

# GCC Next – Cost to Value Creation

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adani

Growth  
with  
Goodness

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GCCs of Tomorrow





A Global Capability Center (GCC) is a strategic unit that supports an organization's global operations through technology, talent, and innovation.

**Global Capability Centers (GCCs)** are designed to leverage global talent pools and technological advancements to enhance organizational capabilities and drive business transformation. GCCs connect organizations to a global pool of top-tier talent, equipped with the latest technology and training needed to stay ahead of industry trends, continually innovate, and create sustained growth. These centers have evolved from being mere cost centers to strategic entities that significantly contribute to business growth and agility.

**GCCs** not only offer access to global, digital-first talent at scale but also serve as hubs where technology-enabled talent strategies are implemented to streamline processes and foster innovation. By harnessing the power of global talent and cutting-edge technology, GCCs deliver a wide range of services from IT and finance to customer service and R&D. Modern GCCs do much more than provide lower costs or a better back office—they help organizations digitalize faster, unlock value across the enterprise, and drive growth.

Global Capability Centers are instrumental in driving operational excellence and strategic growth. GCCs provide organizations with several benefits:



## Access to Talent:

Tapping into global talent pools to address skill shortages and enhance capabilities.



## Enhanced Quality and Productivity:

Through standardized processes and adoption of best practices.



## Innovation:

Serving as hubs for innovation, GCCs develop new solutions and services that can be scaled globally.

# The genesis of Indian GCC ecosystem truly began in 1990s



## 1990 – 1999

Streamlining processes and executing tasks efficiently while maintaining intellectual property and business knowledge within the organization.

## 2000 – 2010

Evolving from single capability centers to multi-capability hubs; building small, disparate capabilities and consolidating operations.

## 2011 – 2020

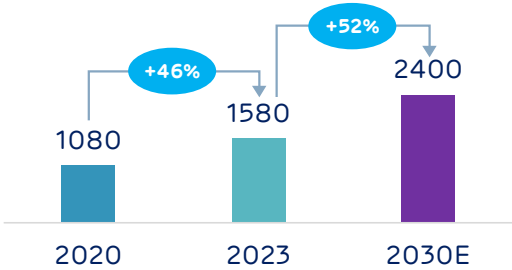
Integrating business, technology and corporate functions for added value. Adoption of digital technologies like social, mobile, cloud, and analytics to lead digital transformation.

## 2021 & beyond

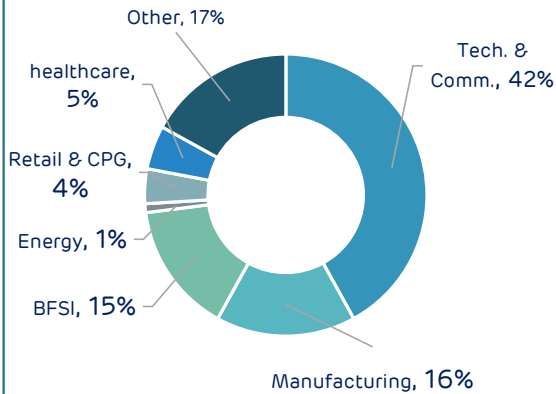
Achieving seamless integration with headquarters, evolving into 'digital twins'. Establishing hubs of creativity and ingenuity, setting up innovation labs and incubators. Leveraging a holistic ecosystem and integrating with startups.

