouritism and bias
- Limited exposure to new opportunities
- Bureaucratic
- Long work hours and excessive workload
- Micromanagement and lack of and centralised autonomy decision making
- Slow career progression, unfair promotion system
 - Slow and bureaucratic structures

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

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.



Empowerment and inclusion

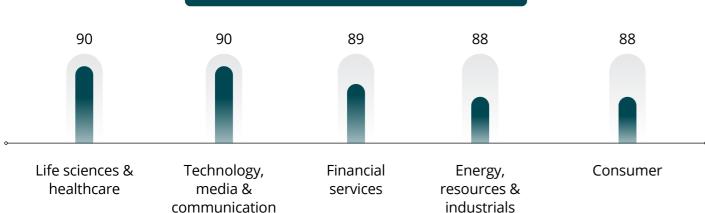
A high score reflects an inclusive, collaborative culture that boosts well-being and morale

About 95 percent of the organisations have a high (>= 80) culture index for the empowerment and inclusion driver



Empowerment and inclusion: Culture driver index

Culture driver index across five industries



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

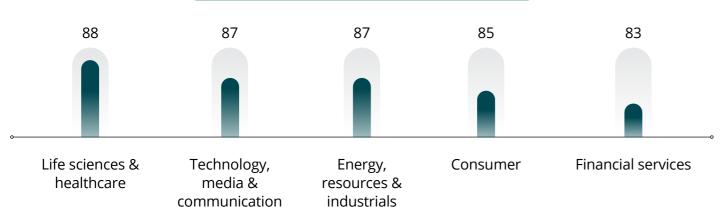
A higher score indicates adherence to responsible practices that uphold ethical standards and integrity

About 75 percent of the organisations have a high (>= 80) culture index for the ethics and sustainability driver.



Ethics and sustainability: Culture driver index

Culture driver index across five industries



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

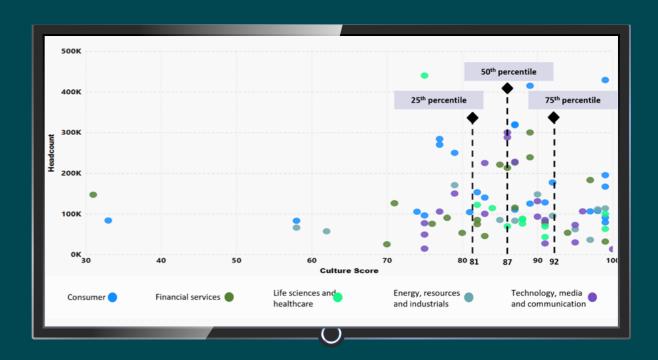
Employees perceive the leadership as ineffective and authoritarian.

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

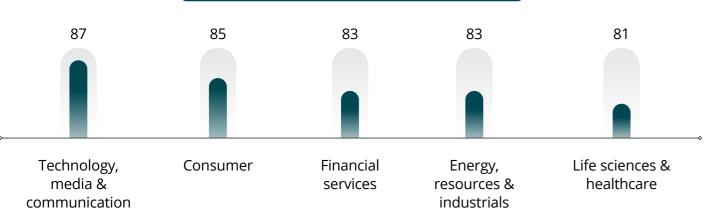
A higher score reflects ample personal and professional development opportunities provided through learning resources and mentorship

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



Growth and learning: Culture driver index

Culture driver index across five industries



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 meritbased 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.



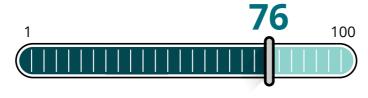
25th percentile - 81 75th percentile - 89

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

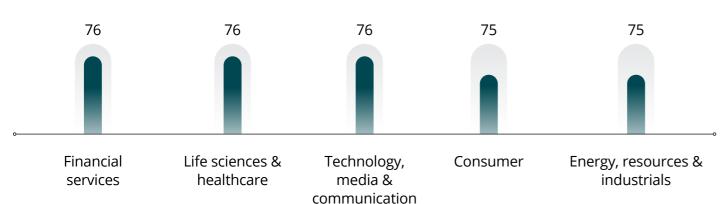
A lower score reflects challenges in compensation, culture and leadership affecting employee morale

About 19 percent of the organisations have a high (>= 80) culture index for the performance and results driver



Performance and results: Culture driver index

Culture driver index across five industries

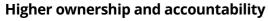


Insights

What is working well?

