

# GCC IN INDIA

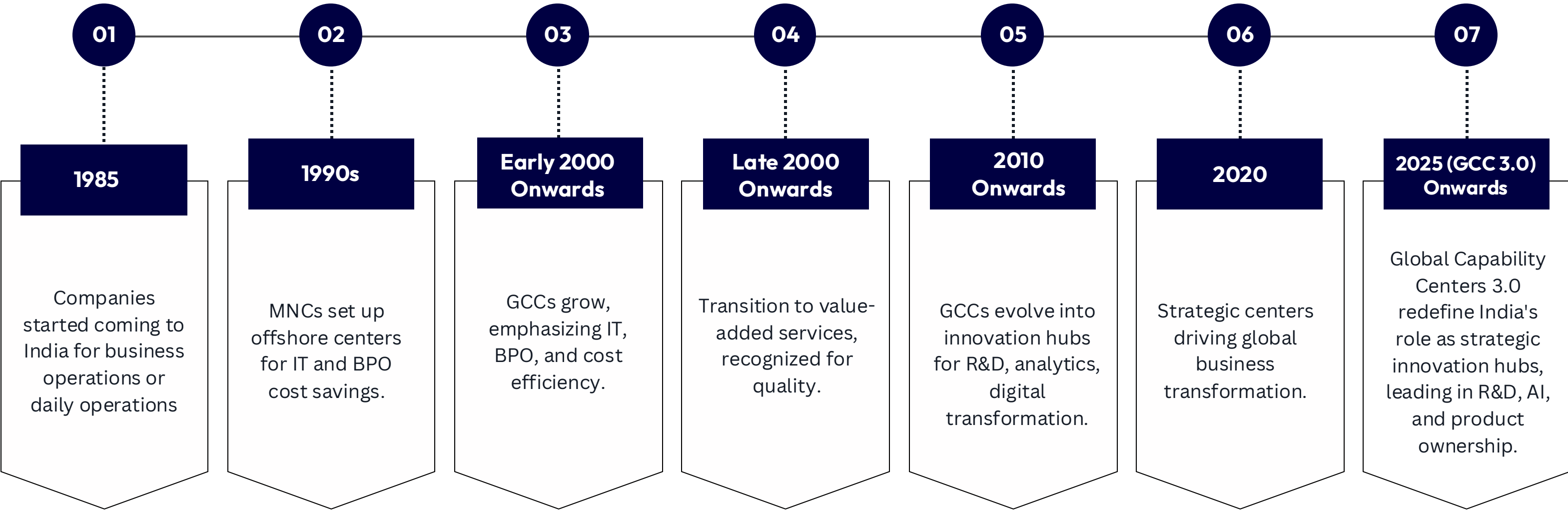
**Cost Centers to Innovation Hub and Real journeys**

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**India's Global Capability Centers (GCCs) have rapidly evolved from cost-effective back-office support hubs to strategic engines of innovation, transformation, and enterprise resilience.**

**As of 2025, India hosts over 1700–1900 GCCs across sectors, employing more than 2 million professionals with a revenue of over USD 60 Billion—and projections suggest this will rise to 2,200–2,500 GCCs by 2030, with a revenue of USD 100 billion reflecting continued global confidence in India's talent ecosystem.**

# The Evolution of Global Capability Centers (GCCs): From Cost Arbitrage to Strategic Innovation Hubs



# GCC 1.0

## The Foundation – Manual Prowess (1985 – 2010)

The genesis of Global Capability Centers (GCCs) in India, spanning 1985 to 2010, was driven by the strategic migration of business processes. India's appeal lies primarily in its vast pool of cost-effective, English-speaking talent, with manual labor and process execution taking precedence.

### Manpower as the Primary Driver

- **Cost-Driven Expansion:**

Leveraged India's lower labor costs for cost-efficient operations.

- **Repetitive, Rule-Based Tasks:**

Focus on tasks like data entry for insurance claims and call center support.

- **Basic IT Support:**

Included foundational IT desktop support services.

- **Volume and Efficiency:**

Emphasized achieving high volume and cost efficiency.

