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GCC AI Maturity Study



May 2026

Abstract/Foreword •

Walk into any leadership meeting today and AI comes up within minutes. The reason is clear. Corporate AI investments are accelerating, research is expanding at an unprecedented pace, hiring patterns are shifting decisively toward AI skills. What was once experimental is now foundational.

This shift lands right at the doorstep of India's Global Capability Centers (GCCs). Over the past decade, GCCs here have gone through multiple reinventions. They have built strong positions across process excellence, product engineering, platforms, and enterprise services. Many are already central to how their companies execute strategy.

Now comes the next inflection point.

There is real energy on the ground, pilots, prototypes, hackathons, new tools, and teams. At the same time, many leaders share a familiar frustration: activity is visible, outcomes feel harder to pin down. Innovation pipelines break before they scale, and many ideas never progress beyond early exploration. Work portfolios still lean heavily toward enablement, with limited depth in core model development

and fine-tuning. End-to-end AI ownership across the tech stack remains uncommon, and IP creation is still in its early stages.

So the real question many GCC leaders are grappling with is practical: Where do we stand today, and what will it take to build AI programs that earn trust, scale well, and show measurable business impact? That question becomes sharper as enterprises enter an AI-first era, where relevance is tied to outcomes, not experimentation.

This Nasscom report in collaboration with Zinnov and Tiger Analytics is written for that moment. It offers a structured lens to assess AI maturity within GCCs, across strategy, capabilities, technology depth, governance, and business impact. It highlights patterns emerging across the ecosystem, surfaces the gaps that quietly slow progress, and outlines the shifts required for GCCs to anchor AI-led transformation with confidence.

AI is rewriting how work gets done. It is also reshaping what enterprises expect from their GCCs. This report is intended to serve as both a mirror and a map, an honest reflection of the present, and a grounded guide to what comes next.



TABLE OF CONTENTS •

05

Executive
Summary

14

The GCC AI
Maturity Framework

48

Conclusion

10

Introduction

20

Pillar Deep
Dive

51

Appendix



Executive Summary

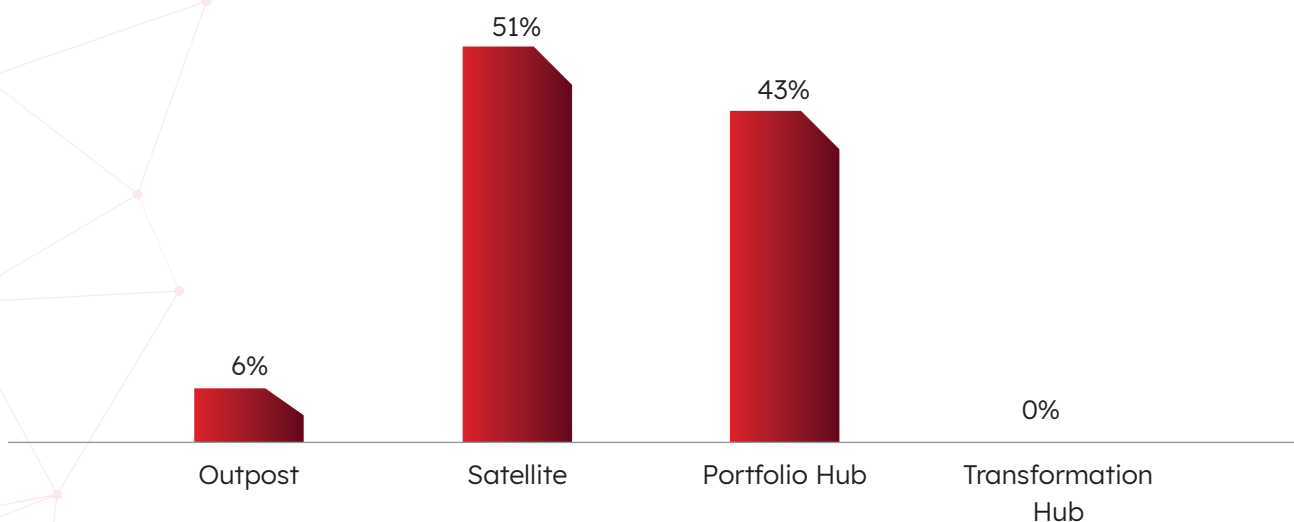
Maturity Mapping and Key Themes

Majority (51%) of GCCs today lie in the Satellite stage of maturity, underscoring the long journey ahead to create true value for the enterprise

GCCs have started structuring AI capabilities, with functionally aligned initiatives emerging alongside pilots, yet most struggle with fragmented impact

To move to the next level of maturity and drive outcomes, GCCs must focus on improving leadership strength, capability depth and foundational readiness

GCC AI Maturity Mapping - FY26



Outpost

GCC has little to no involvement in seeding or driving AI initiatives

Satellite

AI initiatives begin to gain traction with selective adoption within the GCC

Portfolio Hub

AI is a strategic enabler, evolving to coordinated, cross-functional programs

Transformation Hub

AI is a part of the GCC's core, driving enterprise innovation and owning outcomes

Key Theme 1

While GCCs play the role of enablers of global AI initiatives, they are also starting to take initiative in driving AI strategy

Supporting Data:

Only 13% of GCCs play a role beyond execution – defining vision and priorities, owning development and outcomes of critical AI initiatives

While 70% of GCCs have a defined roadmap/charter, only 34% have dedicated AI leaders, and 43% do not have dedicated AI budgets

GCCs' influence over Enterprise Strategy is slowly increasing

Only 19% of GCCs have end-to-end involvement across the tech stack

GCCs risk remaining as execution engines unless they build strong leadership, budget authority and decision rights. GCC leaders have a seat at the table and are well positioned to shape enterprise strategy by demonstrating quick but clear wins.

Key Theme 2

Presence of strong leadership is an influencer to driving more matured AI ownership

Supporting Data:

GCCs that have institutionalized senior leadership to drive AI programs have demonstrated higher maturity – through a stronger seat at the table, influence over enterprise decisions, higher innovation progression and ownership of outcomes

However, only 34% of GCCs have formalized AI leadership roles that own the charter, and in fewer cases do these leadership roles align directly with the Chief AI Officer's mandate

GCCs should prioritize AI leadership early in their journey. A top-down approach is essential to drive knowledge, culture and enterprise-wide outcomes. While BUs incubate specific, individual mandates, a central leader should unify these efforts to create synergies and standardize best practices.

The leader must collaborate directly with the enterprise AI leadership to align initiatives with the broader AI roadmap.

Key Theme 3

GCCs that have played an active role in improving foundational technological readiness are meaningfully ahead in their AI journey

Supporting Data:

GCCs that have played a leading role in building strong data and infrastructure foundations are seeing faster use-case progression and higher AI maturity

Data: While GCCs have strong involvement in improving data readiness, activities largely remain supportive (like cleansing and assessments). Shifting toward activities like data strategy and modeling will be essential to unlock the next level of maturity.

Infrastructure: Despite infrastructure decisions being HQ-led, 66% of GCCs are expanding their role in management (scaling, modernization and observability) for AI workloads. GCCs must now focus on building operational excellence to accelerate AI maturity

With GCCs' proximity to critical products/processes, early alignment with enterprise architects, data engineering leaders, and cloud/platform teams ensures foundational readiness and enables meaningful, scalable impact.

Key Theme 4

Presence of strong change management mechanisms drive AI maturity and adoption

Supporting Data:

Most GCCs are relying on low-touch mechanisms (townhall discussions, workshops), focused on building awareness toward AI, rather than enabling behavioral shifts.

While 80% of GCCs have identified AI champions, these roles lack clear mandates, formal impact tracking and accountability; The role of change agents needs to involve driving awareness around specific enterprise mandates, encouraging experimentation, and improving learning outcomes around AI

Only 15% of GCCs have AI-specific rewards programs, leaving a gap in incentivization to encourage experimentation and adoption

Without structured change enablement, AI adoption will plateau at awareness and experimentation. GCC leaders must institute stronger incentives and reinforcement mechanisms to improve AI adoption; Enterprise leaders should operationalize this through clear performance measurement and accountability mechanisms.

Key Theme 5

While AI partnerships are prevalent, there is untapped opportunity to leverage their expertise and talent to build scale

Supporting Data:

While 80% of GCCs engage in AI/ML partnerships, most commonly with Service Providers and Consulting Firms, they haven't translated to the build phase, with less than 20% initiatives seeing co-development with partners

Partnerships span the AI value chain; however, they are currently skewed toward discovery through use-case exploration

Leveraging the expertise, experience, and scale of partners can create an opportunity for GCCs to expedite results and impact.

To build true scale, GCCs must evolve their partnership models and leverage partners' learnings, developed across their engagements.

Key Theme 6

AI Maturity is independent of GCC headcount, reinforcing that scale is not an advantage for AI advancement

Supporting Data:

AI Maturity shows no significant correlation with GCC headcount; Both small-scale and large-scale centers can exhibit high maturity and achieve significant impact in AI ownership

This reinforces that AI success depends on qualitative aspects like leadership strength, capability depth, domain expertise and foundational readiness.

Moving forward, GCCs should prioritize quality of influence, expertise and outcomes over aggressive hiring and headcount expansion.

Smaller GCCs can outpace larger peers with these elements in place, while larger centers may lag without them.

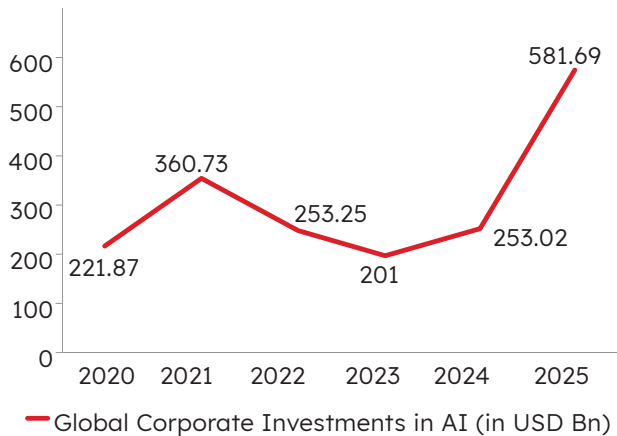


Introduction

Global AI Landscape

Key Insight 1:

AI has become a baseline capability, rather than a differentiator for corporations worldwide.



Sources: Stanford HAI Index - 2026

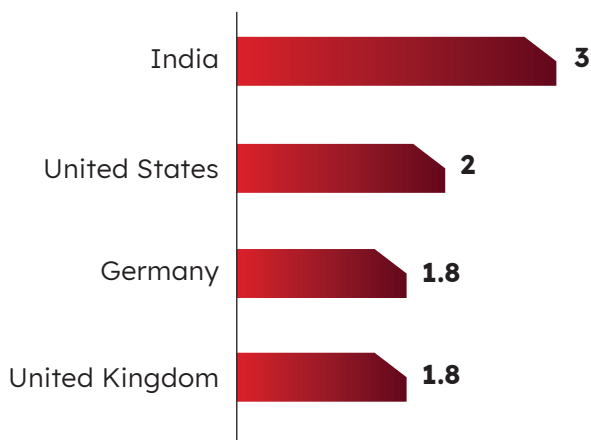
Global corporate AI investment more than doubled in 2025. Generative AI remains the primary catalyst, seeing a 200%+ increase in funding year-on-year⁽¹⁾.

Open-source AI research is accelerating at an unprecedented pace. The volume of AI-related projects on platforms like GitHub and Hugging Face has tripled since 2023, now totaling over 5.6 mn projects⁽¹⁾.

Key Insight 2:

Indian GCCs are positioned to become hubs for AI transformation given the strong availability of talent and a robust ecosystem

AI Skill Penetration Index



Sources: Stanford HAI Index - 2026

India has the 2nd largest AI/ML talent pool after the United States globally, and the highest growth in AI talent, with a 252% rise since 2016⁽²⁾.

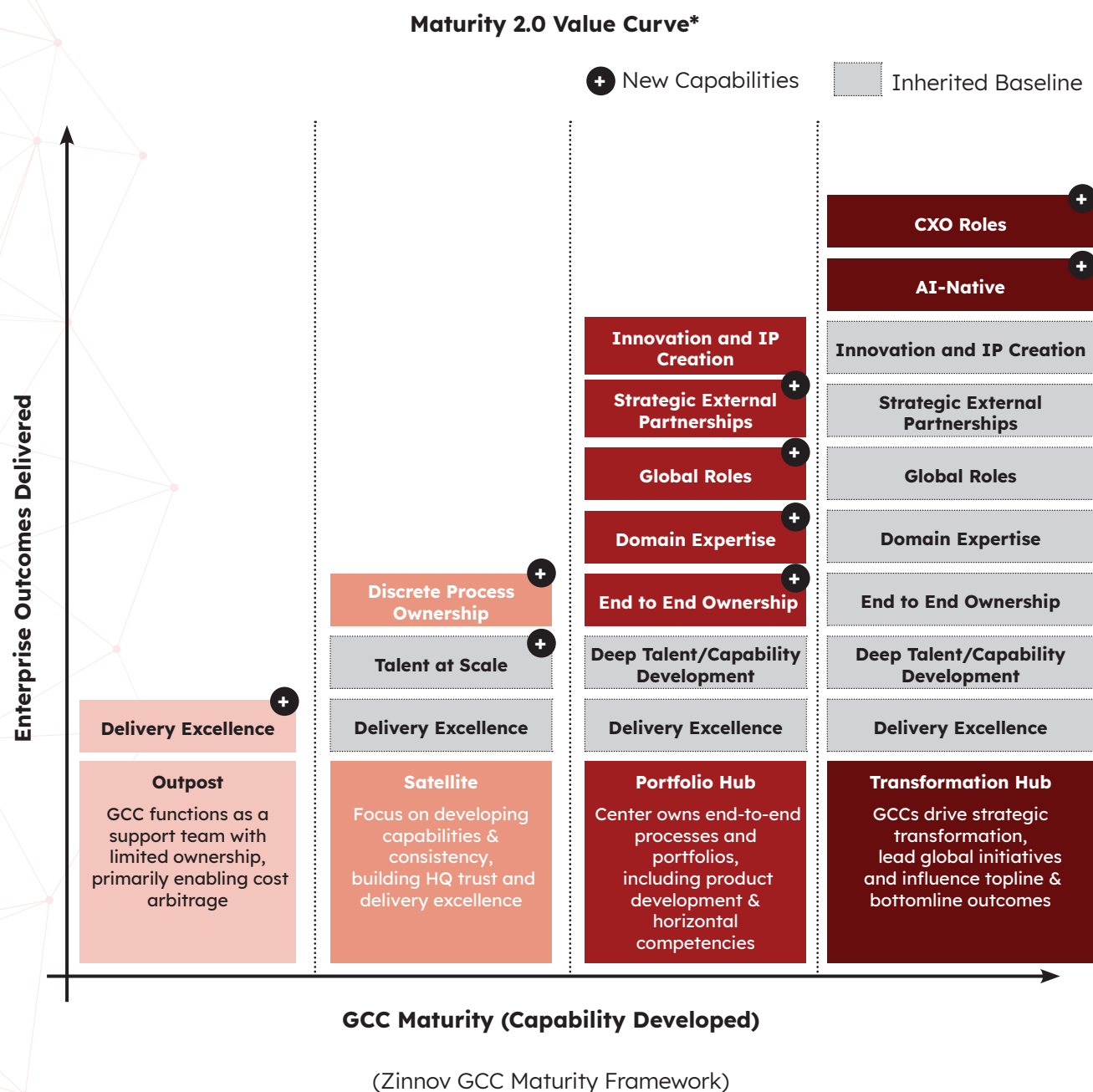
Initiatives such as 'AI for India 2030' and the 'IndiaAI Mission' reinforce India's commitment to emerge as a global AI hub, focusing on skilling, research and startup innovation⁽³⁾.

