

Global Competency Center (GCC) Services 2025 Market Insights™

Driving Enterprise Value Creation
Through GCC Transformation

August 2025

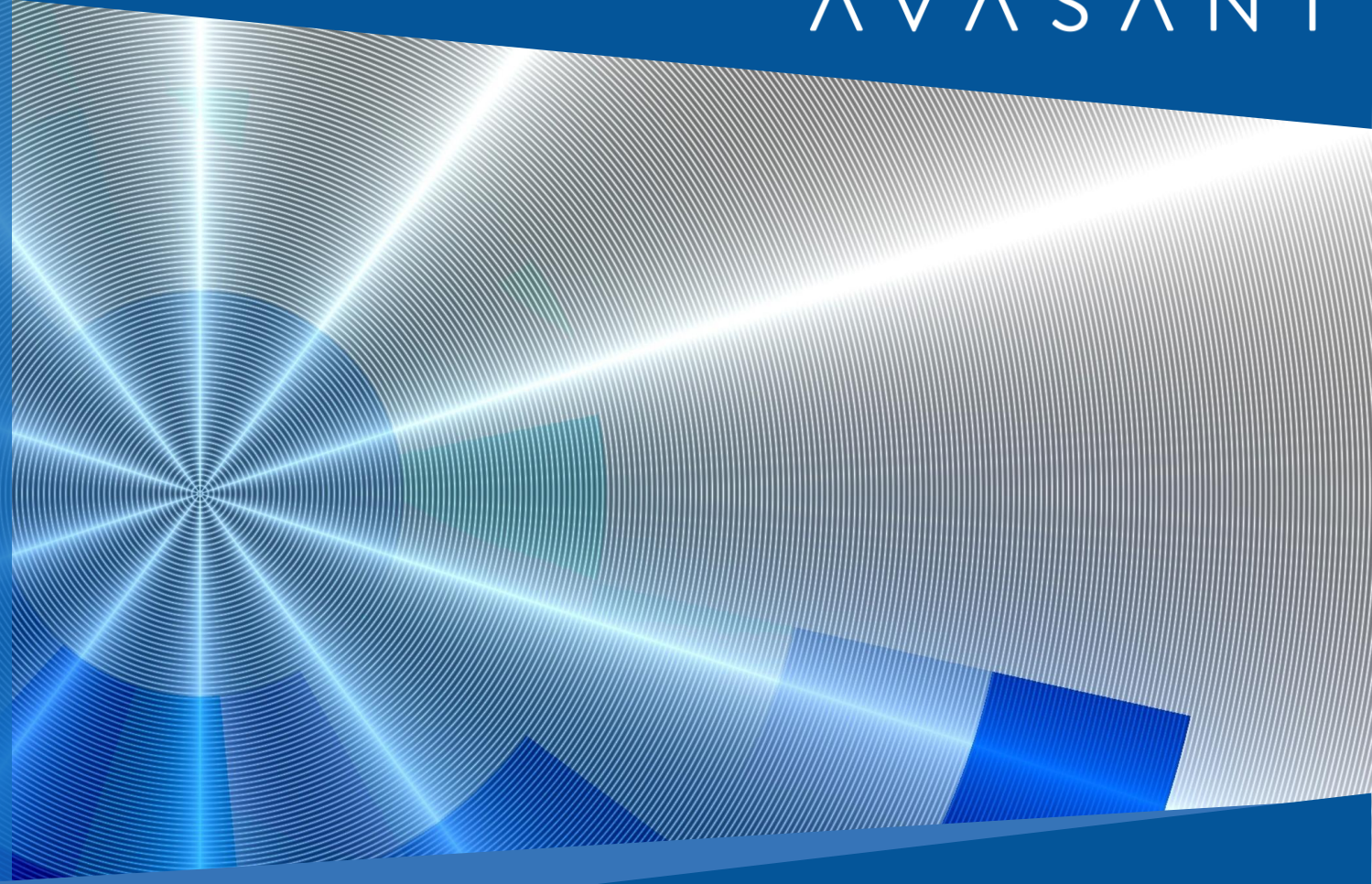


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Key GCC trends shaping the market

Global market trends

Growth & Untapped Potential



GCCs have grown by ~10% in the last three years, yet significant untapped potential remains

Implications

- The GCC landscape has experienced consistent growth in new setups and expansions over the past three years, with ~18% increase in headcount.
- Currently, 400 out of the Forbes Global 2000 companies have established GCCs in India, indicating untapped headroom in the market, especially as enterprises recognize the value of GCCs for innovation.