- **Large, Trainable Workforce:**

A critical differentiator for scaling early BPO operations.

### Technology in the Backseat

- **Role of Technology:**

Technology was largely a support tool, not a driver of operations. Early ERP systems were used mainly for record-keeping rather than advanced intelligence

- **Connectivity Challenges:**

Dial-up internet and leased lines limited real-time collaboration

- **Process Focus:**

Emphasis remained on optimizing human workflows. Processes were meticulously documented and standardized.

- **Limitations:**

Reliance on human adherence highlighted potential for scaling issues and human error.

### Migration and Early Hurdles

- **Function Influx:**

Migration of functions from financial services, telecommunications, and IT sectors.

- **Success Metrics:**

Focused on direct cost savings and operational scalability via human effort.

- **Challenges Faced:**

Overcoming quality perceptions. Ensuring data security. Managing nascent communication and power infrastructure.

- **Government Support:**

The Indian government's STPI scheme in the early 1990s offered tax incentives and infrastructure support, crucial for attracting initial operations.

## GCC 2.0

## Synergy and Scale – Capability, Resources, and Emerging Technology (2010-2024)

The period from 2010 to 2024 marked a pivotal turning point for GCCs in India. This phase was characterized by a symbiotic relationship between advanced human capabilities, enhanced resources, and the increasingly sophisticated application of technology.

**The focus expanded significantly beyond mere cost arbitrage towards value creation through process optimization, greater efficiency, and the migration of more complex business functions.**

### Complementary Roles of Capability and Technology

- **Role of Technology:**

Technology teamed up with human expertise through RPA, data analytics, and cloud computing.

- **Enhanced Capabilities:**

Enabled handling of complex functions like FP&A, multi-channel support, supply chain optimization, HR operations, and IT development.

- **Process Evolution:**

Processes became collaborative, with technology augmenting human decisions.

- **Strategic Impact:**

Technology became a strategic enabler, boosting efficiency, accuracy, and innovation.

### Maturity of the Indian Ecosystem

- **Workforce Evolution:**

Teams progressed from simple tasks to specialized roles in finance, healthcare, and engineering.

- **Talent Development:**

Educational programs aligned with industry needs, producing skilled professionals in data science, cloud, and cybersecurity.

- **Infrastructure & Support:**

Enhanced IT infrastructure across major and emerging cities enabled growth.

- **Ecosystem Strength:**

A mature regulatory framework and robust ecosystem positioned India as a trusted destination for high-value GCC operations.

### Nuance

- **Talent Focus:**

Retention became critical as GCCs handled more complex, knowledge-driven work.

- **Value of Expertise:**

Institutional knowledge and specialized skills were recognized as key to quality and innovation.

- **Strategic Role:**

Indian GCCs emerged as innovation hubs for global parent firms.

- **Employee Investment:**

Organizations prioritized development, career growth, and engagement to ensure long-term success.

### Migration & Global Context

- **Global Integration:**

India's GCCs became central to global operations with stronger talent and advanced technology.

- **Strategic Role:**

Shifted from basic service delivery to active participation in global planning and decision-making.

- **Perception Change:**

From "cheaper execution" to "smarter, better solutions."

- **Impact:**

India emerged as a key player in global innovation, efficiency, and resilience, helping multinationals adapt, optimize, and improve continuously.

# GCC 3.0

## The Age of Hyper-Automation(2025)



**Technological Dominance**

- **Leading Technologies:**  
AI, ML, Cloud, and Blockchain drive GCC operations.
- **Automation Impact:**  
Enable complex tasks such as credit risk assessment, supply chain optimization, and multilingual customer interactions.
- **Performance Boost:**  
Deliver superior speed, accuracy, and operational efficiency.

**Tech Pervasiveness**

- **Digital Integration:**  
AI, ML, and Cloud are embedded across GCC operations.
- **Global Impact:**  
Indian GCCs lead and drive innovation worldwide.