Further, with 50-55% of the world's GCCs, India is well positioned to scale AI transformation globally, serving as an engine for enterprise-wide transformation⁽⁴⁾.

*AI Skills as a proportion of Overall Skills in an employee's role (excluding China)

Sources: ⁽¹⁾ Stanford HAI Index - 2026; ⁽²⁾ Nasscom - State of Data Science and AI Skills in India; ⁽³⁾ Government press releases; ⁽⁴⁾ Vestian Research

The Transforming Role of a GCC



Indian GCCs have seen multiple inflection points over the past decade, evolving into key enterprise enablers. Today, GCCs in India host differentiated capabilities across process, products and services, driving strong business impact.

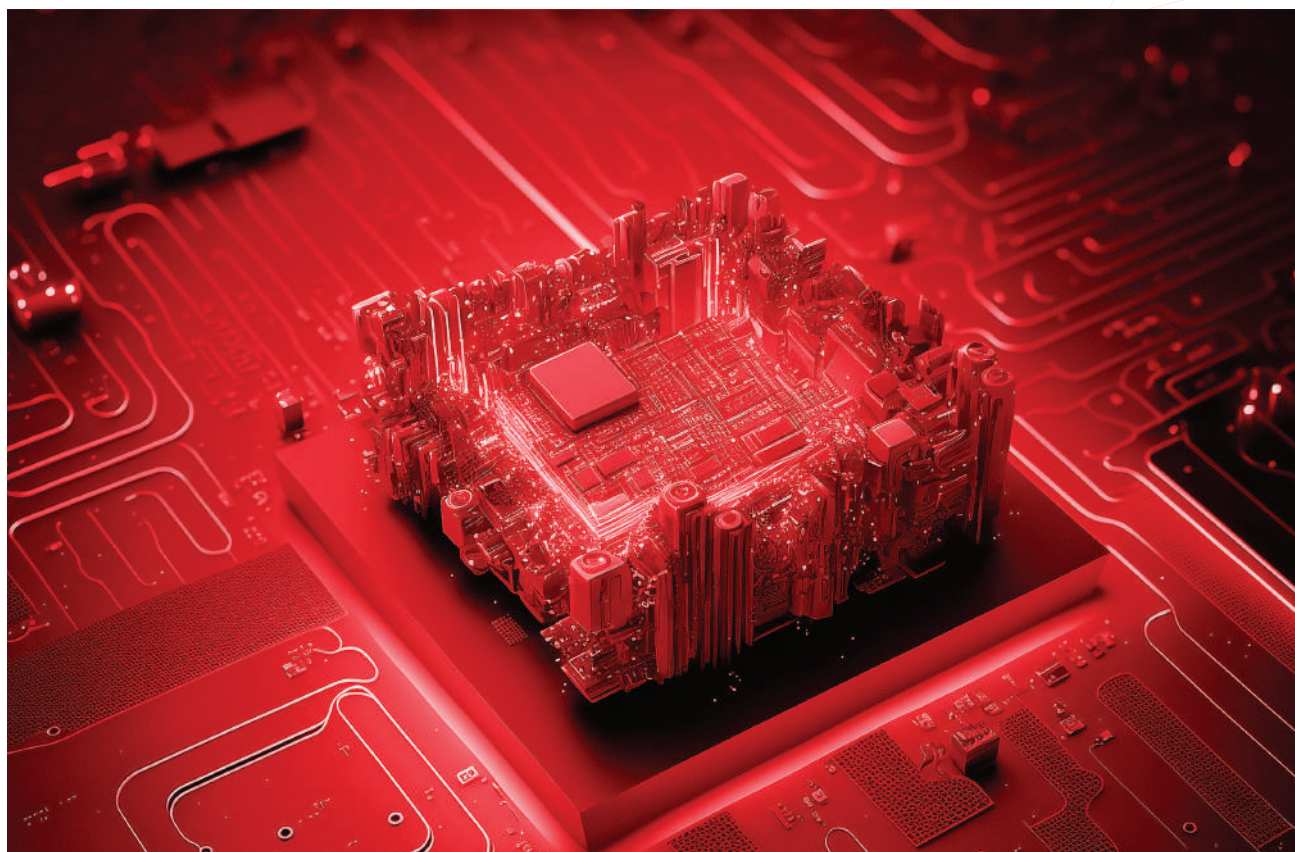
The next phase of maturity requires GCCs to shift from a delivery/capability-led approach to a value-led approach to remain relevant in the enterprise context.

AI: The Upcoming Inflection Point



AI is fundamentally reshaping business models, workflows and decision-making. For GCCs, this presents a decisive opportunity to move beyond delivery/enablement to value creation by embedding AI into capabilities and portfolios.

However, despite high experimentation, impact remains limited - with low use-case throughput and unclear impact causing most initiatives to stall at PoC stages. GCCs are well positioned to bridge this gap - combining proximity to process, and agile talent to operationalize AI at scale.



As enterprises enter an AI-first era, GCCs must evolve from centers of capability to engines of value creation. This is now a question of strategic relevance; GCCs that fail to align AI experiments and investments with enterprise outcomes risk stagnation. Hence, it is essential to baseline their current position on the value curve

The GCC AI Maturity Framework

Assessment Pillars

GCC AI Maturity Framework



Strategic Intent: Assesses the alignment of GCC's AI vision, investments, and other success metrics with the enterprise's AI strategy



Capability Development: Examines the GCC's talent pool, upskilling, partnership and change management efforts supporting AI readiness



Technology and Innovation: Evaluates the GCC's technological foundations to gauge preparedness for building AI initiatives and innovation efforts



Governance and Risk: Evaluates governance and risk frameworks, bias mitigation and Responsible AI practices



Impact: Measures alignment between AI vision and the value realized across the business

Dimensions •

Strategic Intent

- Corporate alignment
- AI leadership
- GCC influence
- Investment planning & capital commitment

Capability Development

- AI/ML workforce development
- Partnerships
- Culture and change adoption
- Organization structure

Tech and Innovation

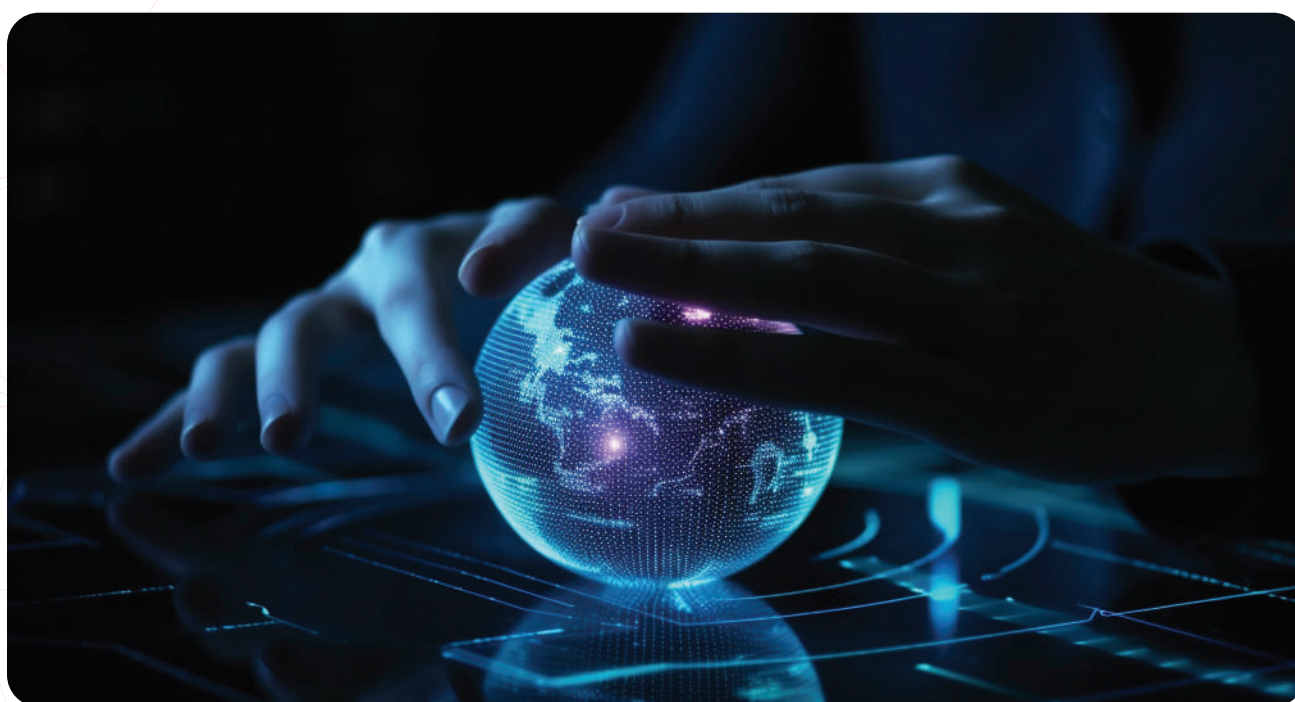
- Technology readiness & influence
- AI/ML operations & optimization
- Innovation

Governance and Risk

- Regulatory alignment
- Compliance
- Responsible AI practices

Impact

- Enterprise contribution
- AI adoption
- Value realization



Maturity Characteristics across Stages

Pillar	Outpost GCC has little to no involvement in seeding or driving AI initiatives	Satellite AI initiatives begin to gain traction with selective adoption within the GCC	Portfolio Hub AI is a strategic enabler, evolving to coordinated, cross-functional programs	Transformation Hub AI is a part of the GCC's core, driving enterprise innovation and owning outcomes
Strategic Intent	AI efforts are opportunistic, with no clear GCC mandates	GCC aligns AI initiatives to functional priorities but has limited influence	GCC has a defined AI mandate and shapes priorities and execution	GCC is a strategic partner, defining vision, and success metrics
Capability Development	AI capabilities are fragmented and not systematically developed	Foundational skilling, domain understanding and change adoption start emerging	GCC moves to role-based skilling, domain-aligned capabilities and structured change	Capability development is institutionalized, positioning the GCC as a talent engine
Tech and Innovation	AI work is limited to isolated application development, with ad-hoc innovation	GCC's work expands into operational layers with some platform involvement	Broad tech stack coverage enables structured, scalable delivery	GCC owns end-to-end work across the value chain, shaping platforms and innovation
Governance and Risk	AI governance and risk management are implicit and largely outside GCC's control	Governance mechanisms are established through local capabilities	Governance, RAI, and ecosystem controls are embedded in AI delivery/operations	GCC orchestrates enterprise-wide AI governance, enabling trusted, scalable innovation
Impact	Early experiments deliver isolated gains, with limited accountability at the GCC	AI begins delivering measurable efficiency gains with growing business adoption	Tangible outcomes are achieved across functions, with clear GCC accountability	AI is a core driver of enterprise transformation, with end-to-end value ownership

Research Methodology

The research for this study was conducted using three complementary approaches:



Subject Matter Expert Network

Leveraged the combined networks of Nasscom, Zinnov and Tiger Analytics, to validate the framework, pressure-test hypotheses and contextualize findings across industries and GCC Archetypes



Primary Research

Conducted structured surveys and in-depth interviews with GCC Heads, AI/Technology leaders to capture GCCs' AI strategies, capabilities, structures and best practices



Secondary Research

Synthesized insights from public-domain sources, academic research and industry publications to strengthen analytical depth and ensure robustness of conclusions