# India's Rise as a Global Hub for GCC's

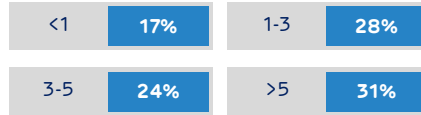
## Continued growth ahead



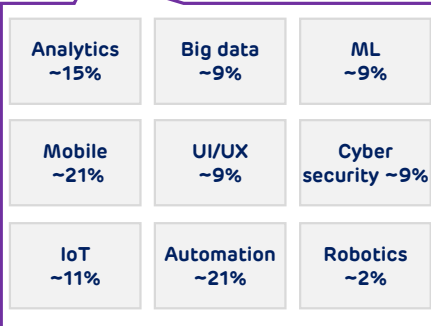
## Industry distribution



## Talent Snapshot Experienced profile (in yrs.)



**166K+** GCC Talent Pool with New-Age Tech skills



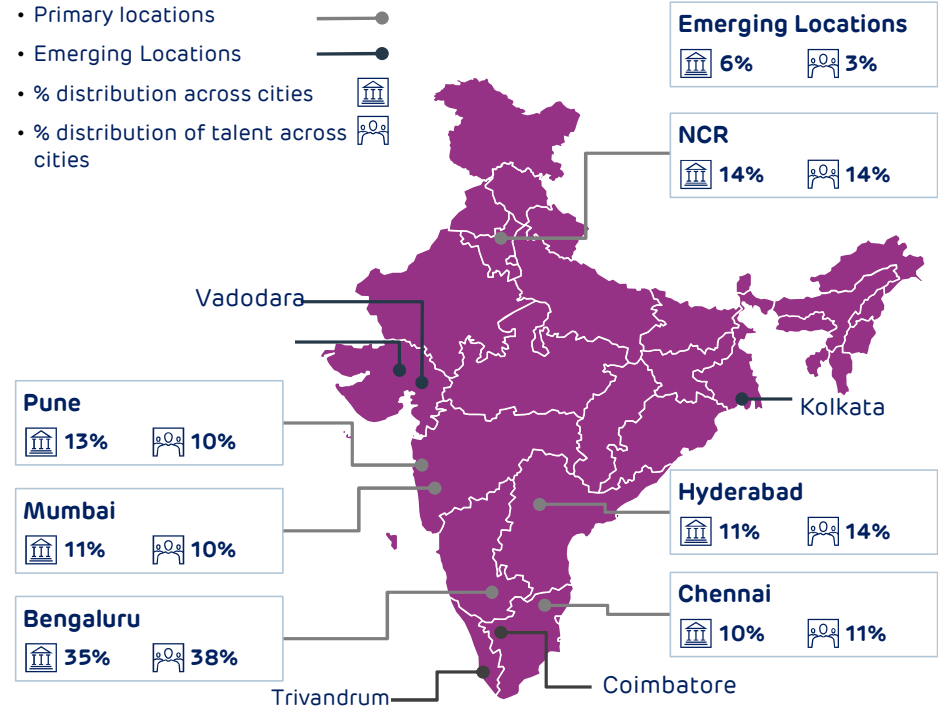
**2.6Mn** STEM graduates every year

**1113+** Higher Education (Universities)



India's IT spending in FY24 stands at \$138 billion  
3-4 times higher than in the U.S

- Primary locations
- Emerging Locations
- % distribution across cities
- % distribution of talent across cities



**> 1750** GCCs/GICs

**Talent Pool**  
~1.9Mn

**>\$64 Billion** Revenue

**> 100 CoEs** within GICs



## GCC Vision

To become India's most innovative and purpose-driven Digital GCC-redefining excellence in service, technology and transformation within three years.



## GCC Mission

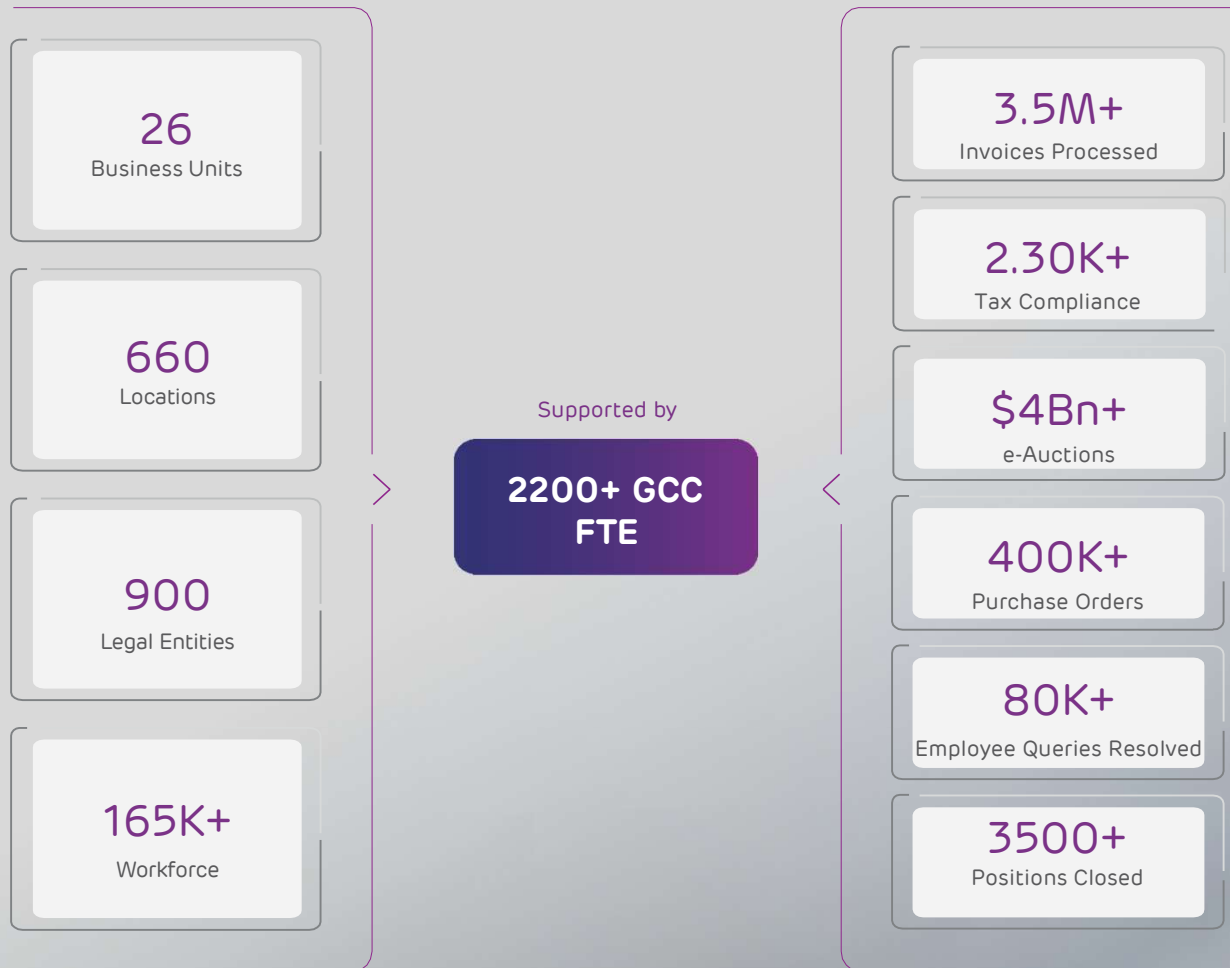
We empower our stakeholders by delivering exceptional digital services with integrity, agility and cost-efficiency, every single day.