**Technology Outpacing Humans**

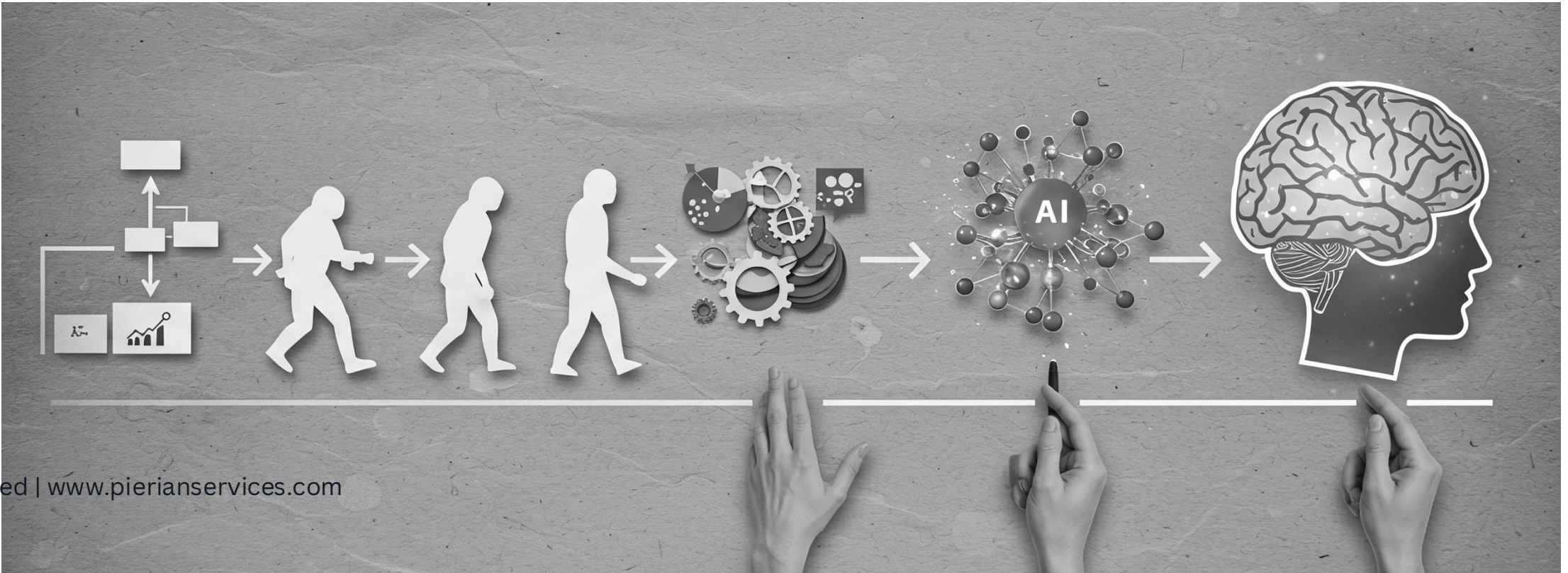
- **Automation of Tasks:**  
AI and ML manage activities such as legal reviews and diagnostics..
- **Human Role Evolution:**  
Humans focus on designing, supervising, and improving intelligent systems.

**High-End Job Migration**

- **Strategic Shift:**  
Roles in AI R&D, cybersecurity, and data science are moving to India.
- **Growth Drivers:**  
A strong tech ecosystem and skilled workforce power this transition.

**Driving Factors**

- **Education:**  
Institutions like IITs and IISc produce AI/ML and quantum computing talent through strong industry partnerships.
- **Industry Maturity:**  
Indian GCCs handle mission-critical projects, meet global security standards, and earn trust for innovation.
- **Geopolitics:**  
India's stability, digital infrastructure, and talent pool position it as a prime hub for resilient, tech-driven GCCs.





# Current & Emerging Trends in GCC

GCCs are driving innovation and strategic decision-making. Investing in leadership development is critical for preparing teams for strategic roles.

# A Shift From Cost To Innovation- Drivers

## 1. Maturity of Talent Ecosystem

- India moved beyond coding and operations to develop deep strength in:
  - Product management,
  - Data science and analytics,
  - Design and customer experience,
  - Global leadership and program management.
- The rise of the **startup ecosystem** also played a big role. It brought in a culture of agility, experimentation, and risk-taking – and that spilled over into GCCs.