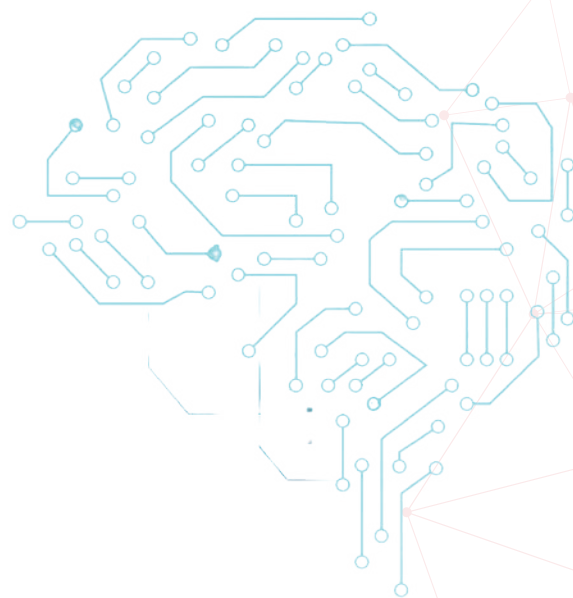
Respondents' Profile

75+

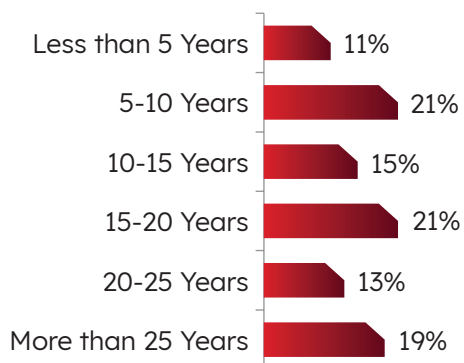
Surveys & Interviews

3

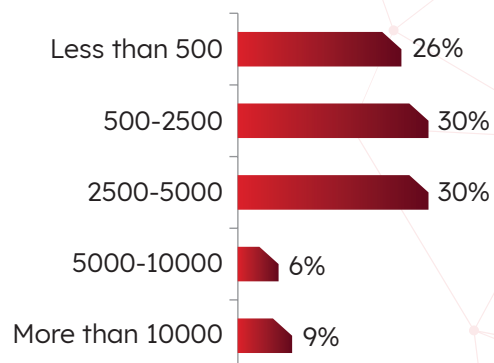
Roundtable Discussions



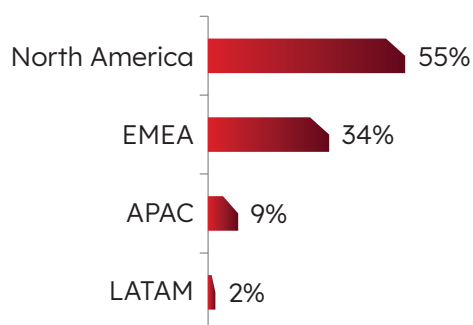
by Age of the GCC



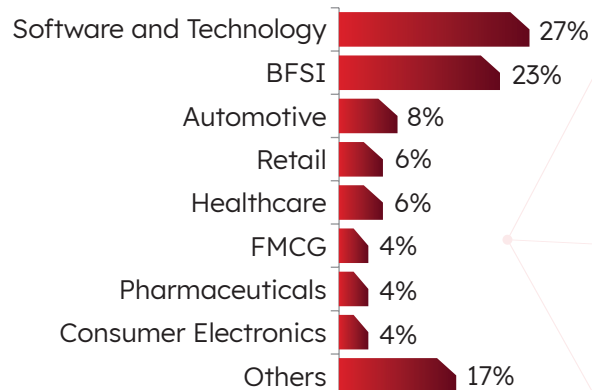
by GCC Headcount



by HQ Location



by Industry



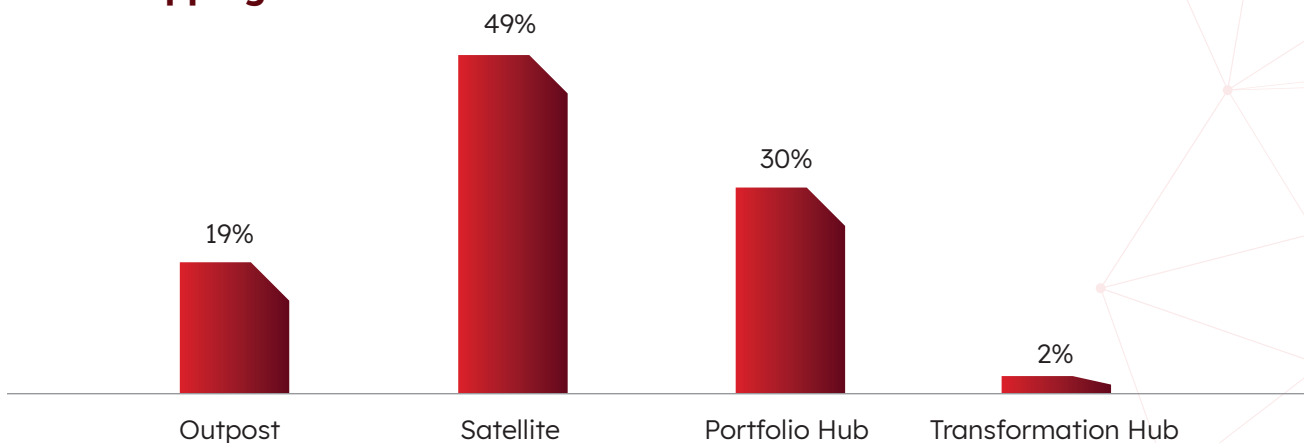
Pillar Deep Dive

Strategic Intent

Key Insight:

AI has become a key dimension of enterprise strategy, and GCCs are key enablers in driving these initiatives, however, they are still maturing from execution partners to truly defining the AI strategy

Pillar Mapping:



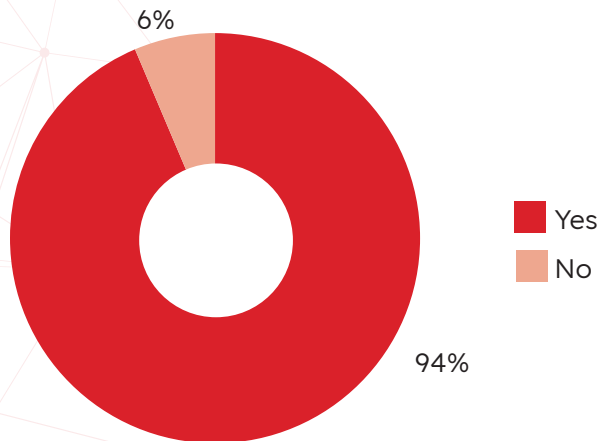
Key Characteristics:

Parameter	Outpost	Satellite	Portfolio Hub	Transformation Hub
GCC AI Leadership	No dedicated GCC AI leadership	GCC AI leadership takes shape (often functionally aligned)	Dedicated AI leader present at the GCC	Global AI leader is present at the GCC
AI Budgets	Enterprise AI spends are on an ad-hoc basis	Allocation of AI budget to the GCC at a functional level	GCC has a dedicated allocation of the AI budget	Majority of the AI budget is allocated to the GCC
GCC's Role and Influence	GCC has no influence over enterprise AI direction	GCC contributes to AI strategy, primarily from a capability lens	GCC plays an active role in shaping AI strategy	GCC is a strategic partner in defining AI vision
GCC AI Roadmap	AI initiatives are BU-led, driven by individual champions	Initial GCC-AI roadmap emerges, with fragmented execution	GCC has a defined mandate aligned to business outcomes, with prioritized use cases and defined responsibilities	

Insight 1:

AI is becoming core to enterprise strategy and growth, and GCCs are increasingly central to executing these initiatives across the organization

1. Does your enterprise have an AI Strategy?

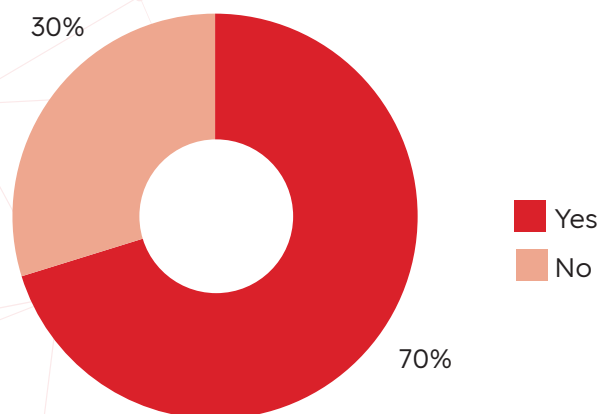


94% of global enterprises have a defined AI strategy, reinforcing AI as a top enterprise priority

However, the degree of alignment with business objectives and how it translates into specific initiatives still vary across enterprises

Enterprises without a holistic AI strategy and clarity on priorities are still running point initiatives across BUs

2. Does the GCC have a defined roadmap to operationalize the AI Mandate?

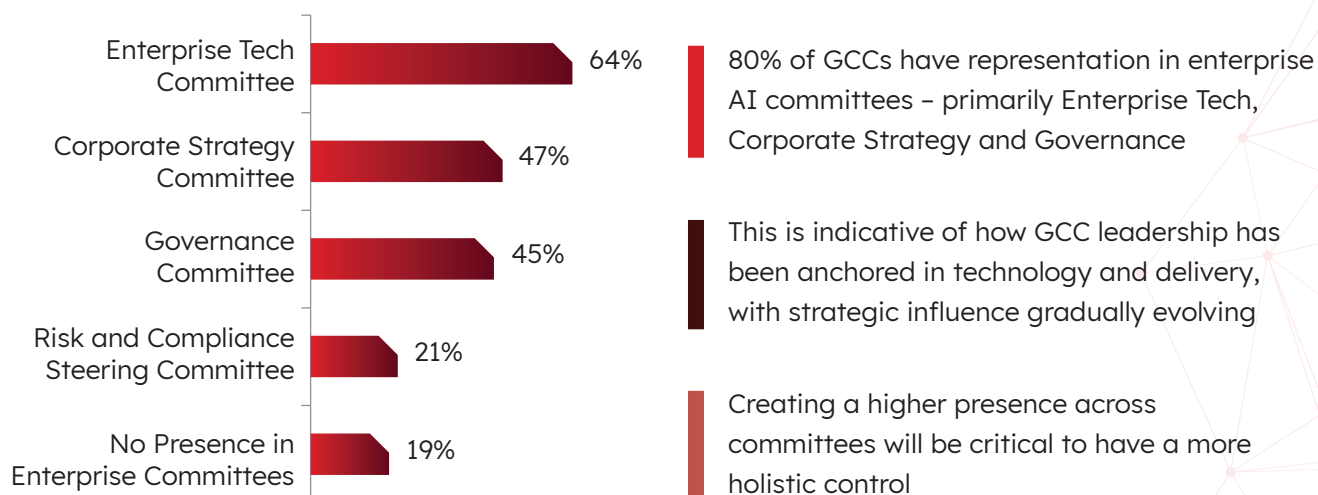


70% of GCCs have a defined AI charter; However, these are often an aggregation of BU-level initiatives rather than a unified, scalable roadmap

Among GCCs with dedicated roadmaps, 72% have central or hybrid teams, reflecting the need for common standards and governance



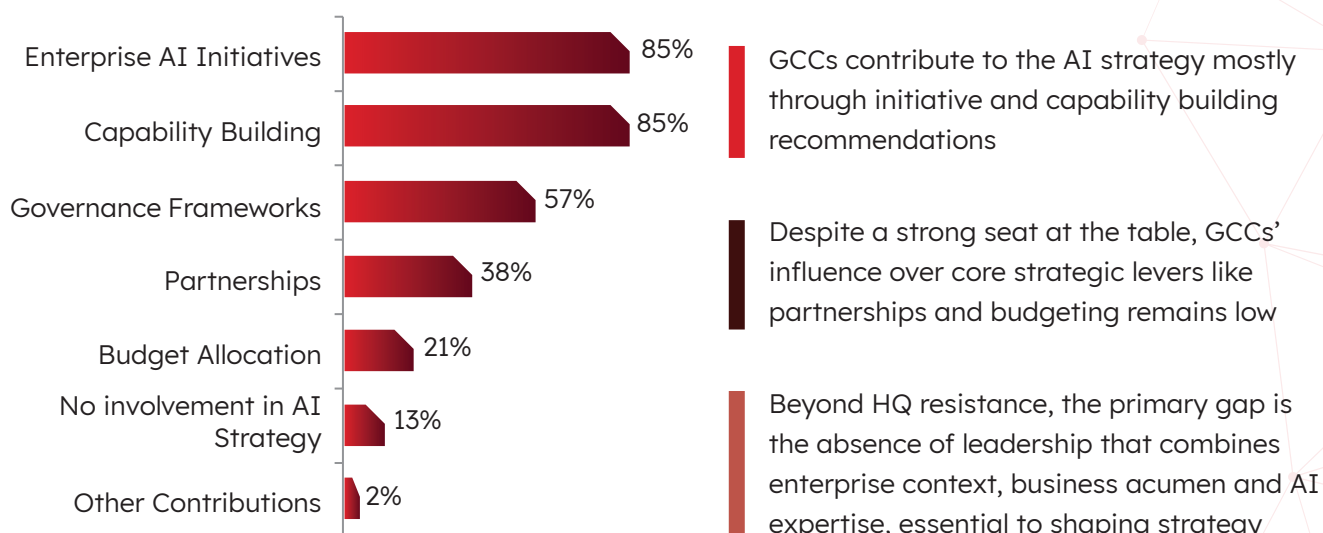
3. Which of the following enterprise committees is the GCC's AI leadership represented in?