Asset Monetization



Enterprises reposition mature GCCs for strategic asset monetization

- As GCCs mature, they become more valuable to their parent firms. However, if they only focus on streamlining costs and achieving operational goals, they might be seen as assets to be monetized.
- Consequently, GCC leaders are focusing on becoming multi-function, owning core processes, and increasing focus on driving enterprise wide innovation and transformation.

Innovation Focus & Digital Shift



GCCs are shifting their focus towards innovation, moving beyond traditional cost benefits

- A clear trend shows that GCCs are heavily investing in innovation, with 52% of job openings in the top 20 mature GCCs now requiring innovation skills. This is a higher demand than for standard process roles.
- The focus on innovation is further underscored by the fact that over half of GCCs (51.5% combined) are now concentrating on digital (24.3%) and ER&D (27.2%) capabilities, with a particular rise in demand for AI/ML roles, reflecting their evolution into innovation hubs.

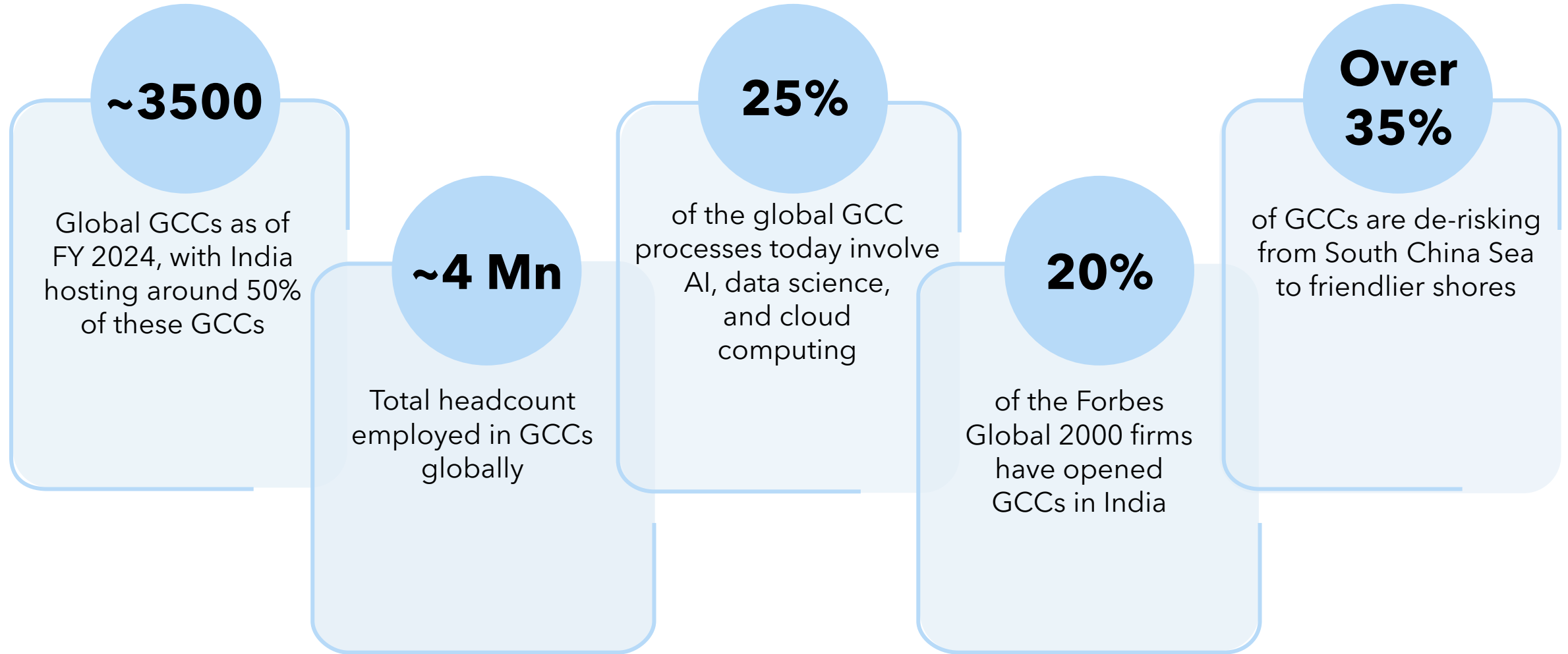
Collaborative Ecosystem



GCCs and service providers' collaborations are increasing; it isn't a zero-sum game