## 2. Digital Transformation Reshaped Economics

- The real value now comes from:
  - Speed to market,
  - Innovation,
  - Quality and resilience.
- GCCs, with their scale and skills, became the natural home for **digital and AI initiatives**.

## 3. Leadership Moved Closer to Talent

- Global companies shifted key decision-making roles to India to fully leverage the country's talent, leading to **global heads of engineering, data, and product** based out of India

## 4. Trust Deepened Over Time

- After years of consistent delivery, headquarters were comfortable **handing over core IP, critical platforms, and strategic programs** to their India centres.
- Governance evolved from “**command and control**” to “**co-create and co-own**”.

# A True Innovation Hub is Distinguished from a Cost Centre

*Is the GCC still operating as a cost centre, or has it truly become an innovation hub?*

<b>Mandate</b>	<ul style="list-style-type: none"><li>• Cost centre: “Do this cheaper.”</li><li>• Innovation hub: “Find better ways to do this – or find entirely new things to do.”</li></ul>
<b>Type of work</b>	<ul style="list-style-type: none"><li>• Cost centre: Routine, transactional, tightly defined.</li><li>• Innovation hub: Ambiguous, exploratory, requiring experimentation and learning.</li></ul>
<b>Autonomy</b>	<ul style="list-style-type: none"><li>• Cost centre: Most decisions are made at HQ; the GCC executes.</li><li>• Innovation hub: Local leaders in the GCC make product, technology, and design decisions within clear strategic guardrails.</li></ul>
<b>Metrics</b>	<ul style="list-style-type: none"><li>• Cost centre: Cost per FTE, utilization, SLA compliance.</li><li>• Innovation hub: Revenue impact, customer outcomes, time-to-market, new capabilities, automation and productivity gains.</li></ul>
<b>Invest in Technology Talent and culture</b>	<ul style="list-style-type: none"><li>• Cost centre: Narrow job descriptions, limited career paths, focus on following process.</li><li>• Innovation hub: T shaped talent, cross-functional squads, internal mobility, an environment where it is safe to experiment and safe to fail.</li></ul>

# The Next Steps Of GCC and Enterprises

GCC in India are realizing their potential as innovative hubs with four priorities

## Move from “order taker” to “thought partner”

- GCC leadership are now being accountable not just for delivery, but for **business outcomes**.
- That means proactively bringing ideas, pilots, and roadmaps to global stakeholders – not waiting for requirements documents

## Build product and innovation muscles

- Innovation is not just about having clever engineers.
- It requires:
  - Strong **product management**,
  - Deep **UX and customer research** capabilities,
  - A culture of **rapid experimentation** – hackathons, PoCs, A/B tests – all tied to real business problems.

## Own and scale platforms, not just projects

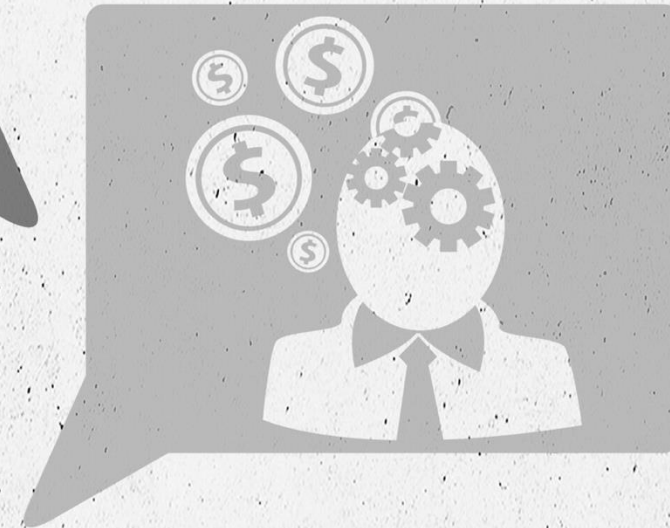
- Instead of executing one-off projects, leading GCCs are now **building reusable platforms**:
  - Data platforms and AI platforms,
  - API layers and microservices,
  - Common automation frameworks.
- These platforms power multiple use cases and multiple markets.