Insight 2:

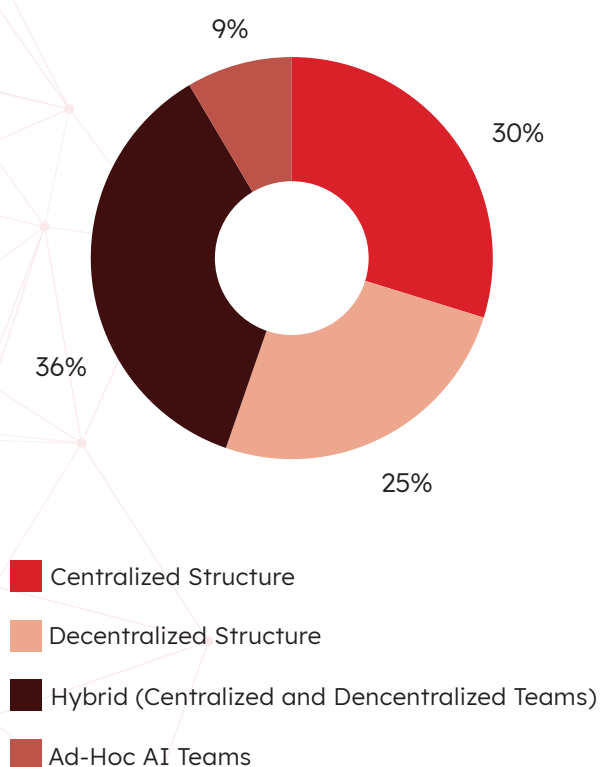
GCCs have a strong seat at the table and their influence over the Enterprise AI strategy is growing

1. What is the GCC's contribution to the Enterprise AI Strategy?*



*Multi - Select Question

2. Which of the following operating models best describes the GCC's AI team structure?



30% of GCCs operate centralized AI models, prioritizing speed, agility, and reusability of assets through strong governance and standardization

Another 25% follow a decentralized structure, with AI teams embedded in business functions/units to deepen domain alignment

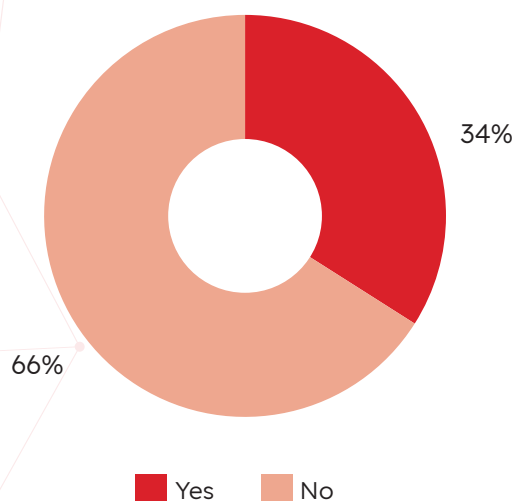
However, 36% of GCCs run hybrid models, where prioritization and governance is centralized while execution is embedded within functional teams

The nearly even distribution across models suggests that there is no single preferred operating structure, as the optimal approach varies based on the GCC's mandates, enterprise context and maturity

Insight 3:

Limited leadership and budget controls further emphasize that GCCs are aligned executors and not strategic contributors of AI strategy

1. Is a dedicated Chief AI Officer (CAIO) or equivalent AI leadership role appointed for the India GCC?



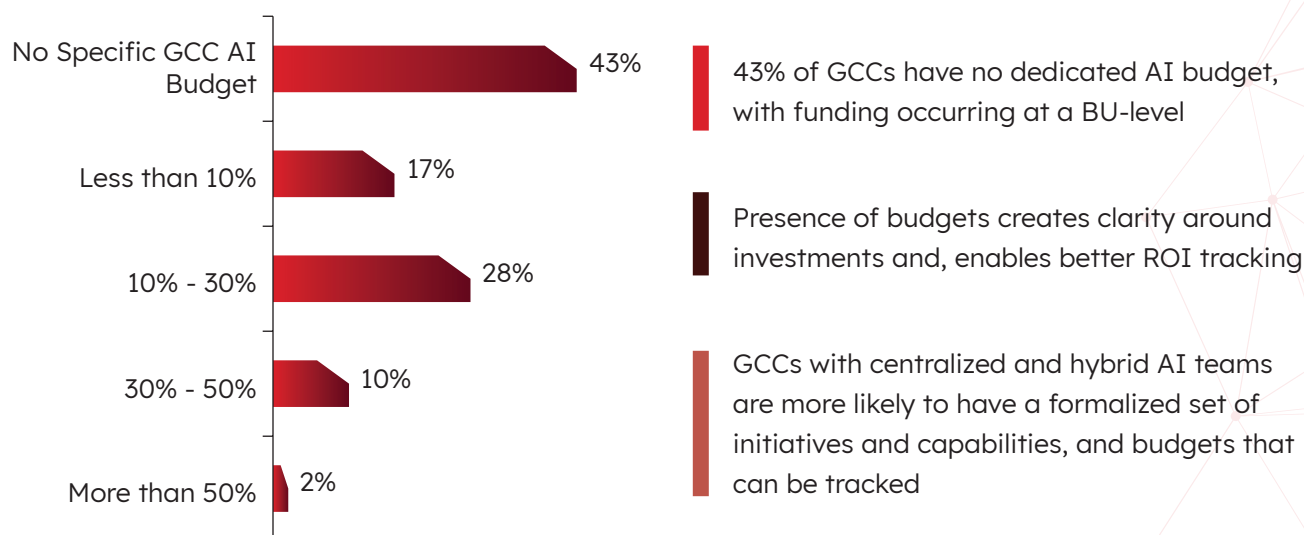
Only 34% have dedicated leaders with explicit accountability over the GCC's AI mandate

Most of these leaders operate a dual role, alongside their engineering or tech leadership role, limiting focus and strategic depth

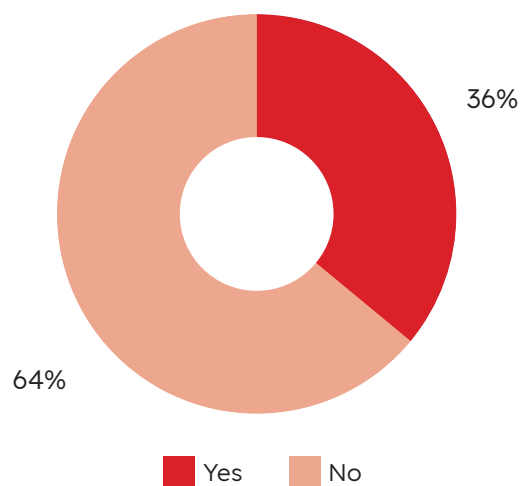
Lack of leadership also limits the opportunity to identify synergies and build a holistic view of AI capabilities being built

2. AI Budgets – GCC Allocation and Discretionary Component

a. What percentage of the Enterprise AI Budget in 2025 was allocated to the GCC?



b. Does the GCC have a discretionary (under GCC leadership's disposal) AI budget?



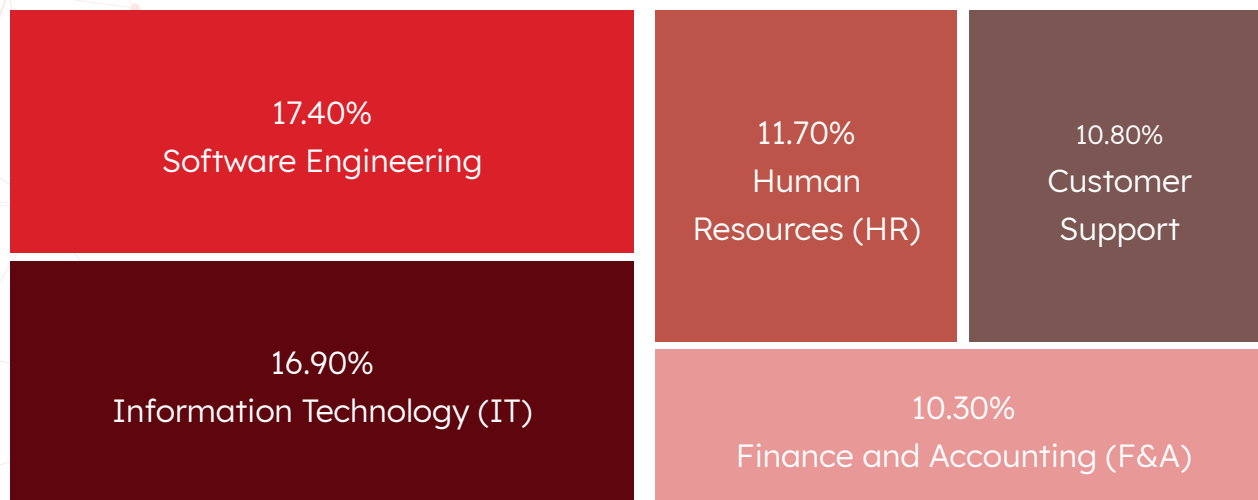
36% of GCCs have some discretionary component in their AI budgets

On average, 3-5% of AI budgets are discretionary, primarily used for use-case exploration and L&D

Insight 4:

AI initiatives focus is moving beyond Engineering and IT into Business Functions; GCCs focus is also shifting toward working closely with core business to drive Topline and Customer Impact

Q. Which of the following enterprise-level functions is the GCC contributing to in AI initiatives or projects?* (Top 5)



*Multi - Select Question

Software Engineering and IT dominate AI initiatives driven from the GCCs, making up 35% of enterprise initiatives

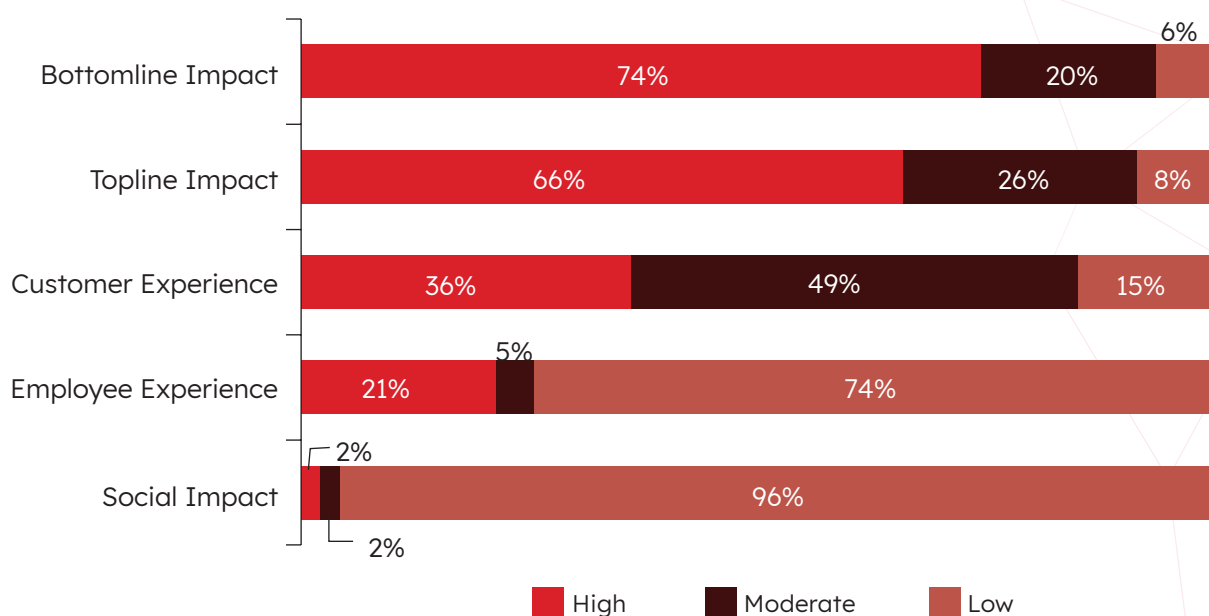
GCCs are also creating impact through AI for other functions like Customer Support, HR and F&A is also accelerating, driven by enterprise-wide transformation priorities

GCCs play a relatively lower role in developing AI across functions like Knowledge Process Outsourcing (KPO), Risk, Legal & Compliance, Procurement and Sales & Marketing





2. Rank the following objectives for your GCC in terms of their importance to the Enterprise AI strategy



Bottomline impact is the highest priority for AI initiatives driven from GCCs' focus on productivity, efficiency and cost optimization

GCCs are naturally positioned to own these initiatives due to their proximity to enterprise processes and workflows

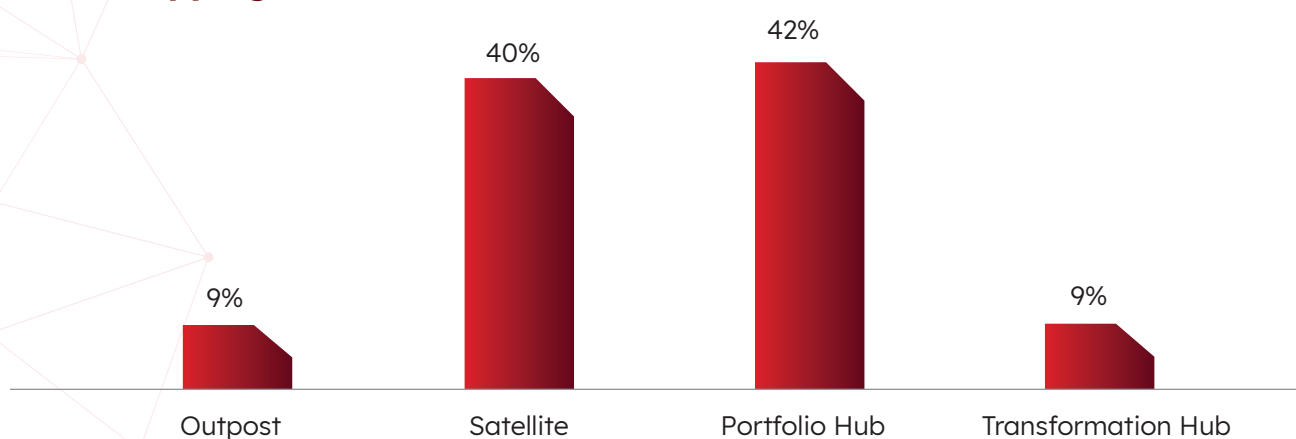
However, Topline and Customer Impact are rising priorities, signalling GCCs' shift toward revenue/growth outcomes

Capability Development

Key Insight:

GCCs are making strong efforts to build AI capabilities for the enterprise, investing in skilling, partnerships and adoption. However, limited domain expertise, limited co-innovation and change management that remains largely awareness focused are slowing the journey to scaled impact and adoption

Pillar Mapping:



Key Characteristics:

Parameter	Outpost	Satellite	Portfolio Hub	Transformation Hub
Skilling	No AI skilling strategy/systems in place	Generic AI training programs are rolled out	Role-based training strategy with mapped skilling pathways	AI skilling is embedded into workforce strategy and planning
Domain Expertise	AI/ML workforce has no domain expertise	Workforce starts developing domain understanding	Strong domain aligned talent embedded across priority areas	AI/ML workforce majorly comprises of domain experts
Change Management	Change management is largely absent for AI initiatives	Basic/awareness-led change enablement efforts are taken	Structured change management programs are integrated	Change management is institutionalized as a core transformation lever
Partnerships	No structured partnerships for AI initiatives	Experimental partnerships for exploration or staff-augmentation	Strategic partnerships, enabling co-development of AI initiatives	Long-term ecosystem partnerships supporting co-innovation

