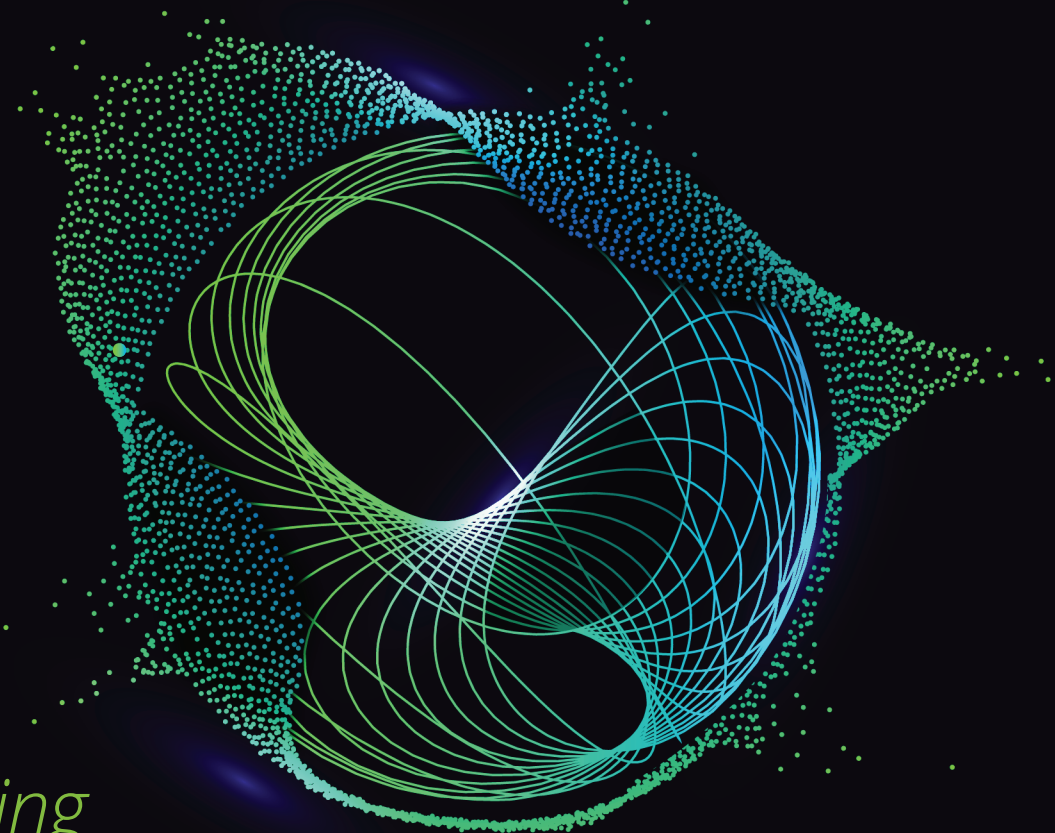


2025 Deloitte’s Global Business Services (GBS) Survey

Focused on Service Delivery Models – Global Capability Center/Shared Services Center, Center of Excellence, and Outsourcing



Key themes



GBS is prioritizing next-gen capability development and customer experience

~50% of organizations plan to prioritize **next-gen capabilities (such as GenAI, intelligent automation, etc.)**

Implementing these capabilities across various functions is perceived as critical to enhance efficiency, reduce costs, and improve scalability.

Enhancing GBS customer experience is becoming a top priority for organizations to deliver differentiated outcomes and build strong brands.

~35% of the survey respondents will be prioritizing customer experience over the next 3 years



Unified leadership delivers differentiated savings

~55% of organizations with a **Global GBS leader role have achieved more than 20% average savings** from their GBS operations emphasizing the importance of a global leader in unifying strategy and business outcomes



GenAI requires investment in data and security to scale value creation

~50% of organizations achieved over 20% savings from their GBS

66% of organizations have indicated plans to invest in GenAI automation over the next 3 years

Addressing



Data quality



Cyber-security



Governance challenges

will bridge the gap between expected and achieved savings from GenAI adoption, and move organizations toward greater value realization



Mexico and Portugal are gaining popularity

Mexico

rises to the **Top 3** GBS locations



Portugal

enters the **Top 10** in locations in 2025



India, US, and Poland

consistently rank among the top GBS locations over the last few years with India leading servicing across functions



Demand for skilled talent and a hybrid working model is mainstream

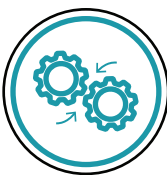
Top talent challenges



Recruiting talent with the right skills



Building GBS brands



Bridging skill and capability gaps

Key talent retention strategies



Culture



Compensation

Over

50%

of GBS organizations leverage a **hybrid working model**, requiring employees to be in office for 1 to 3 days per week