## Nurture a distinctive culture

- Finally, GCCs are creating environments where:
  - People are encouraged to challenge the status quo,
  - Small failures are seen as the cost of learning
  - Impact is valued more than effort.
- Culture is what ultimately differentiates a true innovation hub from a compliant but unimaginative delivery arm.



# Real Cases of GCC's in India



# Germany MNC's GCC

GCC IN INDIA

## Bosch: Scaling R&D and Engineering Innovation in India



### OVERVIEW

**GCC Location:** Bengaluru

**Key Functions:** R&D, engineering services, AI-driven automotive solutions

**Workforce Strength:** 31,500+ employees in India, with 18,000 in R&D

**Investment:** Over €2 billion in India since inception

### LESSONS LEARNED

**Leverage India's startup ecosystem:** Bosch partners with Indian deep-tech startups to accelerate product development.

**Invest in upskilling initiatives:** Bosch's GCC runs internal training programs on AI, IoT, and Industry 4.0 for continued innovation

### STRATEGIC BENEFITS

**Advanced R&D Capabilities:** Bosch's Indian GCC plays a crucial role in developing AI-powered automotive solutions, EV technologies, and Industry 4.0 innovations.

**Cost Efficiency:** By setting up in India, Bosch reduced its engineering costs by over 40% compared to its German R&D operations.

**Talent Pool Utilization:** India's STEM workforce and AI specialists have enabled Bosch to scale its autonomous vehicle and IoT projects rapidly.

## SAP Labs India: A Global Innovation Powerhouse



### OVERVIEW

**GCC Location:** Bengaluru, Pune, and Gurgaon

**Key Functions:** Software development, Cloud computing, AI, ML and ERP Solutions

**Workforce Strength:** 14000+ employees

**Contribution:** Handles 40% of SAP's global product engineering

### LESSONS LEARNED

**Position India as a strategic technology hub:** SAP scaled high-value R&D projects in India, going beyond cost arbitrage.

**Create a strong leadership pipeline:** SAP India nurtures top tech talent for global roles, ensuring seamless cross-border collaboration.

### STRATEGIC BENEFITS

**Cost Optimization:** SAP saves 50% in development costs by shifting core software development to India.

**Cloud-First Strategy:** India's SAP GCC leads cloud transformation efforts, enabling SAP to scale its SaaS offerings efficiently.

**Local R&D Synergy:** SAP collaborates with Indian universities (IITs, IISc) for cutting-edge AI and blockchain research.

## SIEMENS

### Siemens : Driving Smart Manufacturing & Digitalization from India

#### OVERVIEW

**GCC Location:** Bangalore and Pune

Key Functions: Industrial automation, smart infrastructure, AI-driven manufacturing solutions

**Workforce Strength:** 12,000+ employees in India

Investment: Over €1 billion in India's smart factory and R&D projects

#### STRATEGIC BENEFITS

**Smart Manufacturing & Industry 4.0:** Siemens' GCC in India is responsible for global automation solutions, predictive maintenance, and AI-driven industrial applications.

**Scalability & Agility:** India's GCC model allowed Siemens to scale its engineering operations three times faster compared to Germany.

**Collaboration with Indian Institutes:** Siemens partners with IITs and NASSCOM to develop AI-powered industrial automation solutions.

#### LESSONS LEARNED

**Use India's cost advantage to fund advanced R&D:** Siemens reinvests savings from India's GCC into cutting-edge AI and digital twin technologies.

**Adopt a hybrid innovation model:** Siemens integrates local talent with global expertise, ensuring best-in-class solutions.



### BMW: Engineering Excellence & Digital Transformation from India

#### OVERVIEW

**GCC Location:** Chennai and Pune

Key Functions: Engineering services, software development, and AI-powered automotive solutions

**Workforce Strength:** 2,000+ employees in India

**Investment:** €500 million in India's automotive R&D

#### STRATEGIC BENEFITS

**Digital-First Automotive R&D:** BMW India focuses on AI-driven vehicle diagnostics, automated testing, and digital cockpit solutions.