## A Journey of Setting Up "Best in Context" for Adani Group

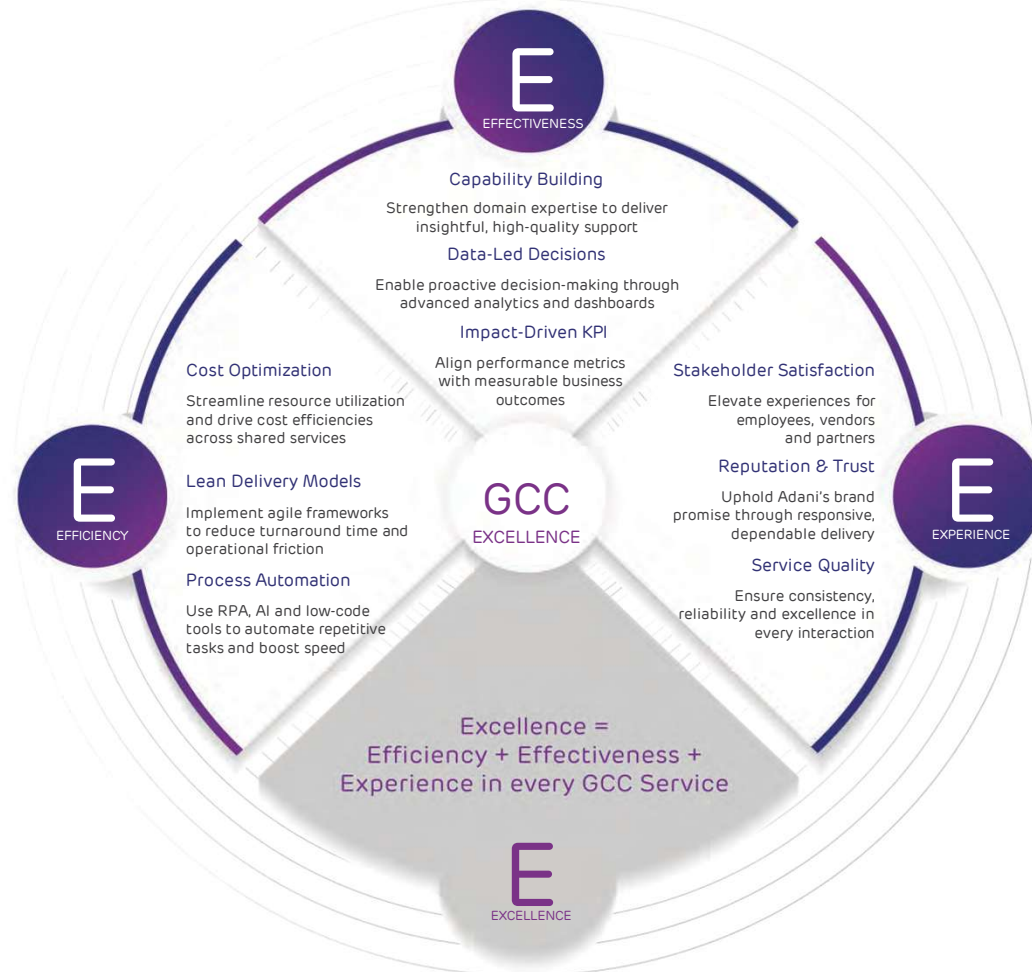
Unmatched Enormity & Complexity

Scale			Complexity			
Serving 165,000+ workforce			<b>GCC supports</b> <ul style="list-style-type: none"> <li>• 20%+ BAU Growth</li> <li>• New Businesses</li> <li>• M&amp;A Transactions</li> <li>• International Operations (Dubai, Australia)</li> <li>• ₹1.5L Cr Capex Annually</li> <li>• 4,600+ UJRs</li> </ul>	<b>Large &amp; fragmented technology landscape</b> <ul style="list-style-type: none"> <li>• Multiple SAP Instances</li> <li>• Oracle</li> <li>• Ariba</li> <li>• Kronos</li> <li>• ServiceNow etc.</li> </ul>	<b>Global industry-first strategic processes</b> <ul style="list-style-type: none"> <li>• FP&amp;A</li> <li>• Treasury/Cash Mgmt.</li> <li>• Finance Controllership</li> <li>• e-Auction</li> <li>• HR Site Operations</li> <li>• Executive Hiring</li> </ul>	<b>Record set-up time</b> <ul style="list-style-type: none"> <li>• 9 months for AGCC vs 18-24 months industry standard</li> </ul>
<b>26 BUs</b> across <b>650+</b> Sites	<b>900+</b> Legal Entities & <b>14</b> Listed Entities	<b>₹6L Cr</b> Asset Base				
<b>2200+ GCC Professionals across 3 Functions (Finance, HR, Procurement) and 18 Sub Towers</b>						
<b>1900+</b> People operating from Ahmedabad	<b>300+</b> People operating from site*					

## 2200+ FTE strong GCC supporting Adani Group



Adani GCC's 4E framework defines its strategic focus by integrating operational efficiency, business effectiveness, and stakeholder experience to drive transformation.