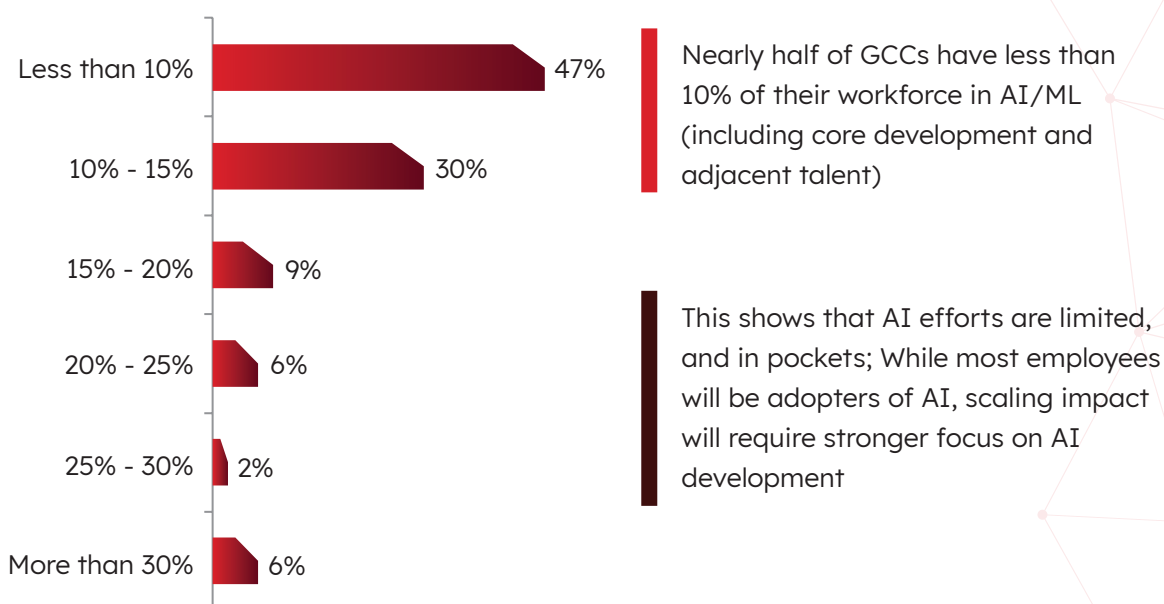
Insight 1:

GCCs are in the early stages of developing AI/ML capabilities with a strong focus on developing internal talent

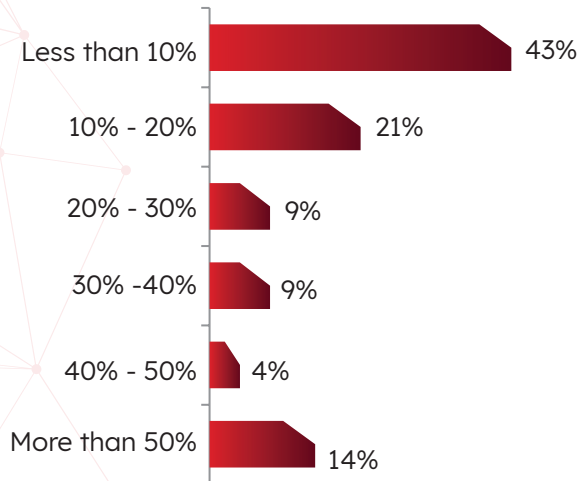
1. Rank the following strategies in the order your GCC relies on them to build its AI talent pool (Composite Score)



2. What percentage of the GCC's workforce is actively working on AI/ML initiatives? (Includes Developers, Designers, Governance Specialists, etc.)



3. Approximately what percentage of your AI/ML workforce at least has 5+ YOE across AI, ML, Data and Analytics?



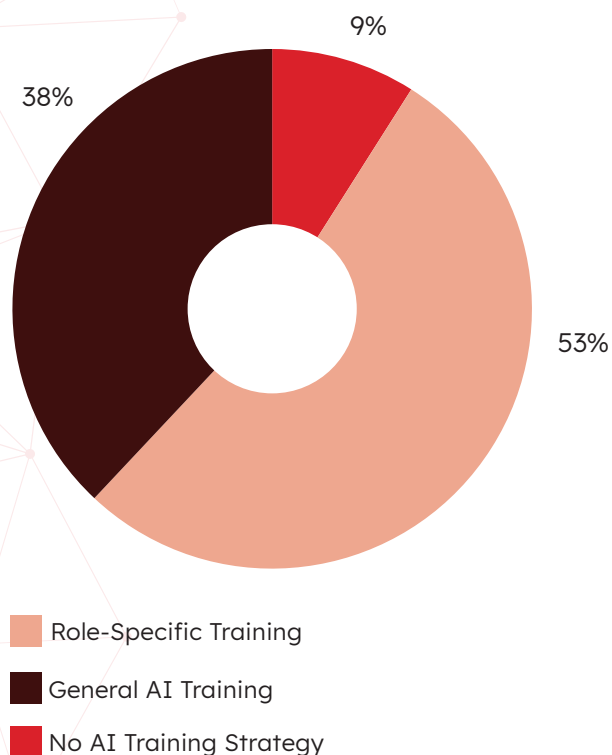
64% of GCCs have less than 20% senior AI/ML talent, compared to 30% which is typically seen in ER&D functions

As AI takes on more business-critical work, teams will need a stronger mix of experienced leaders and digital natives with an AI-first mindset

Insight 2:

While there is a strong focus on cross-skilling and training, lack of domain expertise among AI/ML workforce remains a crucial challenge to building impactful initiatives

1. What is the GCC's strategy for training and upskilling the workforce in AI capabilities?

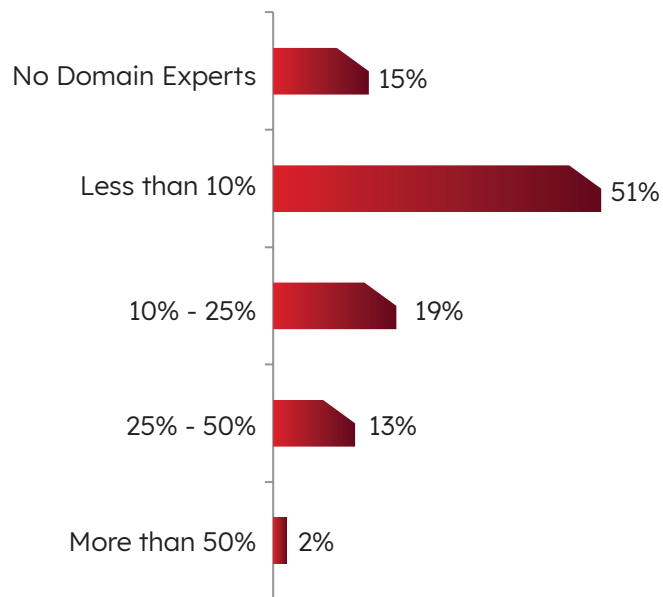


While generic training is widespread across GCCs, more than 50% GCCs have started to implement role-based trainings across a few capabilities

Organizations will need to build robust skilling maps, curated learning journeys and transformation plans for all their capabilities

Leading GCCs are also leveraging their partnerships with Universities, Tech Providers/Hyperscalers to embed AI learning programs

2. What percentage of employees in your AI/ML workforce are Domain/Business Experts?



66% of GCCs have limited to no domain expertise, limiting their ability to build contextualized AI solutions

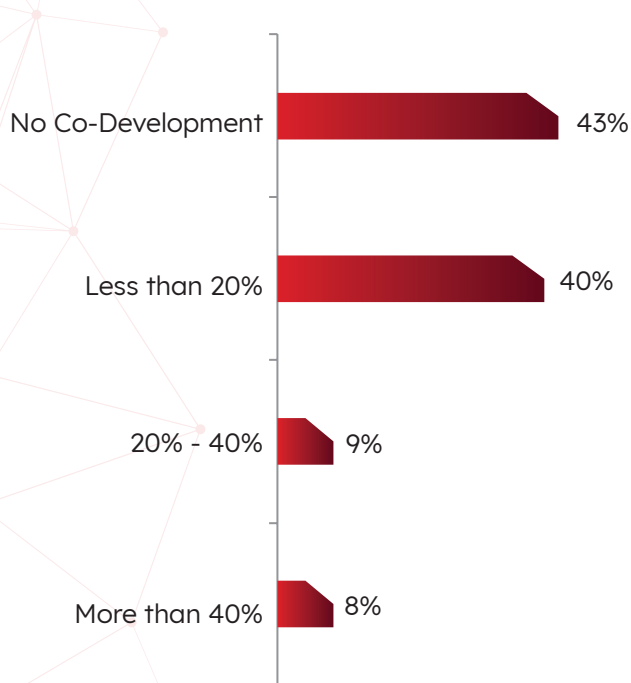
Hybrid and Decentralized teams show stronger domain depth as AI/ML capabilities sit closer to business functions

A strong focus on cross-skilling, equipping AI/ML talent with business/functional knowledge and vice versa can progressively narrow this gap

Insight 3:

Presence of AI/ML partnerships are widespread; however, they are mostly exploratory in nature, with limited co-development

1. What percentage of AI Projects/Initiatives currently in production were co-developed with external partners?

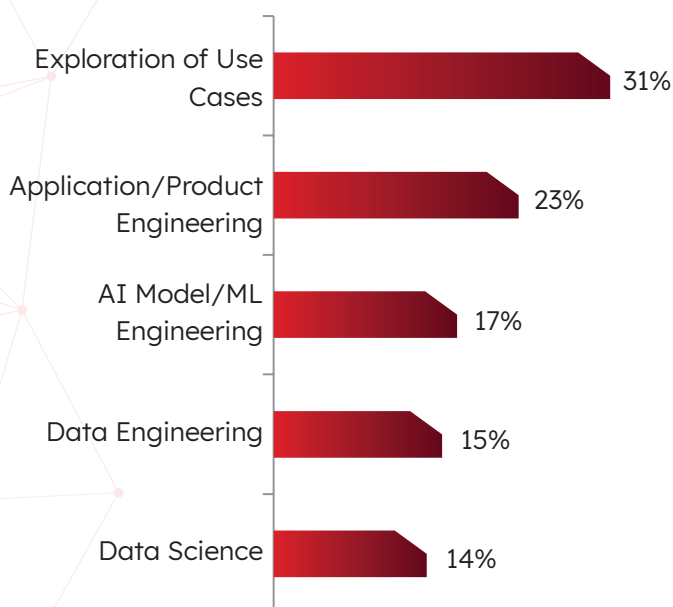


80% of GCCs have some form of AI/ML partnerships with Service Providers and Consulting Firms being the most common partner choices

Despite engagement, more than 80% initiatives underutilize partners – highlighting an opportunity to leverage service providers, startups, and universities to accelerate innovation

GCCs with strong AI co-development have done so through the presence of structured programs with partners and other mechanisms like Startup Accelerators, Incubators etc.

2. In which capability areas are you actively seeking new partnerships? (Top 5)



GCCs leverage partners across the spectrum of defining, developing and implementing AI initiatives/solutions

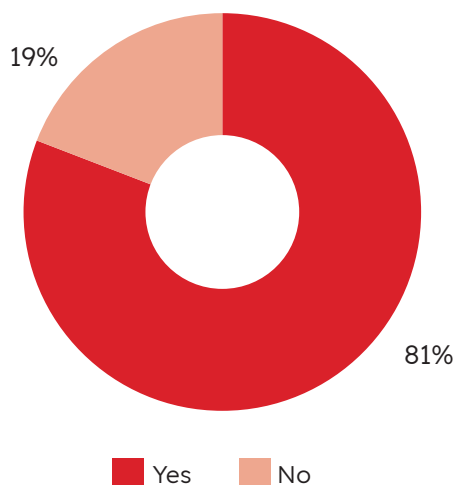
While exploration of use cases seems to be most common, portions of application development, model and data engineering are also areas where partnerships are explored

This again highlights an opportunity to build stronger capabilities and accelerate time-to impact by leveraging partners

Insight 4:

GCCs are investing in AI champions and awareness initiatives, but overall change efforts remain in nascent stages, and are largely awareness focused

1. Does the GCC have designated AI champions or change-adoption agents?

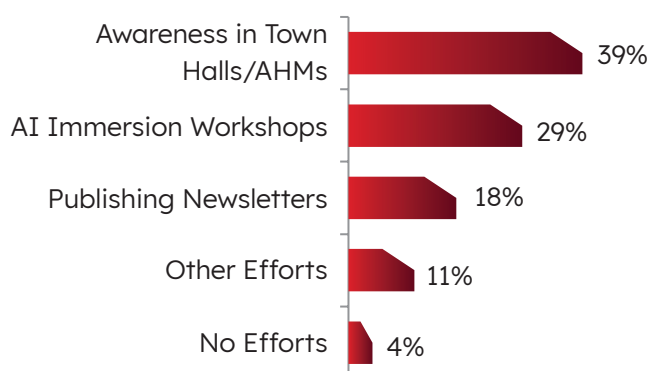


~80% of GCCs have institutionalized AI champions to help drive AI adoption

However, their mandates are often unclear and limited to driving awareness

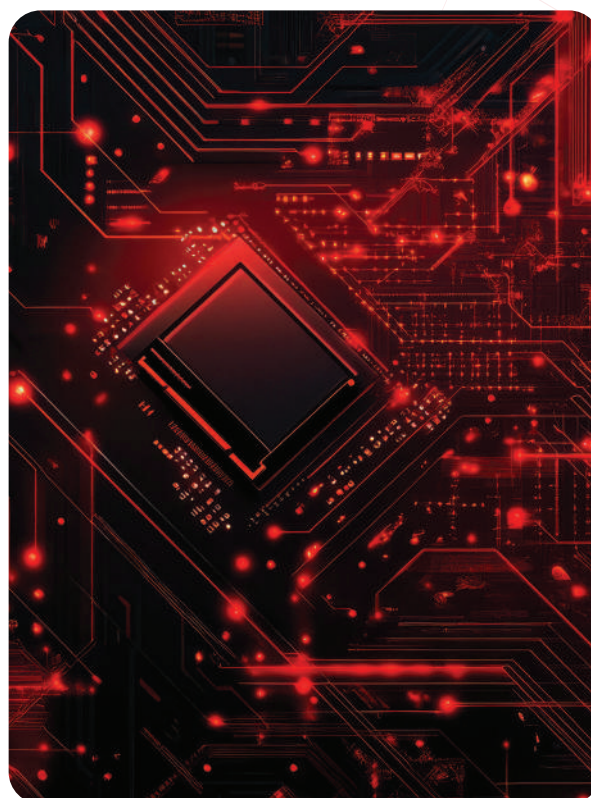
Organizations must empower champions with clear roles, tools and accountability to drive change

2. How is your GCC fostering an AI-first culture to drive AI adoption?*



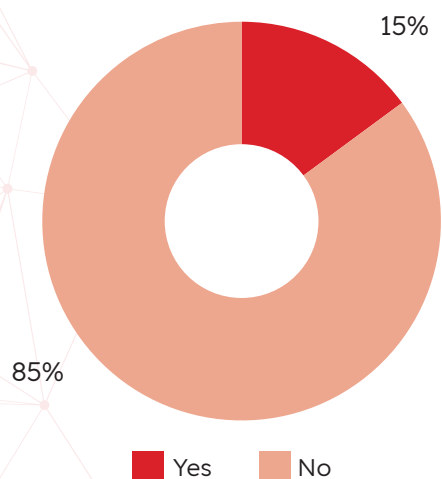
Change efforts are dominated by mechanisms like townhalls and workshops – activities that only drive awareness around AI

GCCs will have to move beyond low-touch mechanisms to deeper behaviour shifting interventions to drive meaningful impact



*Multi - Select Question

3. Does your GCC have Rewards and Recognition (R&R) programs to recognize employee contributions to AI/ML Initiatives/Projects?