**Operational Cost Savings:** BMW's engineering and software development costs in India are 50-60% lower than in Germany.

**Strong Local Ecosystem:** BMW's GCC collaborates with Tier-1 suppliers and Indian startups to drive innovation

#### LESSONS LEARNED

**Position India as a strategic technology hub:** SAP scaled high-value R&D projects in India, going beyond cost arbitrage.

**Create a strong leadership pipeline:** SAP India nurtures top tech talent for global roles, ensuring seamless cross-border collaboration.

# Germany GCC's – Key Takeaway

## Cost Savings and Efficiency Gains from India GCCs

Key Performance Metric	Germany (GCC Model)	India (GCC Model)	Cost Savings (%)
Software Development Cost per Engineer (Annual)	€100,000	€40,000	60%
Engineering & R&D Costs	€120 per hour	€50 per hour	58%
Time-to-Market for AI/ML Products	18 months	9 months	50% faster
Operational Expenses (Facilities, Utilities, Admin)	€5 million annually	€2 million annually	60%
Total Cost of Ownership (TCO) for a GCC	€50 million	€20 million	60% lower

### Key Takeaways for German MNCs

Significant cost savings: Companies save up to 60% on software development, engineering, and operational costs.

Scalability & agility: India's GCCs enable faster expansion with a flexible talent pool.

Faster innovation cycles: R&D projects in India are completed 50% quicker than in Europe.

# UK MNC's GCC's

## Rolls-Royce: Scaling Digital & Engineering Innovation in India



### OVERVIEW

**GCC Location:** Bengaluru

**Key Functions:** R&D, digital engineering, propulsion systems, supply chain & MRO (maintenance, repair, overhaul)

**Workforce Strength:** 3,000+ employees in India (including ~2,000 engineers)

### STRATEGIC BENEFITS

**Advanced R&D Capabilities:** The Bengaluru hub supports global engineering, propulsion, and diagnostics development, reinforcing India's role in Rolls-Royce's innovation chain.

**Cost Efficiency:** By shifting functions and scaling operations in India, Rolls-Royce can optimize engineering and support costs versus doing them fully in the UK/Europe.

**Talent Pool Utilization:** Though the total Indian workforce is ~3,000+, the new facility provides capacity to scale further and attract more engineers and digital talent.

### LESSONS LEARNED

Building large, scalable centres (700 seats) sets up capacity for future growth and flexibility. Localizing the supply chain (especially in defence and aero parts) can strengthen resilience and cost-control. Strategic timing matters: expansions should align with global demand, bilateral trade treaties (e.g. UK-India CETA), and aerospace sector roadmaps. Maintaining a balance between global oversight and local autonomy is critical to integrate innovation and quality.

## Vodafone: Driving 5G, Cloud & Telecom Innovation from India



### OVERVIEW

**GCC Location:** Pune

**Key Functions:** Telecom engineering, network planning, customer analytics, 5G/IoT, cloud & edge services

**Workforce Strength (2025):** ~12,000 employees (VOIS India).

**Investment (Cumulative):** ~€900 million (estimated from prior drafts)

### STRATEGIC BENEFITS

**Technology Integration & Network Edge:** Use of cloud + edge computing reduced latency by ~40%, improving performance in telecom applications.

**Operational Efficiency:** AI / automation (chatbots, analytics) reduce service cost per user and lower support overhead.

**Scalable Innovation Hub:** Indian operations serve as a global centre for telecom R&D and rollouts, accelerating Vodafone's digital transformation.

### LESSONS LEARNED

Invest in next-gen infrastructure (edge, IoT, 5G testbeds) ahead of demand. Maintain strong collaboration between global teams and Indian engineering for synchronized rollout. Focus on continuous upskilling of network engineers in AI and cloud-native telecom stacks.