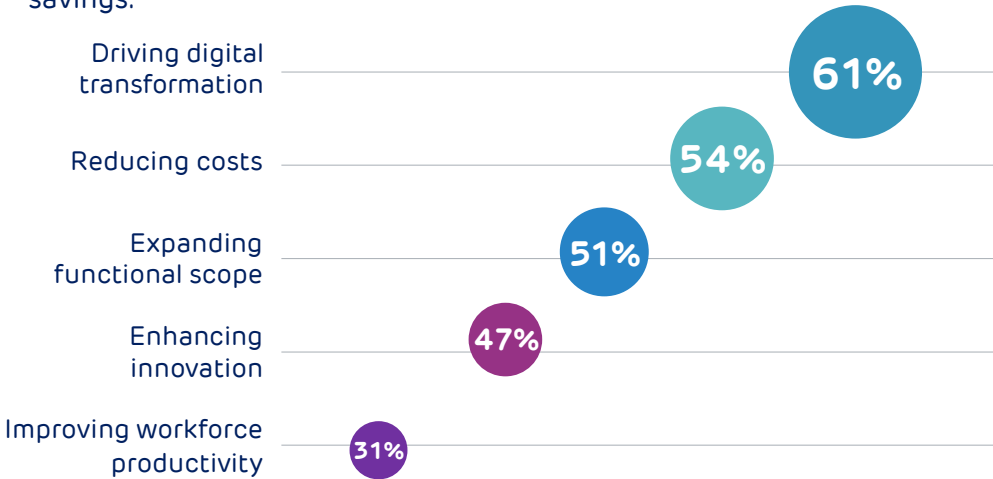
# GCC strategy and operating model



# GCC Strategy and Operating Model

## Key priorities

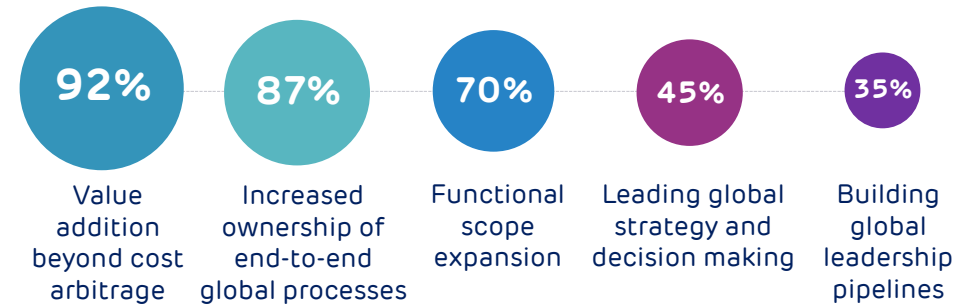
Digital transformation, fueled by AI adoption and end-to-end IP ownership, is the operational accelerator for competitive advantage, demanding tech-led growth and aggressive AI upskilling. The GCC's mandate is now moving towards innovation arbitrage, than just cost savings.



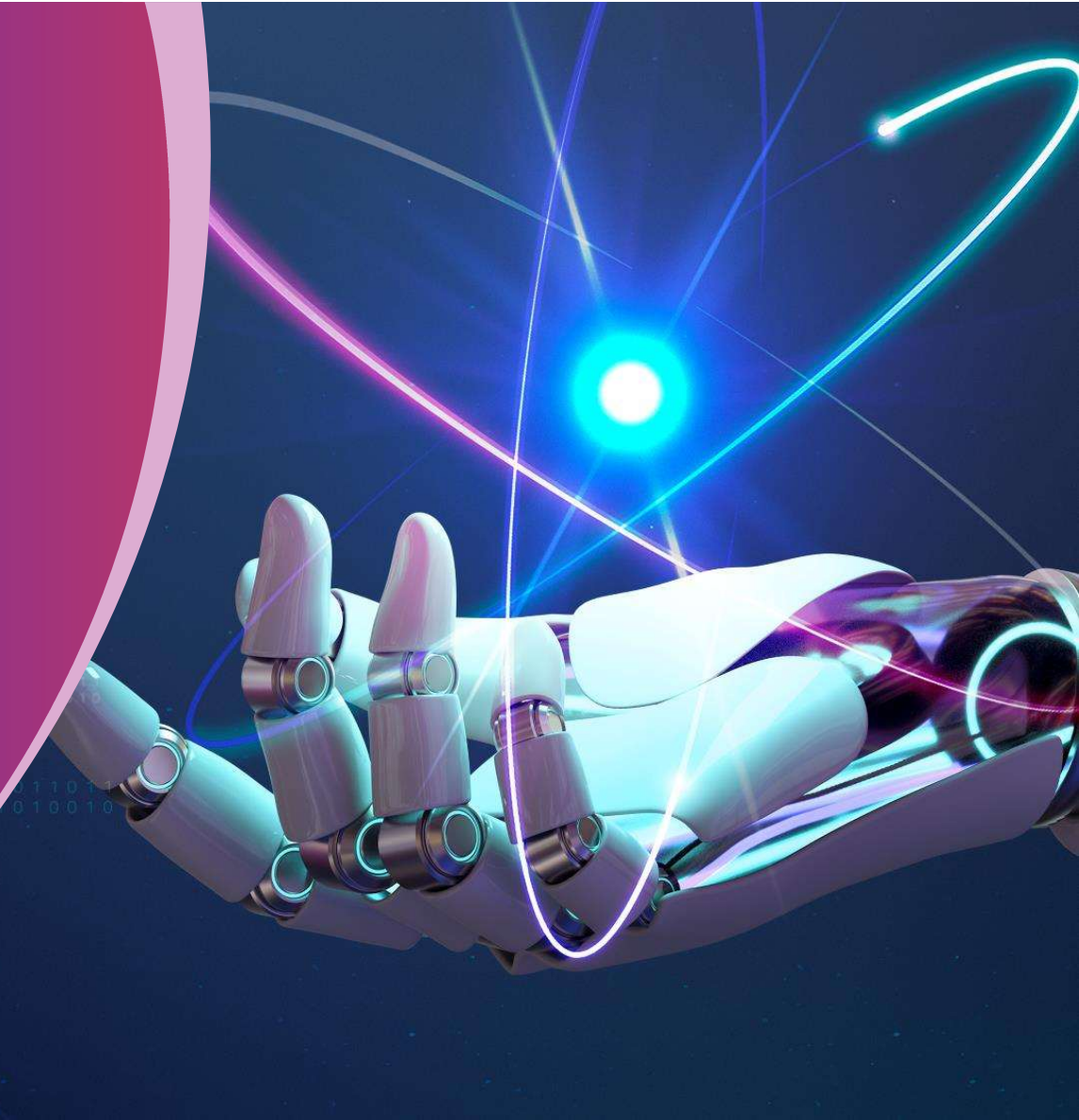
Functional expansion slips from a peak of 86% in 2023 to 51% in 2025, signaling a strategic pivot.

