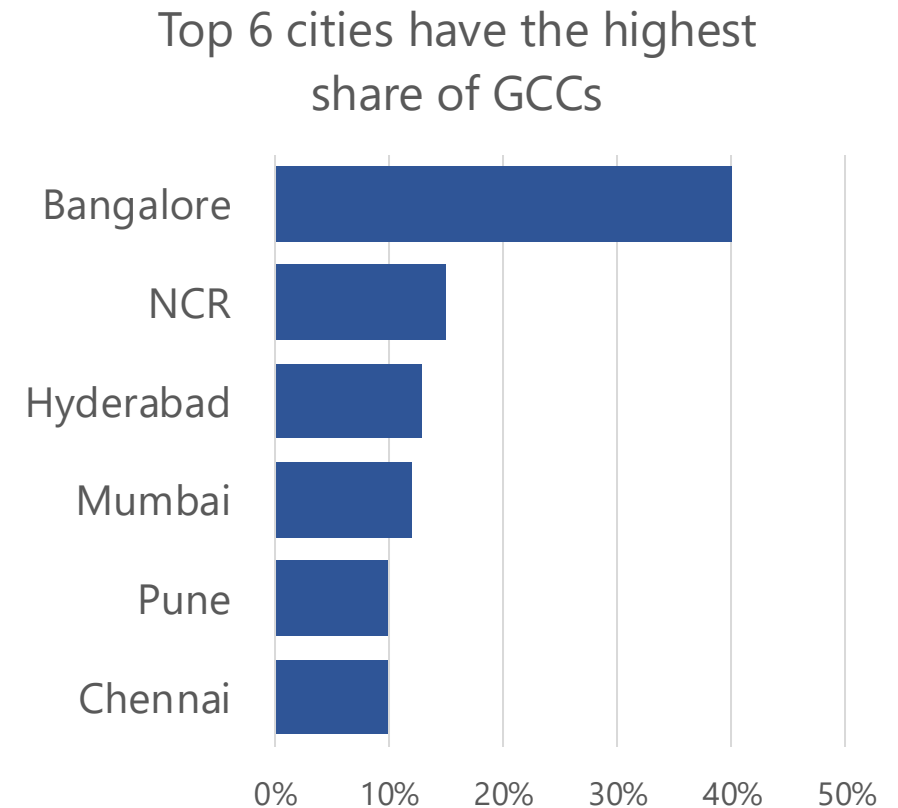


Opportunities with GCCs

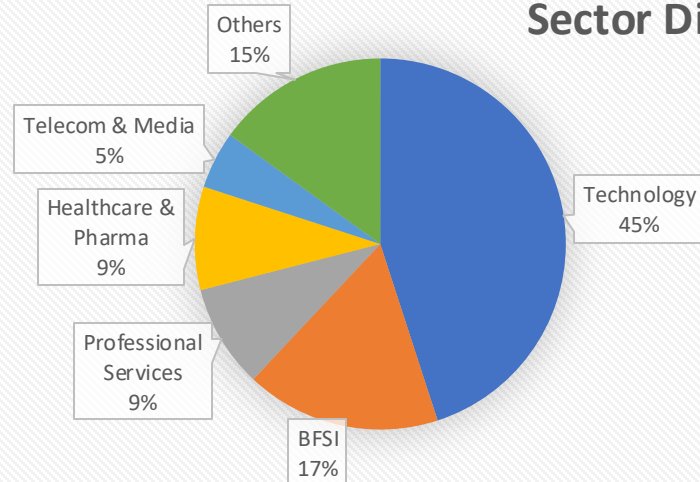
Significant growth expected by 2030

- Currently, ~1750 GCCs in India
- Employing ~2mn people, ~40% of global workforce of GCC
- Projected by 2030:
 - ~2400 centres [~120 new per year]
 - **USD ~110b in market size**
 - **>~4m people**
- ~30% of Global firms have GCCs

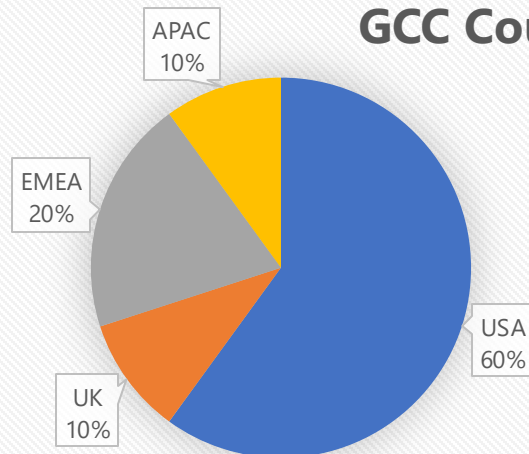


Structure and Sector mix is likely to increase

Sector Distribution



GCC Country Origin



Type of GCC	Features
Shared services	Finance, HR, procurement etc.
R&D centres	New products, technologies and processes
Knowledge centres	To help orgs in sharing the info remotely
Innovation Centres	New Ideas, research, tech innovation etc.
Customer service centres	Customer inquiries, complaints etc.
Mid-Size and Nano-GCCs	Specific purpose driven GCC, or for small size players

GCC Models

Captive

Fully owned, controlled and operated

BOT

Operated by few years by service provider and then transferred with capabilities & capacity

Hybrid

Captive & third-party service providers

Joint Ventures

Partnership between parent company and local firms or other global stakeholders

GCC core functions

Compliance & Risk Mgmt

Ensures regulatory compliance, manages risks, implements governance frameworks

Finance & Accounting

Accounting, financial reporting, budgeting, forecasting, tax compliance, and treasury management

IT Engineering Services

Expertise & capacity in software development, product design, testing, and validation

HR

Manages recruitment, talent management, training, payroll, and benefits administration

Customer Support

IT, Engineering Services

BPO

Outsourcing of non-core business functions such as finance, HR, procurement, customer support, back-office operations

Opportunities

GCC Setup

Talent

Training

Real
Estate/Facility
Management

- Risk Management Compliance for BFSI GCCs – Market Risk, Liquidity Risk, Operational Risk, Counter-Party, modelling, calculations
- CFO value office – Enterprise value creation
- Asset Management – some processes, like Global Research Analyst etc.
- Actuarial for Insurance/Retirement/Pensions GCCs
- Implementation partners with Software Product providers – functional and tech
- Brand Management [mainly digital marketing channels]