# UK MNC's GCC's

## HSBC: Reinventing Banking & Financial Services via AI & Automation



### OVERVIEW

**GCC Location:** Bengaluru

**Key Functions:** Finance operations, risk management, compliance, analytics, AI, blockchain pilots

**Workforce Strength:** 19,000+ employees in Indian GCCs (from prior estimates)

**Investment:** ~€1.6 billion

### STRATEGIC BENEFITS

**Process Automation & Efficiency:** RPA and intelligent systems eliminated ~250,000+ manual hours per year, accelerating throughput.

**Enhanced Risk & Fraud Detection:** AI models reduced fraud detection time by ~60% and improved predictive capabilities.

**Blockchain / Innovation Pilots:** Executed blockchain trade finance pilots processing over USD 500 million in transactions.

### LESSONS LEARNED

Align innovation with tight regulatory frameworks (banking, data).  
Build strong governance, explainability, and auditability into AI systems.  
Scale labs gradually — start with pilots, then modular rollout into core banking.

## Standard Chartered: Digital Banking & Fintech Partnerships



### OVERVIEW

**GCC Location:** Chennai & Bengaluru

**Key Functions:** Digital banking, fintech engagement, RPA, analytics

**Workforce Strength (2025):** ~20,000 employees

**Investment (Cumulative):** ~€1.1 billion

### STRATEGIC BENEFITS

**Fintech Ecosystem Integration:** Partnerships accelerate digital product launches and innovation.

**Operational Efficiency via RPA:** Automation cut process turnaround by ~45%.

**Data & AI-Driven Insights:** Analytics reduced losses, optimized engagement, and improved personalization.

### LESSONS LEARNED

Co-creation with fintech and local startups speeds adoption.  
Ensure a strong ethics / compliance framework when scaling digital financial services.  
Embed feedback loops from Indian teams to global product orgs.

# UK MNC's GCC's

## Barclays: Accelerating Cloud, Cyber & Data Transformation



### OVERVIEW

**GCC Location:** Pune (with other centres in India)

**Key Functions:** IT services, cloud, cybersecurity, analytics, customer onboarding

**Workforce Strength (2025):** ~18,000 employees

**Investment (Cumulative):** ~€950 million

### STRATEGIC BENEFITS

**Cloud Adoption:** 80%+ of IT infrastructure migrated, improving scalability and security posture.

**Analytics & Efficiency Gains:** Onboarding efficiency improved ~35%.

**Hybrid Work & Cost Savings:** Flexible work strategies reduced facility overhead by ~15%.

### LESSONS LEARNED

Robust cybersecurity and compliance are non-negotiable in cloud transformation. Data governance and privacy (especially cross-border) must be baked in from Day 1. Growth in India should be modular, to align with evolving global architecture.

## Unilever: Digitalizing Supply Chain & Sustainability Innovation



### OVERVIEW

**GCC Location:** Bengaluru (Unions' / tech hubs)

**Key Functions:** Supply chain digitization, AI consumer analytics, sustainability R&D

**Workforce Strength (2025):** 10,000+ employees in India (used earlier estimate)

**Investment (Cumulative):** ~€1.4 billion

### STRATEGIC BENEFITS

**AI & Forecasting:** Predictive analytics improved forecast accuracy ~32%.

**Sustainability Gains:** Carbon emissions down ~42% since 2018; energy efficiency & waste reduction initiatives expanded.

**IoT Supply Chain Efficiency:** Real-time IoT monitoring reduced waste/inventory lags ~25%.

### LESSONS LEARNED

Sustainability should be integrated into digital transformation from the start. India's rich data ecosystem is a strong base for global consumer insights. Local innovation hubs should remain closely networked with global R&D strategy.