## Strategic mandate

The GCC is now the enterprise's value orchestrator. GCCs are shifting from cost arbitrage to strategic value, with most driving end-to-end global processes. We also see them increasingly influencing key business decisions, positioning themselves as integral partners in shaping enterprise growth and innovation.



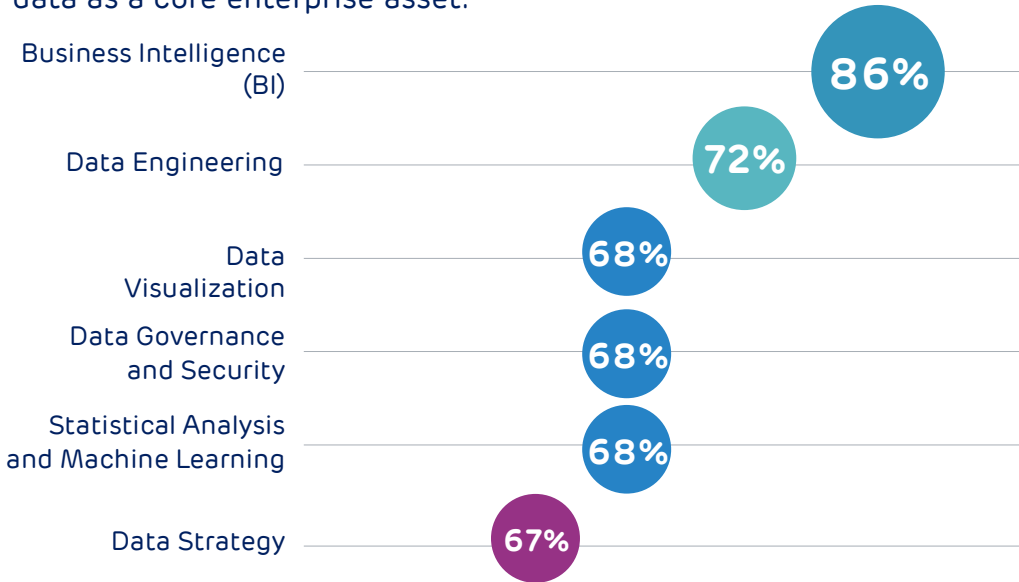
# AI, data and digital technology



# AI, Data, and Digital Technology (1/2)

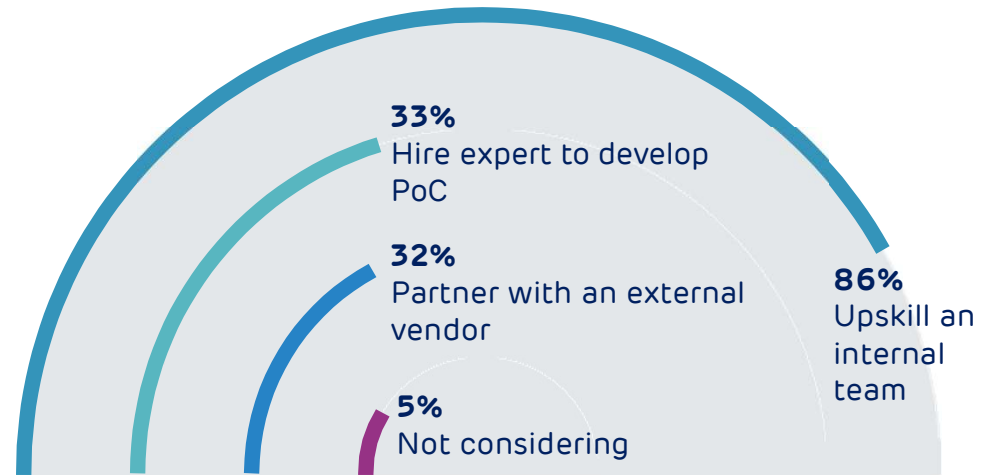
## Data and analytics skills

GCCs have progressed from exploring data to fully operationalizing it. Business Intelligence (rising from **80%** in 2024 to **86%** in 2025) and Data Strategy (from **51%** in 2024 to **67%** in 2025) now underpin digital decision-making, establishing data as a core enterprise asset.