Only 15% of GCCs have dedicated AI-focused R&R programs, despite growing focus on AI

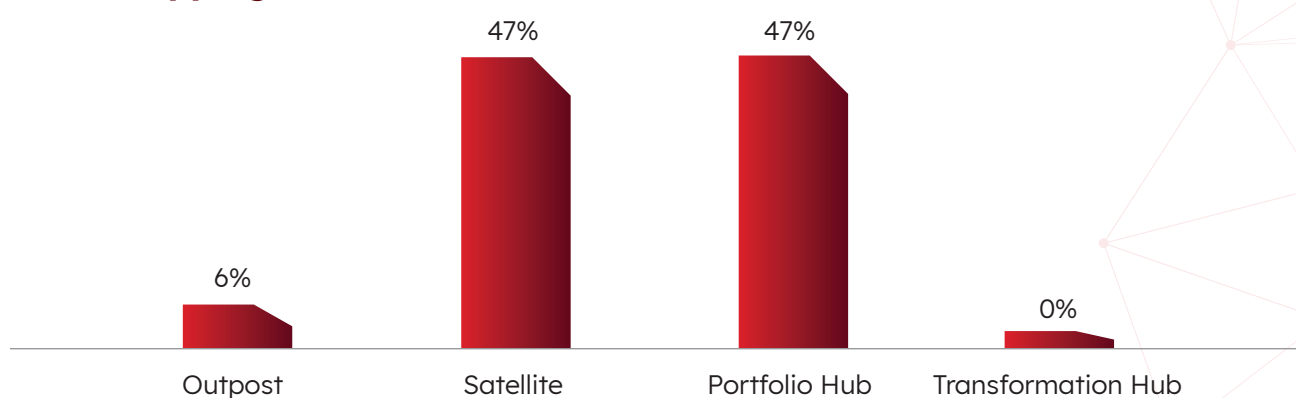
While AI projects are increasingly recognized through broader enterprise awards, the absence of AI-focused recognition may limit the motivation towards innovation in this area

Tech and Innovation

Key Insight:

GCCs are progressing toward broader tech ownership, however work remains focused on AI enablement – primarily across the application and integration layers with limited examples of core AI Research & Development

Pillar Mapping:



Key Characteristics:

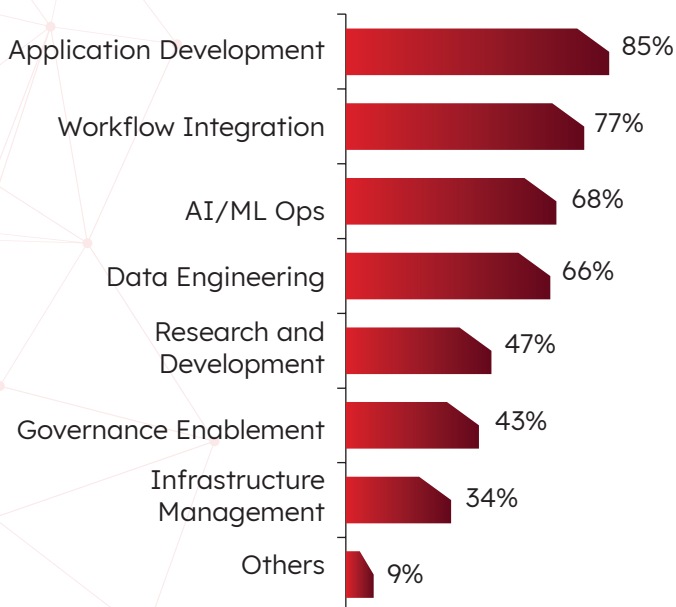
Parameter	Outpost	Satellite	Portfolio Hub	Transformation Hub
Technical Work	AI work limited to Application Development for use-cases	AI Enablement – across Application, Integration and Ops layers	Broad coverage across the tech stack over development and enablement	GCC owns end-to-end work across the tech value chain
Foundational Readiness	GCC has no influence over technological decisions/readiness		GCC drives technological readiness for AI initiatives	GCC has ownership over key technological decisions
Use-Case Progression	AI use cases are largely exploratory or experimental in nature	Select use cases progress into production on a case-to-case basis	A steady pipeline exists to move use cases from discovery to production	Use case progression is systematic, predictable and outcome-oriented
Structured Innovation	No presence of innovation efforts or programs	Ad-hoc innovation efforts with limited governance	Discovery programs with steady pipeline of PoCs	Structured innovation engines with pathways to scaling

Insight 1:

GCCs are slowly moving upward in terms of the work portfolio they own in AI; however, for the most part, work is still execution focused – highlighting an opportunity for greater ownership

1. What kind of AI work/solutions is the India GCC focusing on?

Q. What kind of AI work/solutions is the India GCC focusing on*



*Multi - Select Question

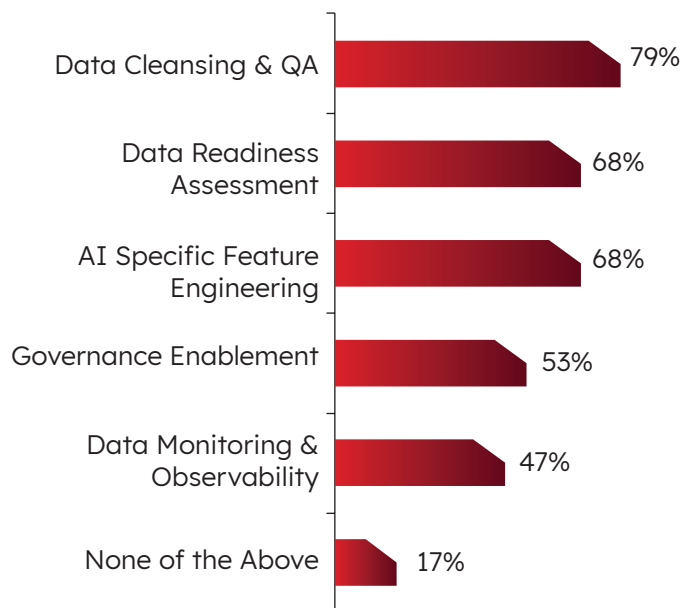
Most GCCs remain focused on AI enablement activities, with Application Development and Workflow Integration dominating the portfolio

GCCs' role in core R&D, Model Development/ Fine-Tuning is very limited, and will be a critical area to build capabilities

Only 19% of GCCs are driving work end-to-end across the tech stack, more prominent among Centralized and Hybrid teams

2. Building Technological Foundations

a. Which of the following activities does the GCC perform to improve the data readiness for AI*



*Multi - Select Question

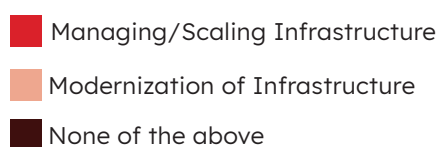
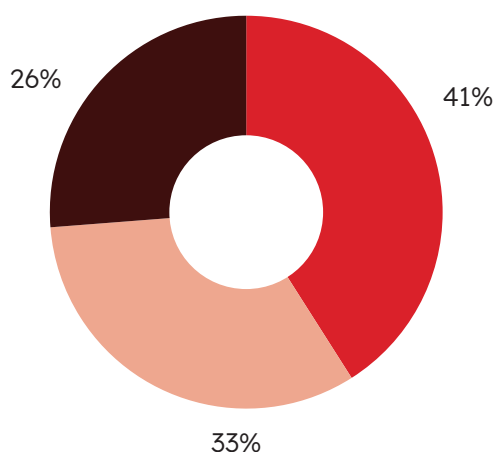
GCCs are playing a pivotal role in strengthening enterprise data foundations, through activities like Cleansing, Readiness Assessments and Feature Engineering

While key infrastructure decisions lie in the HQ, GCCs contribute to infrastructure readiness through their involvement in managing and modernization efforts

These activities demonstrate GCCs' growing role in building essential foundations that enable enterprise AI

Building leadership in these areas can further enable the GCC to drive key transformation initiatives for the enterprise

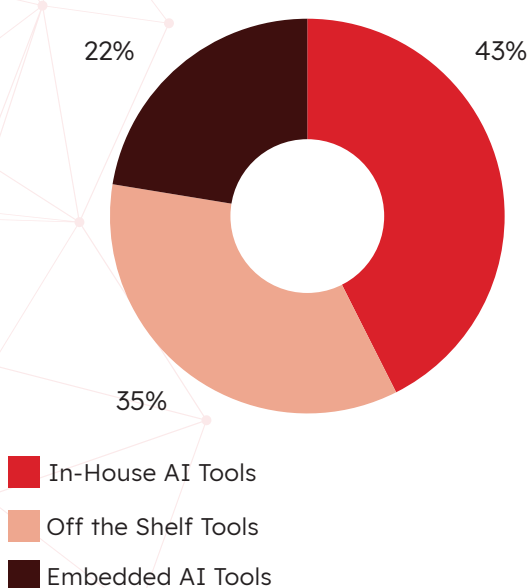
b. Which of the following infrastructure decisions does the GCC have the authority to make?



Insight 2:

GCCs are rapidly expanding their role and scope of In-House Generative/Agentic AI solutions, however, use cases mostly remain in early stages of development

1. What percentage of AI use cases developed in the GCC are enabled by the following solution types?



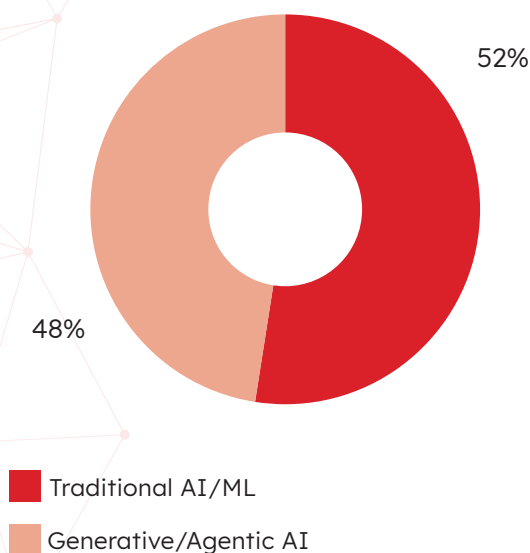
Enterprises are prioritizing In-House AI tools, signalling demand for tailored, enterprise specific solutions and adaptability

This in turn demands relevant talent and capabilities, needed to speed up development

Off the Shelf and Embedded tools are being selectively adopted basis need and demonstrable impact

2. Use Case Type and Progression

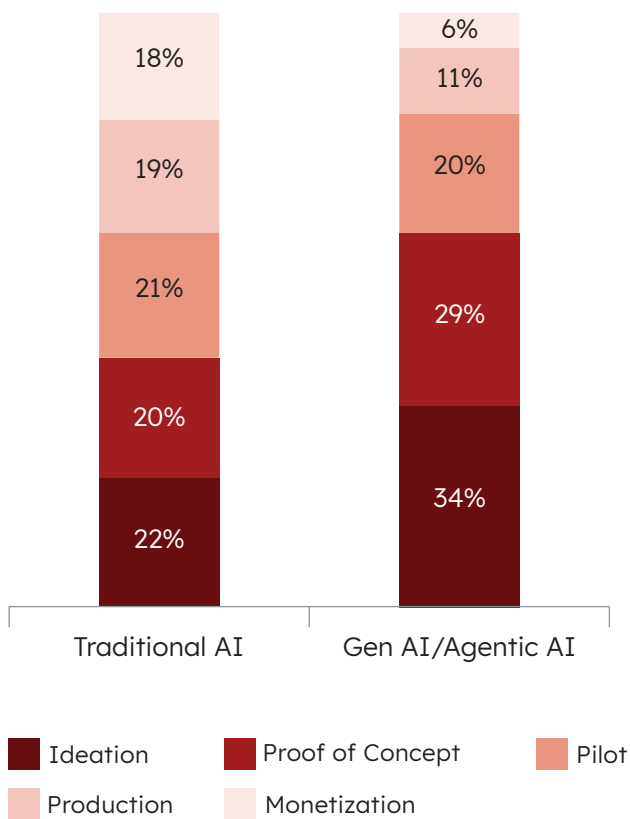
a. What percentage of GCC's AI use cases are split across Traditional AI vs Generative/Agentic AI?



Generative/Agentic AI use cases are nearly equally represented in GCC portfolios, showcasing its rapid growth to being a core part of enterprise innovation

Many Gen/Agentic AI use cases are also being built on top of Traditional AI use cases

b. What percentage of GCC's AI use cases are in the following stages of development?