## Texas Instruments: Pioneering Semiconductor R&D and Design Innovation in India



### OVERVIEW

**GCC Location:** Bengaluru

**Key Functions:** Semiconductor design, embedded systems development, analog/mixed-signal engineering, and AI-driven chip innovation

**Workforce Strength (2025):** ~2,200 employees in India, including 1,000+ engineers focused on semiconductor design, software, and embedded systems

**Investment (Cumulative):** Over US \$400 million invested in India since inception, covering R&D infrastructure, labs, and collaborative innovation programs

### LESSONS LEARNED

- **Invest Early in Deep-Tech Hubs:** Establishing India's first semiconductor R&D center (1985) gave TI a multi-decade competitive edge.
- **Leverage Academic Partnerships:** Collaborations with leading institutes (IISc & IITs) have created a sustainable innovation pipeline and fostered IP co-development.
- **Drive Cross-Domain Integration:** Combining AI, IoT, and semiconductor R&D accelerates innovation and scalability across emerging technologies.
- **Upskill Continuously:** Regular training in EDA tools, AI chip design, and nanotechnology ensures workforce agility and global leadership.

### STRATEGIC BENEFITS

#### Advanced R&D Capabilities:

TI India executes nearly 60 % of the company's analog and embedded engineering work, supporting product innovation across automotive, IoT, and industrial segments. The India GCC has contributed to multiple global patents in power management and low-energy system-on-chip (SoC) designs.

#### Cost Efficiency:

Setting up operations in India enables 45–50 % R&D cost savings versus equivalent U.S. programs. Local expertise in ECE and VLSI shortens development cycles and increases design output efficiency.

#### Innovation Ecosystem Collaboration:

Through initiatives such as the TI India Innovation Challenge and university partnerships, the company collaborates with 25+ Indian startups and research institutes, nurturing semiconductor talent and co-creating IP.

#### Global Product Impact:

Chips and embedded systems engineered in India power over 40 % of TI's automotive and industrial product lines, making the center a critical contributor to TI's worldwide innovation strategy.



# SOUTH KOREAN MNC's GCC's

## Samsung: Deepening R&D & Semiconductor Excellence in India



### OVERVIEW

**GCC Location:** Bengaluru (primary), with R&D presence in Noida & Delhi

**Key Functions:** Consumer electronics engineering, software development, AI/ML, 5G/6G research, semiconductor design

**Workforce Strength (2025):** ~5,000–6,600 employees in Indian R&D (SRI-B Bengaluru being the largest overseas hub)

**Investment (Cumulative):** Multiple billions USD invested across R&D, manufacturing, and design over years

### STRATEGIC BENEFITS

**Global R&D Leverage:** Indian centers now support advanced AI, telecom, and device innovation pipelines

**Cost Efficiency & Scale:** Operating in India yields ~40–45% lower R&D/test costs versus Korea

**Innovation Ecosystem Access:** Collaborations with ~50+ Indian startups and academic labs accelerate co-innovation

### LESSONS LEARNED

- Building scale and specialization in R&D (semiconductors, AI) across geographies pays off
- Co-locating manufacturing (Noida) and design (Bengaluru) optimizes time-to-market
- Deep links to academia and startup ecosystems ensure sustainable talent and IP flow

## Hyundai: Catalyzing EV & Smart Mobility Innovation from India



### OVERVIEW

**R&D / Engineering Hub:** Hyderabad (HMIE), with proximity to manufacturing hubs in Tamil Nadu

**Key Functions:** Supply chain digitization, AI consumer analytics, sustainability R&D

**Workforce Strength (2025):** ~900+ engineers at HMIE Hyderabad (software & engineering focus)

**Investment (Cumulative):** Substantial multi-billion investments in India; key EV & components investments ongoing

### STRATEGIC BENEFITS

**Next-Gen Mobility Engine:** India R&D is contributing to global EV, autonomous, and connected vehicle stacks

**Cost & Talent Advantage:** Lower costs plus deep pool of software/automotive engineers speed up development

**Innovation Edge:** With labs in software, EV, and hydrogen tech, India becomes a critical node in Hyundai's innovation chain

### LESSONS LEARNED

- Integrate software R&D with vehicle engineering to compress validation and deployment cycles
- Leverage state policies and incentives (Telangana, Tamil Nadu) to scale R&D + manufacturing ecosystems
- Invest in emergent tech areas (e.g. hydrogen, power electronics) early to stay ahead in mobility transformation

**Thank You!**