Performance-driven culture

Advancement, raises and bonuses are tied to performance, reflecting the performance-driven culture.



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.



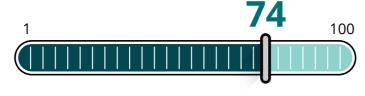
The life sciences and healthcare industry

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

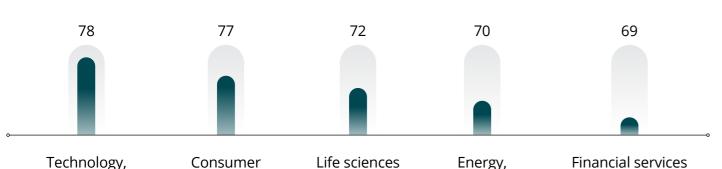
About 23 percent of the organisations have a high (>= 80) culture index for the agility and innovation driver.



Agility and innovation: **Culture driver index**

resources & industrials

Culture driver index across five industries



Insights

& healthcare

What is working well?

media &

communication

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

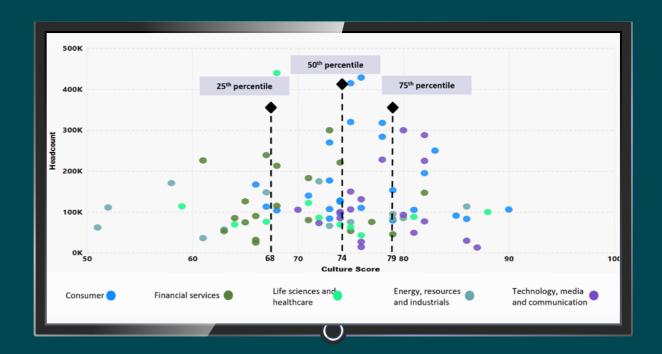
Established and rigid workflows make it difficult to implement new ideas and practices.

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



Energy, resources and 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

- 66

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



Employee-friendly and inclusive policies and practices



Encouragement and guidance for continuous learning in a collaborative setting



Excessive micromanagement stifles creativity and innovation within teams



Uncertainty around job security and lack of clarity affect performance outcomes



Technology, media and communication: Key culture differentiators

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

Key themes across organisations exhibiting higher culture scores



Employee-friendly policies Supportive HR policies that

promote employee well-being and engagement



Management and leadership

Strong and transparent leadership fostering teamwork and learning



Diversity and inclusivity

Focus on diversity, inclusion and equal opportunities across the organisation



Innovation and technology

Opportunities to work on cutting-edge technologies and innovative projects

Leaders

Laggards

Key themes across organisations exhibiting lower culture scores



Bureaucracy and slow decision-making

Slow, hierarchical decisionmaking processes and a lack of autonomy



Limited career growth

Limited opportunities for recognition and growth, despite delivering highquality work



Higher pressure and work stress

High office politics and stressful atmosphere due to higher work and timeline pressure



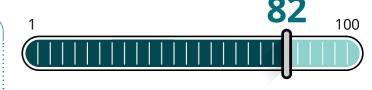
Below-market-level compensation

Salaries are lower compared to industry standards, and minimal increments

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

About 82 percent of the organisations have a high (>= 80) culture index for the life sciences and healthcare industry



Life sciences and healthcare: **Industry culture Index**

Culture index distribution

The life sciences and healthcare industry consistently performs with a narrow interquartile range (IQR) of 3, indicating stability. However, distance in the lower quartiles is higher than in the upper quartiles, indicating higher variability in laggards.

75th percentile 50th percentile 25th percentile Maximum Minimum 83







Prioritising well-being with safe conditions and facilities



Inclusive policies with a dedicated focus on women's empowerment



Relatively fewer innovation opportunities due to a limited research culture in India



Agility and

innovation

Culture of favouritism and bias affecting a healthy work environment

Life sciences and healthcare: Key culture differentiators

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



Key themes across organisations exhibiting lower culture scores



Ambiguous priorities

Absence of clear goals and guidance, leading to confusion and inefficiency



Internal politics

Favouritism and groupism are affecting work culture



Poor compensation

Relatively low pay, no/ limited bonuses and poor salary growth



Bureaucratic approach

Old-school mindset and rigid processes limit creativity and flexibility

Consumer: Industry deep-dive

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

About 31 percent of the organisations have a high (>= 80) culture index for the consumer industry



industry culture index

Culture index distribution

The consumer industry shows strong mid-range performance but faces a wider score range, indicating potential outliers or performance gaps at the extremes.