Traditional AI use cases represent a matured portfolio with 37% use cases in production or monetization, providing the foundational ROI

Gen AI/Agentic AI largely remains in experimentation stages with 63% use cases in Ideation or PoC stages

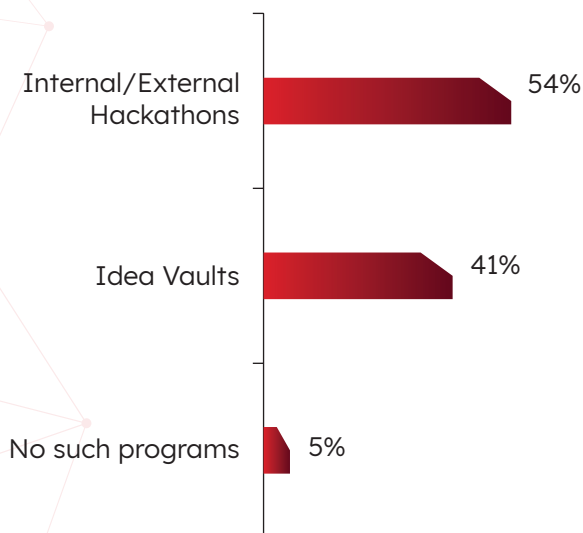
However, the drop off in Gen AI/Agentic AI use cases beyond pilots highlights the need for better scaling frameworks

Insight 3:

While GCCs are taking steps towards innovation programs, outcomes remain limited, highlighting the need for structured pathways to impact

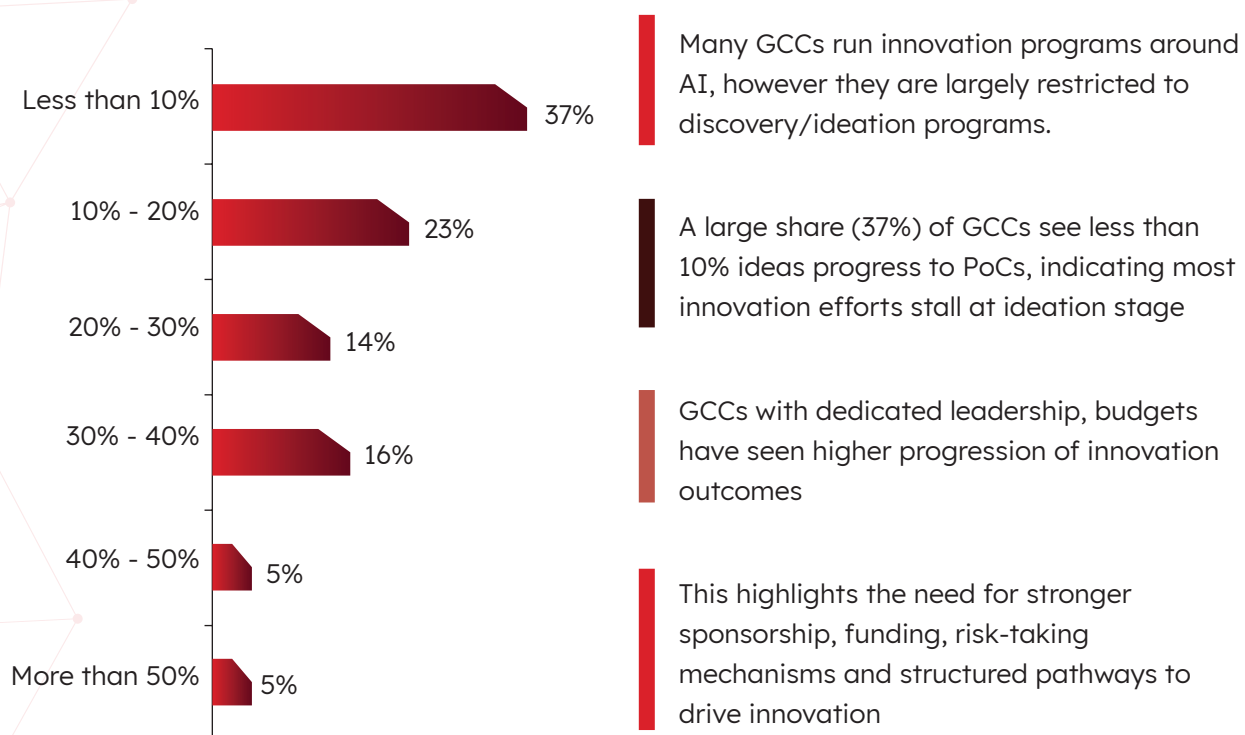
1. Innovation Programs and Progression

a. Which of the following Innovation programs does the GCC conduct with a focus on AI*

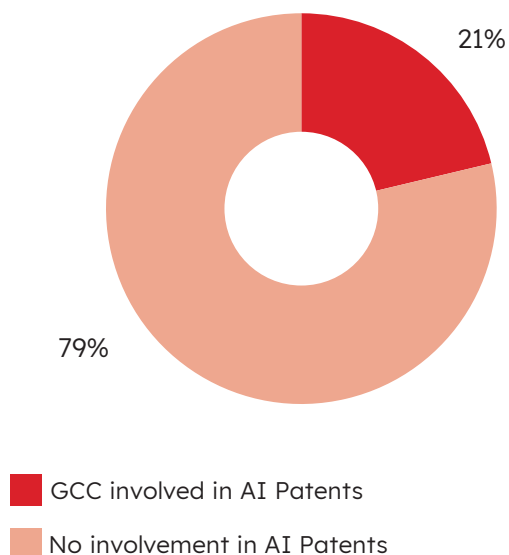


*Multi - Select Question

b. What percentage of ideas generated through these programs have progressed to the Proof of Concept (PoC) stage?



2. Is the GCC involved in developing AI-focused patents/IP?



Only 21% of GCCs are involved in IP creation from India; indicating that innovation largely remains exploratory or incremental

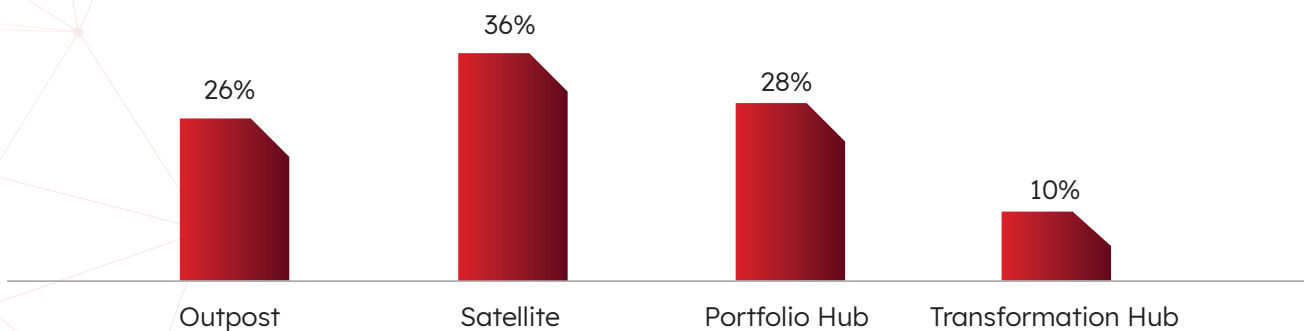
This also highlights that most AI initiatives driven from the GCC are internally focused; Driving core Research and Development that is domain/business-aligned will be essential to improve these outcomes

Governance and Risk

Key Insight:

While governance remains largely top-down, GCCs are beginning to operationalize Responsible AI through local committees and training programs. GCCs will need to deepen governance integration to enable responsible scaling

Pillar Mapping:



Key Characteristics:

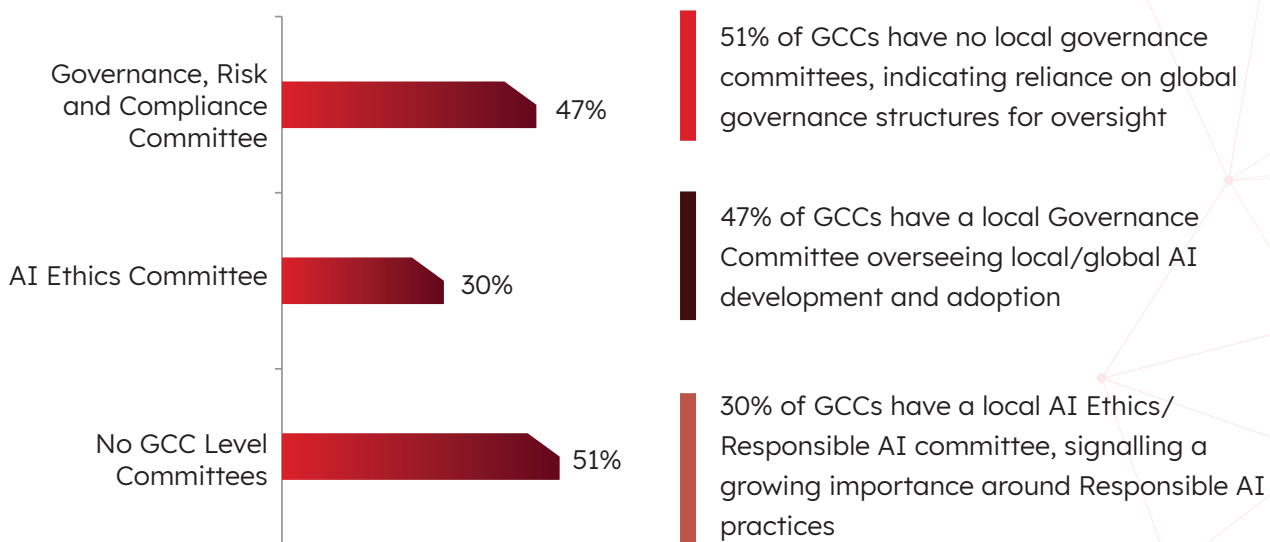
Parameter	Outpost	Satellite	Portfolio Hub	Transformation Hub
Governance Structures	AI Governance is implicit, driven by enterprise policies	Initial AI governance forums, review mechanisms are established	Formal governance structures with defined decision rights are established	GCC plays a central role in enterprise-wide governance/oversight
Responsible AI (RAI)	No efforts toward Responsible AI development	RAI efforts are largely awareness focused	RAI practices are embedded into AI development and deployment	RAI is operationalized end-to-end, across lifecycle, risk and compliance
Ecosystem Governance	Vendor/Ecosystem governance efforts for AI are non-existent		GCC extends governance enforcement to external partners	GCC defines and governs enterprise-wide AI ecosystem standards

Insight 1:

While Governance, Risk and Compliance is a central, top-down mandate, GCCs play an increasingly meaningful role in operationalizing Responsible AI

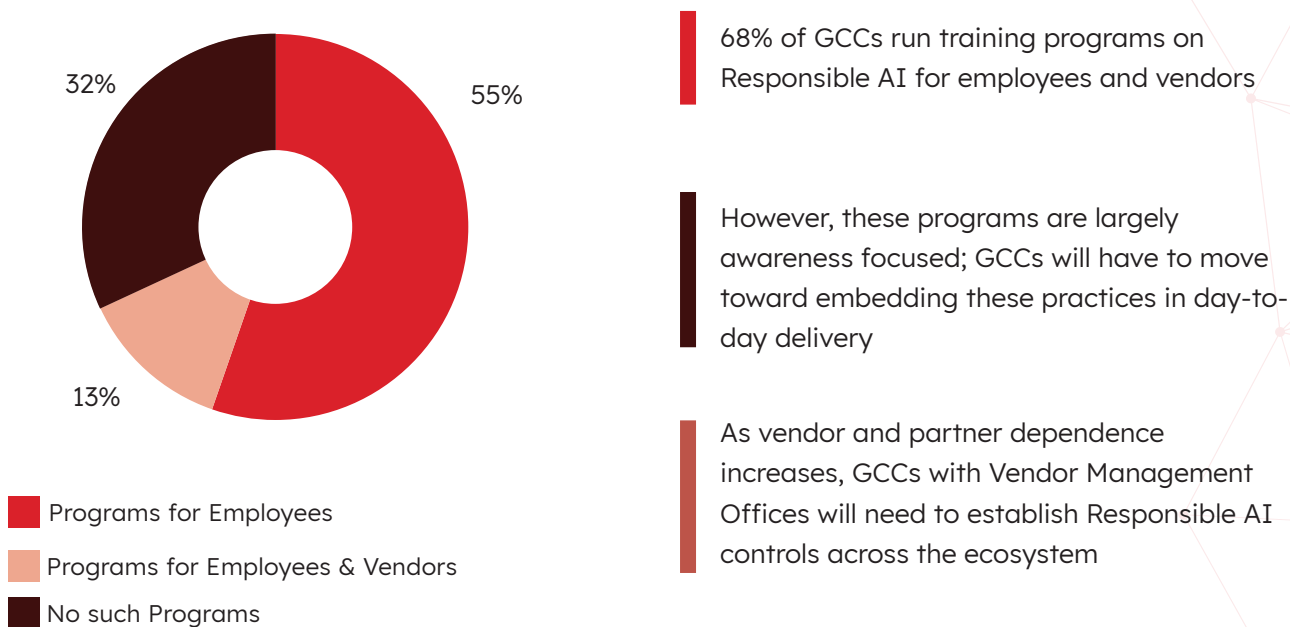
1. Which of the following committees does the GCC have to govern AI Development, Deployment, and Adoption?

Q. Which of the following committees does the GCC have to govern AI Development, Deployment, and Adoption*



*Multi - Select Question

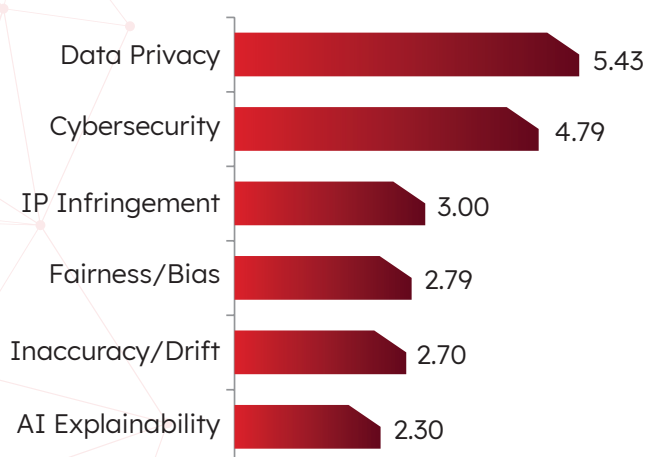
2. Does your GCC run awareness/training programs on Responsible/Explainable AI to foster stakeholder trust in adoption of AI solutions?