- GCCs are increasingly partnering with service providers for specialized skills and advanced tech such as AI/ML and cloud, accelerating their innovation without heavy in-house investment.
- Collaboration enables GCCs to quickly scale operations up or down, while providers gain stable partnerships.

Enterprises across the world are leveraging Global Competency Centers (GCCs) to scale smarter, innovate faster, and grow stronger



Source: Avasant Research, Avasant GCC Intelligence Platform

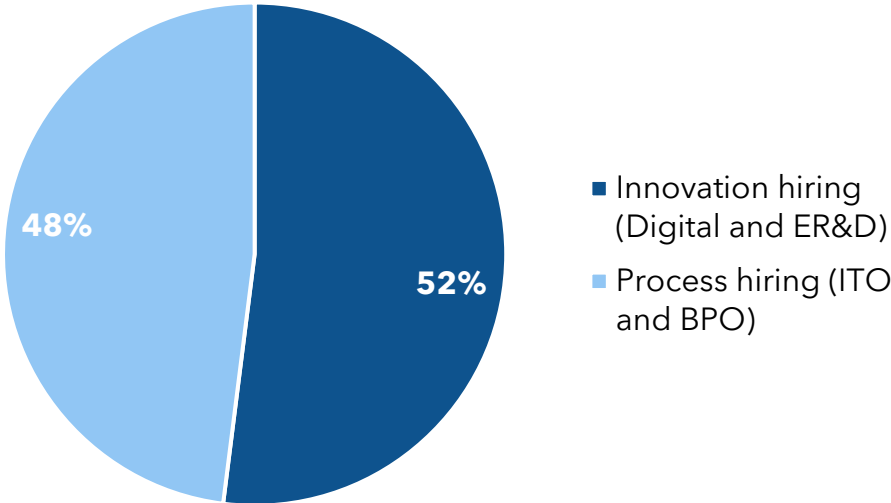
To align with the new innovation imperative, GCCs are expanding their talent pools by actively hiring for dedicated innovation roles

Mature GCCs are increasing their focus on innovation

	Cost & Efficiency	Process & Talent	Innovation
Greenfield setup	46%	33%	21%
Brownfield (0 - 2 years) - Young GCCs	34%	39%	27%
Brownfield (2-7 years) - Growing GCCs	31%	47%	22%
Brownfield (7+ years) - Mature GCCs	21%	38%	41%

Note: These percentages indicate the primary focus areas for GCCs at different stages of their maturity.

Distribution of hiring at the top 20 Mature GCCs



Note: This chart illustrates the distribution of hiring priorities within the top 20 Mature GCCs

Source: GCC and Parent Executive interviews, GCC Career portals



Pyramid Consulting Profile

Pyramid Consulting/Celsior: RadarView profile



Practice maturity ★★★★★

Partner ecosystem ★★

Investments & innovation ★★

Delivers GCC services leveraging hyperscaler partnerships, certified talent, Gen AI assets, and global university alliances.

*LMS: Learning management system
*P&C: Property and Casualty

Practice overview

- Practice size: 800+
- Active clients: 14+
- Delivery highlights: Around 22 delivery centers providing services to global competency center (GCC) clients across 18 countries

< USD 50M

Revenue from GCC services, FY 2024

~20%

Growth rate of GCC services revenue, FY 2024

Key IP and assets

- ExemptSmart: An AI-driven compliance tool for automating employee exemption classification
- PayPrism: A Gen AI-powered solution for streamlining onboarding, payroll, and compliance processes
- Hoonr: A skills-first talent platform delivering pre-vetted, outcome-focused resources
- Brainery: An AI-powered LMS* enabling personalized training, upskilling, and skills gap analysis