75th percentile 50th percentile 25th percentile Minimum Maximum 82







Competitive salaries promote security and enhance job satisfaction



People-focused and inclusive cultures, with an emphasis on empowerment



Centralised decision-making slows responsiveness and adaptability



Limited exposure to new challenges restricts professional growth

Consumer: Key culture differentiators

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



Key themes across organisations exhibiting lower culture scores



Bureaucratic barriers

Old-school, centralised decision-making is hindering timely and effective decisions



Poor work-life balance

Long hours and rotational shifts lead to employee fatigue



Ineffective HR policies

Lack of transparency and unsupportive management



Monotonous work

Repetitive tasks and limited exposure hinder growth and engagement

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

About 58 percent of the organisations have a high (>= 80) culture index for the financial services industry



Culture index distribution -

Industry culture index

While the overall range (11) of scores is moderate, the industry exhibits tighter clustering among the middle-performing companies, with only a few companies falling significantly below or above this central cluster.

75th percentile 50th percentile 25th percentile Maximum Minimum **79**







Leaders embrace adaptability and foster a culture of improvement



Competitive salaries promote security and enhance job satisfaction



Consistent recognition builds morale and strengthens engagement



Long hours and excessive workload often lead to burnout

Financial services: Key culture differentiators

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

Key themes across organisations exhibiting higher culture scores



Collaborative environment

Supportive atmosphere, flat structure and accessible leaders



Career advancement

Wide range of opportunities, promoting continuous learning and skill enhancement



Rewarding excellence

Equitable pay, competitive perks, incentives and employee-focused policies



Effective leadership

Leadership and management support, heightened sense of trust

Leaders

Laggards

Key themes across organisations exhibiting lower culture scores



Strained work-life balance

Extended work hours, strict deadlines and constant pressure contribute to burnout



Overwhelming workload

High volume of tasks, tight deadlines and insufficient resources resulting in lowered productivity, fatigue





Monotonous work

Repetitive tasks with minimal variety, stifling growth, leading to disengagement



Restricted ownership

Micromanagement and a lack of autonomy restrict productivity and innovation

Energy, resources and industrials: Industry deep-dive

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

About 69 percent of the organisations have a high (>= 80) culture index for the energy, resources and industrials Industry



Energy, resources and industrials: Industry culture index

Culture index distribution -

The energy, resources and industrials industry shows moderate variability with a range of 23, but a high median of 82 suggests the majority of performers are consistently strong despite a few outliers.

75th percentile 50th percentile 25th percentile Maximum Minimum 82 **79** 86







Transparent and inclusive policies prioritise employee well-being and development



Strong emphasis on ethics, integrity and compliance in operations



Slow and bureaucratic structures delay innovation and agility



Arbitrary performance evaluations, heavily influenced by managerial bias

Energy, resources and industrials: Key culture differentiators

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

Key themes across organisations exhibiting higher culture scores



Supportive work culture

Caring and inclusive environment where leadership is approachable and encouraging



Access to technology

Access to modern technologies that facilitate professional growth and innovation



Transparency and strong policies

Clear policies and employee-focused practices



Career development and growth

Opportunities for skill improvement and career advancement

Leaders

Laggards

Key themes across organisations exhibiting lower culture scores



Inefficient and biased management

Favouritism, lack of technical expertise and unfair appraisal systems



Work-life Imbalance

Long working hours, pressure to over-deliver and lack of flexibility



N X

Poor quality of projects

Subpar work assigned, often low-value tasks, especially in offshore locations



Inadequate compensation

Salaries below market standards with infrequent hikes



Conclusion and way forward

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



Build agile and lean structures and simple processes, promoting faster and efficient decision-making.



Promote and design holistic employee well-being initiatives by analysing patterns of micromanagement and workload/burnout.



Design a performance-linked reward and recognition structure to maximise employee satisfaction and minimise disparities.



Identify and eliminate unconscious bias across different organisational layers to promote transparent and unbiased talent processes and decision-making.



While ample learning opportunities exist, they can be enhanced with hyper-personalised skilling along latest innovation and research opportunities.



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