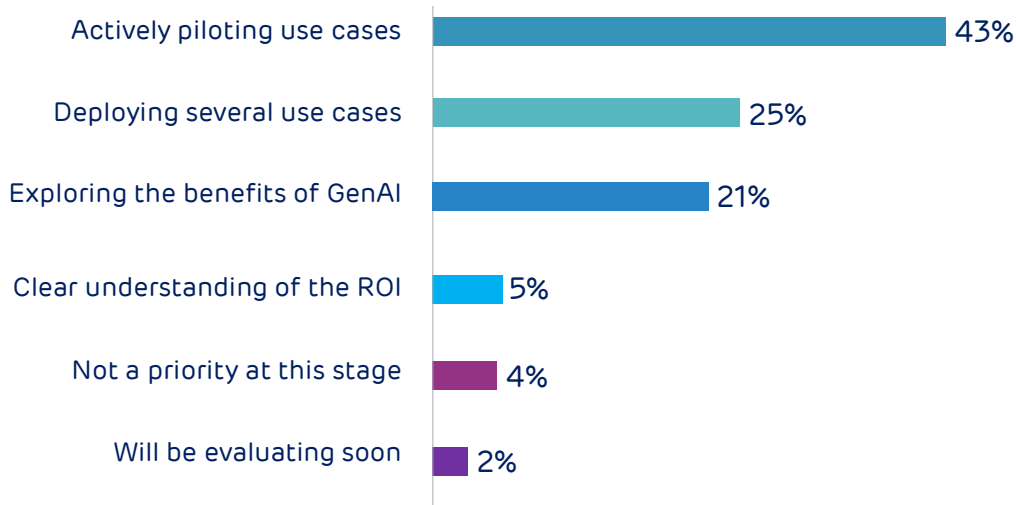
## GenAI adoption

The sharp rise in upskilling reflects a shift toward building in-house GenAI capability to drive efficiency, innovation and long-term competitive advantage.



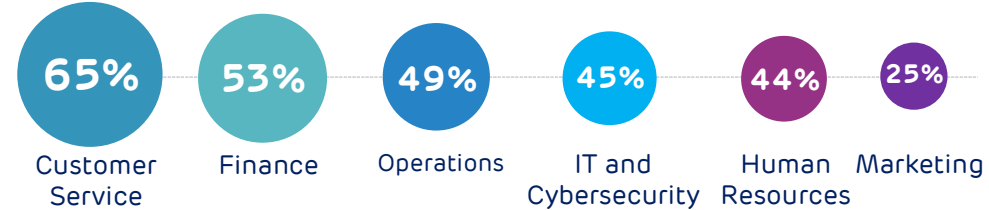
## Approach to GenAI

GCCs have moved from curiosity to commercialization in their GenAI journey. In 2025, more centers are piloting (43% vs. 37% in 2024) and deploying (25% vs. 21% in 2024) GenAI use cases, signaling a clear shift from exploration to execution and measurable business impact.



## Areas of GenAI application

GCCs are applying GenAI where it matters most - enhancing customer experience. They are using chatbots, personalization and sentiment analysis to deliver faster, smarter and more human-like interactions.



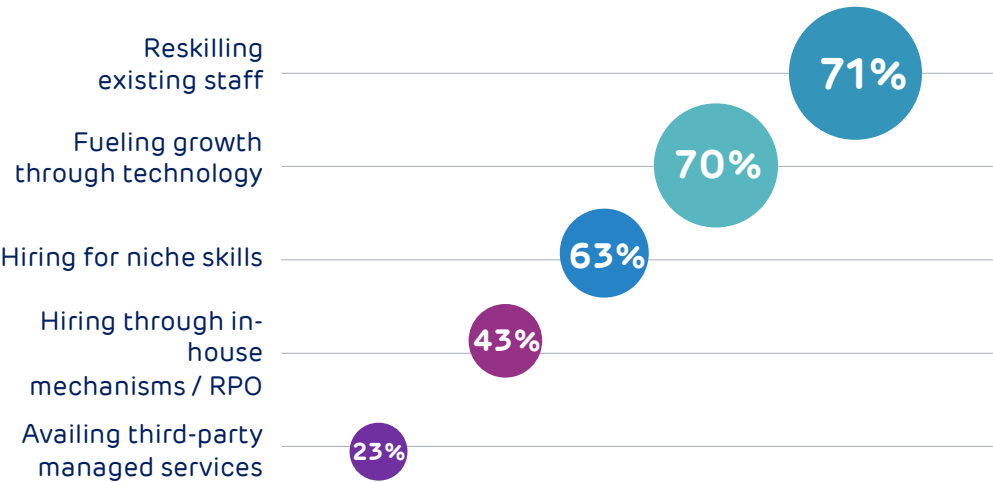
# People and organizational effectiveness



# People and Organizational Effectiveness (1/2)

## Scalability in operations

GCCs are scaling smarter, not larger. Reskilling and tech-led growth now define their scalability playbook, supported by a stronger push for niche skill hiring.