Client case studies

- Digitized a fintech's product development by deploying Agile squads, AI-driven automation, and continuous modernization in its GCC. This led to 60% rework reduction, faster time-to-market, IP reuse, reduced tech debt, and improved developer efficiency.
- Established a data hub in the GCC of a life insurer by integrating disparate data sources through advanced cleansing and analytics tools. This led to faster insights, reduced redundancy, and high-quality data, empowering better decisions across finance, marketing, and agent commissions.
- Helped scale a 50-member quality engineering team to drive testing for a P&C* insurer, supporting Guidewire migration and digital transformation. This led to 80% time savings in data validation, defect reduction, and execution through AI-powered automation and frameworks.
- Established a GCC in India for a healthcare provider, optimizing its infrastructure support operations. By leveraging tailored training programs and compliance standards, the center ensured scalable, cost-effective delivery while building a sustainable talent pipeline.

Key partnerships



Sample clients

- A fintech
- A life insurer
- A P&C insurer
- A healthcare provider
- A furniture retailer
- An engineering firm
- A telecommunications firm
- A global airline
- A department store chain
- An IT systems integrator

Value Chain Coverage

Strategy and Design

Build

Transition

Operate

Scale and Transform

Digitalization

Darker color indicates higher industry concentration:



Pyramid Consulting/Celsior : RadarView profile

Analyst insights

Practice maturity



- Pyramid Consulting, with three decades of proven experience, offers GCC services supported by a global delivery network across the US, Canada, the UK, Europe, Australia, New Zealand, and Latin America. With over 35% of its revenue generated from operating GCC services, it serves all major industries through a strong local presence in Mexico, Costa Rica, India, and the Philippines, offering integrated HR, finance, and legal support.
- Its proprietary skills management platform, Hoonr, has a pool of pre-vetted skilled resource database that strengthens its BOT service offerings to GCCs. Its ROI Calculator is a predictive analytics-driven, interactive tool that helps GCC clients assess cost savings and efficiency gains from their GCC setup. Along with these tools, Pyramid Consulting is expanding its delivery centers across India and Mexico to strengthen its GCC offerings, focusing on scaling infrastructure, talent engineering, and recruitment capabilities to enhance delivery excellence.
- It has enhanced GCC offerings through proprietary assets such as Gen AI planning agents and digital twin frameworks to simulate and optimize GCC operations. Along with GCC Playbooks and CoEs in AI/ML, cloud, and automation, these help clients drive digital transformation and maximize GCC value realization.

Partner ecosystem



- Pyramid Consulting has built strong partnerships with hyperscalers such as Microsoft, Google Cloud, and AWS, supporting cloud infrastructure, AI/ML, and digital transformation initiatives for GCCs. It has certified over 100 employees on each platform to deliver specialized consulting, implementation, and CoE services.
- It strengthened its digital transformation capabilities by partnering with ServiceNow and Salesforce, offering consulting, implementation, and talent development for GCCs. It has trained over 70 employees on ServiceNow and over 100 employees on Salesforce solutions to support deployment and scalable initiatives.
- It partners with universities to enhance its GCC offerings, building new talent pools through collaborations with institutions such as Universidad Tecmilenio and Universidad de Guadalajara, in Mexico, along with leading universities in India and the US. This strengthens its access to early-career talent for GCCs.

Investments and innovation



- Pyramid Consulting is strengthening its GCC offerings through strategic acquisitions, such as of ProGrad in April 2025, enhancing its early-career talent pipeline in India and APAC. This helps its build and transition services by integrating ProGrad's skilling platform into Pyramid's talent transformation frameworks.
- It plans to invest over USD 1 million in FY 2025 to enhance its GCC offerings, with 20% allocated to R&D, 30% to human capital development, and 40% to practice growth. The focus areas include building AI-based solution accelerators, expanding recruitment capabilities, and investing in digital and automation services.
- It has deepened its technology expertise by investing in cloud-native architectures, platform engineering, Gen AI, and platforms tailored for GCCs. It has also invested in building a global talent engine with over 800 recruiters, offering flexible models such as TaaS* to meet the rising demand for cross-functional skills.

* TaaS: Terms as a Service

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