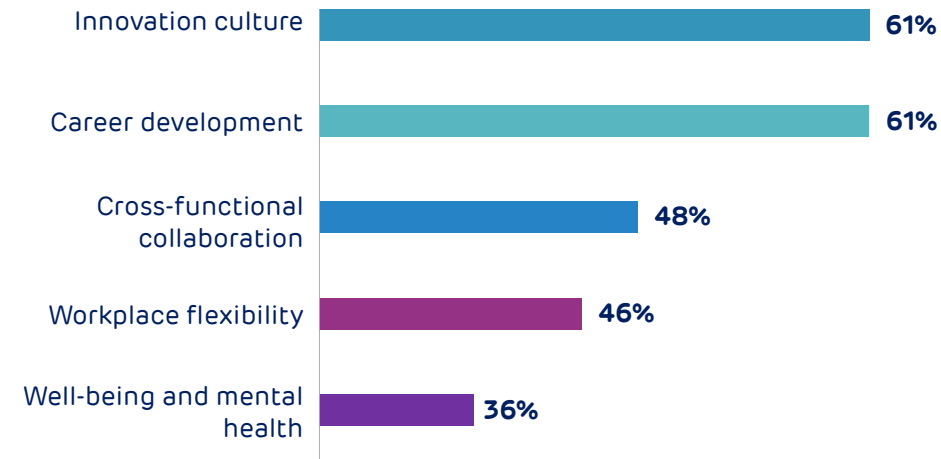


## Spotlight

Hybrid is here to stay: **95%** of GCCs now operate in a hybrid model, redefining flexibility as the new normal.

## Evolving Employee Value Proposition (EVP) Priorities

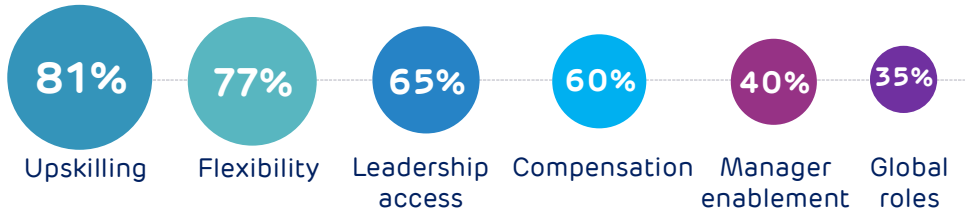
Innovation culture and career development lead GCCs' EVP as centers race to retain high-demand digital talent. Employees now seek meaningful, innovation-driven work and not just pay, pushing GCCs to invest in structured learning paths, rotational projects and clear career growth tied to innovation outcomes.



# People and Organizational Effectiveness (2/2)

## Retention strategies

The steady decline in attrition rates showcases a shift from pay-based retention to purpose-led engagement, as GCCs focus on upskilling, flexibility and leadership access to build lasting loyalty.

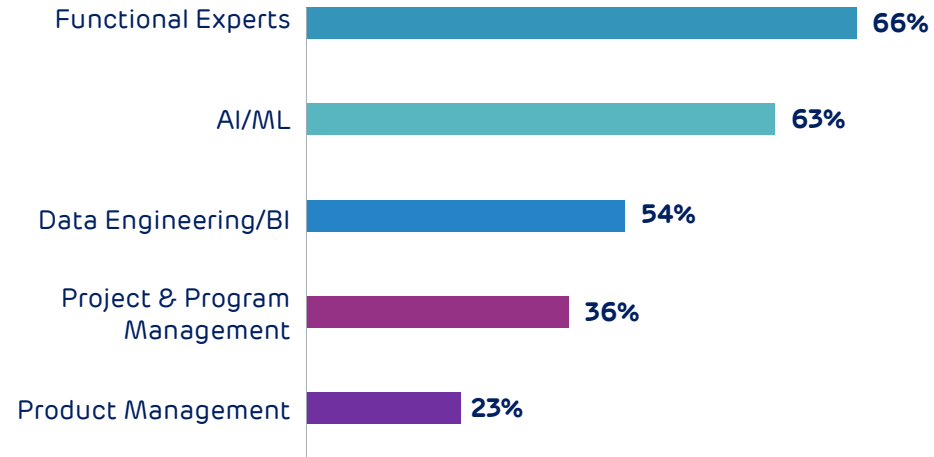


### Spotlight

Attrition rates continue to decline, from **13%** in 2023 to **11%** in 2024 and now down to **9%** in 2025, reflecting stronger retention strategies across GCCs.

## Skills in focus

GCCs are prioritizing domain depth knowledge, closely followed by AI/ML and data engineering, signaling a shift toward tech-enabled business specialization over generic management skills.



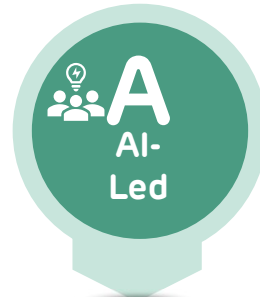
## The C-suite Leaders and HQ Sponsors of Tomorrow want their GCCs to be



- Robust Processes and Tools designed for evolving business outcomes
- Delivery aligned with Business KPIs
- Product-centric, outcome-driven services
- Enterprise growth aligned operations
- Connects GCC goals to business strategy



- Real-time operational visibility
- Predictive and prescriptive insights
- Data-backed tactical decision-making
- Enterprise intelligence platform building
- Integrated internal and external data sources



- Non-decision tasks automated at scale
- Hypotheses testing with AI pods
- Domain R&D through fusion labs
- Insight-as-a-Service as Data and AI backed consultants
- AI to accelerate business impact



- Innovation Engines
- Analytics blended with business acumen
- Tactical decisions enabled and executed
- Reduced latency in decision making
- Enterprise needs anticipated by trend analysis



- Reimagines roles with data led decision-making capabilities
- Future-ready leadership pipelines
- Leadership academies for innovation
- Decision-ready enterprise leaders
- Fosters a culture of experimentation

## Tomorrow belongs to the BRAVE Next-Gen GCCs, who are Business-aligned, Reimagined with Data, AI-Led, Vision Drivers and Empowerment Enablers.

### Leading the Change Imperatives in...

### ... along with...

#### People:

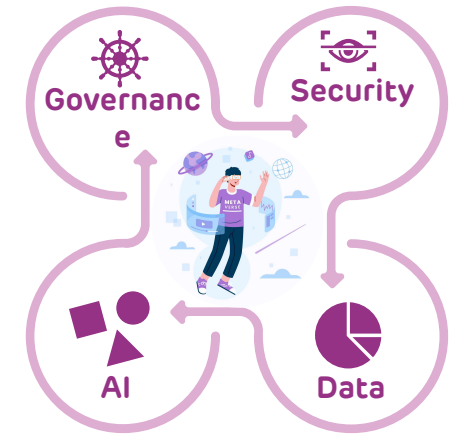
- Building multi-skilled, AI-fluent, domain-deep talent. Shift from execution to decision ownership
- Create leadership academies and fusion team
- Adapt to Gen Z expectations and agile careers

#### Process:

- Align workflows with business outcomes
- Embed KPIs into product-centric services
- Automate non-decision tasks at scale
- Enable predictive and prescriptive decisioning

#### Technology:

- Deploy agentic AI for autonomous workflows
- Integrate internal and external data sources
- Build reusable automation and insight assets
- Invest in scalable, secure digital platforms



#### Navigating some key Watchouts:

- Skill obsolescence and talent retention risks
- Resistance to new operating models
- Over-indexing on tech without business alignment
- Fragmented data and siloed automation
- Inadequate change management and behavioral readiness

## Where GCCs will shine tomorrow:



*The next-generation GCC will evolve into a self-sustained strategic innovation hub, linked with business objectives, where technology capabilities are not just supporting business goals but actively shaping them. These centers will harness AI, data, and platform engineering to prototype new business models, drive customer-centric transformation, and actively influence upstream decisions and create competitive advantage.*

Tomorrow

## Technology will Drive Business



### Business Excellence Centers

Have delivery metrics aligned with business outcomes, build product-centric delivery models with embedded business KPIs and agile governance with real-time metric visibility



### Proactive Insights Centers

Build a powerhouse of data analytics and insights, by cross-pollinating internal and external data, implement enterprise-wide data platforms and embed analytics in decision



### Innovation and Consulting Centers

Build Insight-as-a-Service engines, test out hypothesis in Innovation Pods linked to business units through rapid prototyping, Gen AI and domain-specific fusion labs, building in-house consultants with domain expertise



### Tactical Decision Centers

Automate all non-decision-making tasks and roles, champion human-in-the-loop for critical tasks, create decision centers aligned with LoBs and backed by data and analytics



### Leadership Development Centers

Build leaders through combining data analytics and tactical decision-making skills in GCC chapter leaders, whose KRAs are mapped 1-1 to their respective HQ or C-suite counterparts

# Closing Statement



“As we conclude, let’s reflect on this — coherence is not about uniformity; it’s about unity.



The world’s most successful organizations are not those that operate without conflict or diversity — but those that can align that diversity toward a shared



Global Capability Centers are doing exactly that — transforming from ‘back offices’ to brain centers of innovation and execution.

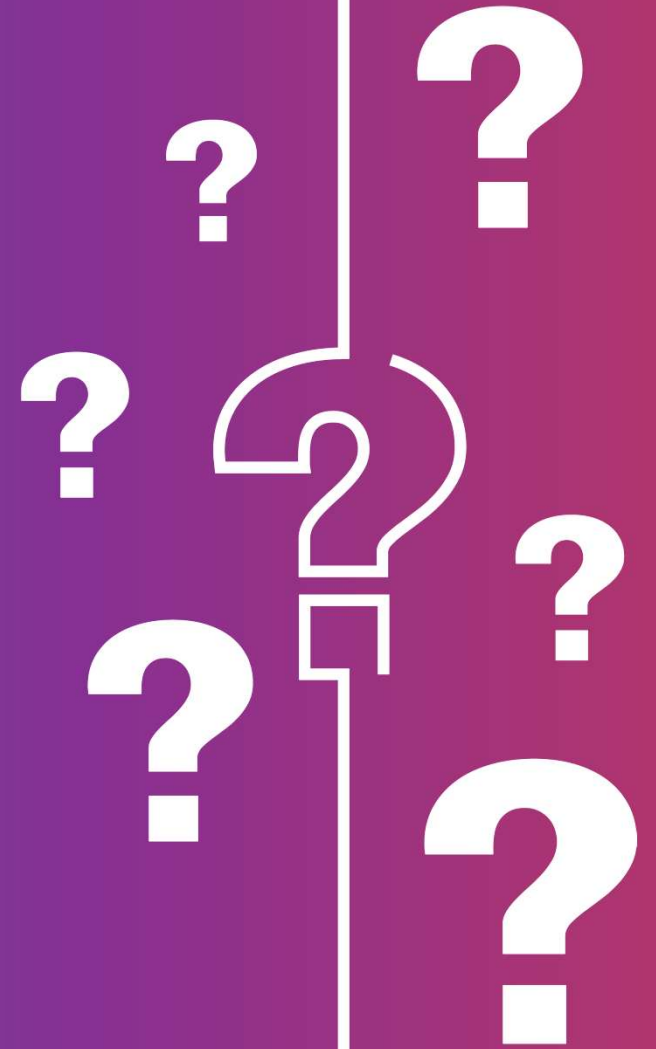


For every management student here — remember, the future belongs to leaders who can think globally, act locally, and lead coherently.



Because in tomorrow’s enterprise — coherence is the new currency of leadership.”

Q&A



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Growth  
with  
Goodness

Thank You