Insight 2:

The rise of AI has intensified focus on enterprise risks such as privacy and security, while AI-specific model risks are starting to be understood

1. Rank the following risk areas based on their level of priority in your enterprise's AI strategy (Composite Score)



Privacy, Cybersecurity and IP Infringement continue to be the top risks enterprises are focused on in their AI journey

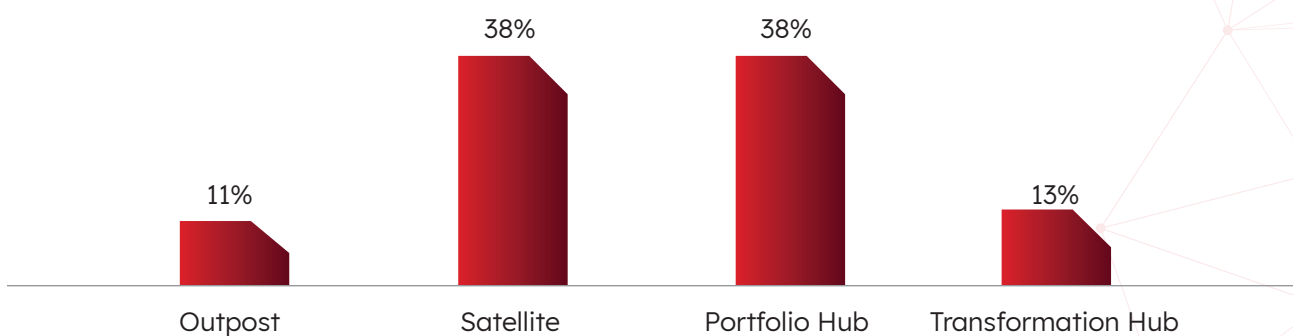
This highlights how traditional enterprise risks have gained further relevance in the world of AI, while AI specific risks are a growing area of focus

Impact

Key Insight:

GCCs are emerging as key drivers of AI impact, yet limited lifecycle ownership remains a hindrance to scale solutions and drive broader enterprise value

Pillar Mapping:



Key Characteristics:

Parameter	Outpost	Satellite	Portfolio Hub	Transformation Hub
Business Impact	AI impact is limited to isolated experimentation gains	Measurable efficiency and productivity improvements begin to emerge	AI drives tangible bottomline and selective topline impact	AI becomes a core driver of revenue growth, customer experience and transformation
AI Adoption	Adoption is limited to technical specialists or isolated teams	AI usage extends to select business function	AI is systematically embedded across business functions and value streams	AI is embedded across enterprise workflows with an AI-first mindset
Ownership	Accountability for outcomes does not lie at the GCC	GCC owns delivery but has limited accountability over outcomes	GCC is accountable for use case performance and operational outcomes	GCC owns end-to-end AI lifecycle accountability

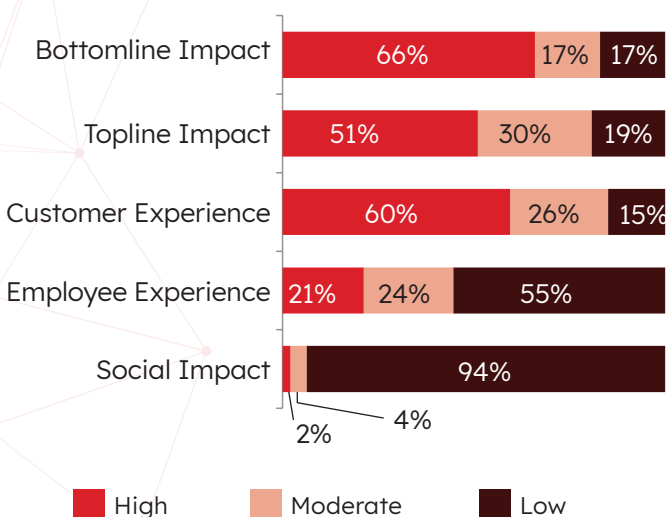
Insight 1:

GCC led AI initiatives are driving Bottomline impact through productivity gains, however outliers are beginning to demonstrate Topline and Customer Experience impact through AI enabled products and services

1. GCC AI Adoption and Impact

a. Rank the areas of value addition achieved from AI Initiatives undertaken by the GCC

Q. Where is AI being used by more than 30% of GCCs employees in their daily use?*

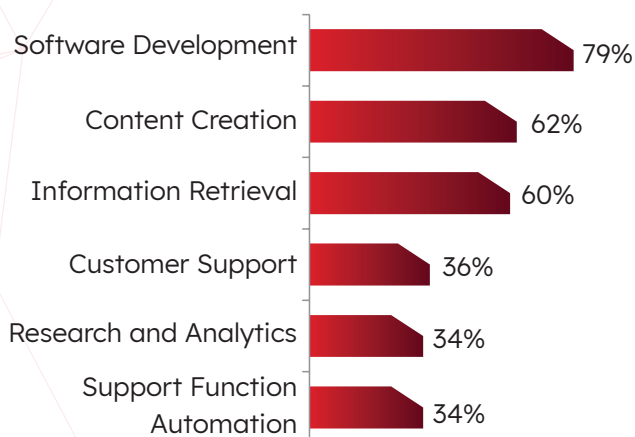


*Multi - Select Question

Majority of GCC driven AI initiatives are delivering Bottomline Impact, particularly through productivity improvements

Some GCCs demonstrate Topline Impact and Customer Experience uplift, through integration of AI into products or development of new AI-driven offerings

b. Where is AI being used by more than 30% of GCCs employees in their daily use?



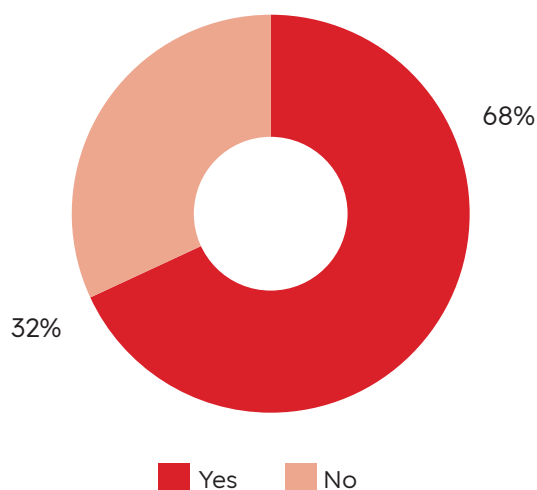
AI enabled productivity improvement has been prominent in areas like Software Development (SDLC), Information Retrieval, Content Creation, and Research & Analytics

AI adoption within GCCs has been skewed toward Software Development use cases, with comparatively lower penetration across support/enterprise functions

Insight 2:

GCCs are supporting a broad global AI portfolio, but limited end-to-end ownership is constraining scale and high-impact outcomes

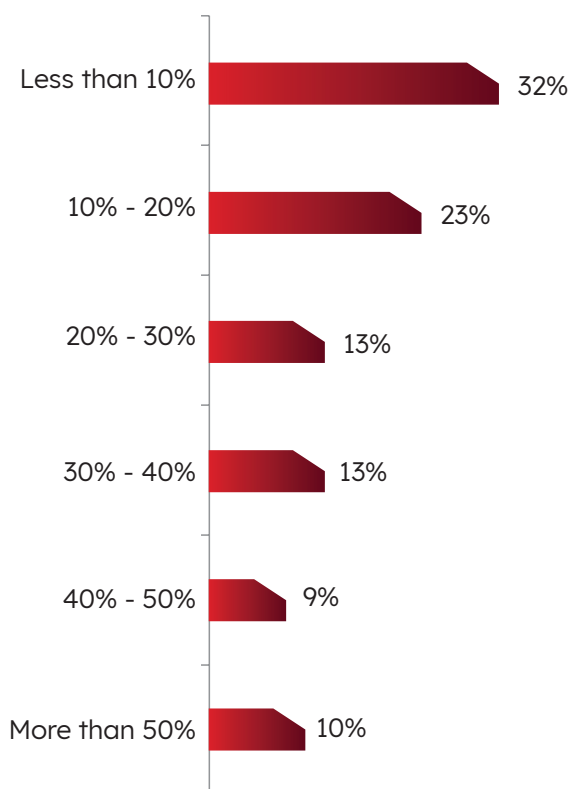
1. Does the India GCC actively support global subsidiaries of the enterprise in their AI initiatives?



68% of GCCs actively support AI initiatives across global subsidiaries of the enterprise, indicating wider involvement in the enterprise portfolio

This indicates GCCs' increasingly important role in execution and delivery of AI initiatives across subsidiaries and markets

2. What percentage of AI Initiatives/Projects undertaken by the GCC are owned end-to-end?



End-to-end ownership at the GCC level remains limited; most centers contribute to specific components rather than managing full-lifecycle AI initiatives

Certain outliers have taken up strong end-to-end ownership within their defined scope over defining vision, development initiatives, and P&L accountability.

These GCCs function as hubs for the AI initiatives they own, enabled by strong leadership, dedicated budgets, strong domain expertise and change adoption mechanisms

Conclusion

Conclusion •

Indian GCCs are at an inflection point - the question is no longer whether to invest in AI, but how to build programs that scale and deliver measurable enterprise value

Where GCCs Stand Today

GCCs have made meaningful progress in AI adoption and development - with active portfolios, rising investment, and growing leadership attention. Experimentation is widespread and energy is high.

However, most GCCs remain in the early-to-mid stages of their AI journey. The shift from scattered PoCs to AI as a sustained driver of enterprise value is well underway, but not yet complete.



The Way Forward



Scaling AI maturity requires deliberate, coordinated interventions across all 5 pillars of maturity - from how AI ambition is defined, to how capabilities are built, technology is leveraged, innovation is governed and impact is measured and owned.



GCCs that have made the leap to higher maturity stages have done so by making simultaneous, coordinated investments across all these dimensions, not by optimizing one in isolation



This in turn demands resolving the critical gaps that are slowing progress today - building strong AI leadership and a GCC-owned mandate, deepening domain expertise to move beyond generic use cases, driving change adoption across the organization, proactively enabling technological readiness, forging outcome-oriented partnerships, and fixing broken innovation pipelines where ideas get stalled

Our Playbook - Becoming Hubs for AI Transformation, aims to address these challenges, providing GCC leadership with a comprehensive, action-oriented guide to scaling AI capabilities across each pillar, with frameworks, decision tools, and proven practices drawn from leaders across the ecosystem.

Appendix

Glossary

Terminology	Definition
AI	AI here refers to Traditional AI (Descriptive, Diagnostic, Predictive and Prescriptive Analytics), Generative AI, and Agentic AI
Agentic AI	AI systems capable of autonomously planning and executing multi-step tasks, taking decisions and actions with minimal intervention to achieve a defined goal
AI Champion	An employee designated to advocate for and drive AI adoption within a business unit or function
AI Charter	A charter defines the mandate, scope, and accountability for AI at the GCC level
AI Roadmap	A roadmap is the sequenced plan of initiatives, milestones, and investments that operationalize the AI charter
Discretionary Budgets	Budgets that are at the GCC AI Leadership's disposal to explore/ experiment on AI Initiatives as they see fit
Domain Expertise	The depth of business, process and industry specific knowledge within the GCC's talent
Embedded AI Tools	AI capabilities that come pre-integrated within non-AI-native enterprise platforms and products
Enterprise	Enterprise here refers to the parent organization of the GCC
Explainability/ Interpretability	The ability to describe how and why an AI model arrives at a specific decision or output in a way that is understandable to human stakeholders
Fairness/Bias	Errors in AI model outputs that arise from flawed assumptions in training data or model design, leading to unfair or inaccurate results for certain groups or scenarios
Foundational Readiness	The degree to which a GCC has established the data, infrastructure, and technology capabilities necessary to build, deploy, and scale AI initiatives reliably
Global Capability Center	Offshore service units established by Multinational Corporations that performs strategic functions, leveraging talent, cost and operational efficiencies

Terminology	Definition
Generative AI	A class of AI models capable of generating new content - including text, code, images, and audio by learning patterns from large datasets
Hyperscaler	A large cloud infrastructure provider that offers scalable computing, storage, and AI/ML services used to underpin enterprise AI workloads
In-House AI Tools	Proprietary AI solutions built and owned by the enterprise, typically involving fine-tuned models or ground-up development tailored to specific business contexts
Maturity	A measure of how systematically and effectively an organization develops, deploys, and derives value from AI
Off-the Shelf Tools	Commercially available, ready-to-deploy AI products or platforms procured to address specific enterprise needs basis demonstrated impact
Responsible/Ethical AI	Steps taken to ensure the development and adoption of AI is safe, fair, transparent and reliable
Traditional AI	Established machine learning techniques that learn patterns from labelled or structured data, distinct from newer generative or deep learning models.
Use Case	A specific, defined application of AI to solve a business problem or create value
Value Chain	The sequence of activities involved in creating and delivering an AI initiative, spanning ideation, development, deployment, and impact measurement
Vendor Management Office	A centralized function responsible for managing relationships, contracts and compliance across the organization's network of vendors and service providers

List of Abbreviations

Abbreviation	Expansion
AHM	All Hands Meeting
AI	Artificial Intelligence
APAC	Asia-Pacific
Bn	Billion
BU	Business Unit
CAIO	Chief AI Officer
EMEA	Europe, Middle East and Africa
ER&D	Engineering Research and Development
GCC	Global Capability Centers
HQ	Headquarters
IP	Intellectual Property
LATAM	Latin America
L&D	Learning and Development
LLM	Large Language Model
ML	Machine Learning
P&L	Profit & Loss
PoC	Proof of Concept
R&D	Research and Development
R&R	Rewards and Recognitions
RAI	Responsible AI
ROI	Return on Investment
SDLC	Software Development Lifecycle

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Founded in 2002, Zinnov is a leading global management consulting and strategy advisory firm, with a presence in 10 global locations including New York, Seattle, Santa Clara, Houston, Paris, Gurgaon, Bangalore, Hyderabad, and Pune. In the last 24 years, Zinnov has worked closely with Global Enterprises and Fortune 2000 companies across their value creation journeys and helped them develop actionable insights - across revenue, talent, innovation, scale, and optimization. With core expertise in Product Engineering, Digital Transformation, Innovation, and Outsourcing Advisory, Zinnov enables companies to develop and optimize a global engineering footprint through center setups, and technology and functional Centers of Excellence (COEs), portfolio optimization, partnerships, and real-time data and insights - through its unique GCC Accelerator Platform (GAP) offering.

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Tiger Analytics is a global leader in AI and analytics, helping Fortune 1000 enterprises embed intelligence at the core of their operations. Founded in 2011 and headquartered in Santa Clara, the company brings together deep expertise in data science, advanced analytics, and full-stack AI to solve complex business challenges and deliver outcomes with certainty.

With a team of over 6,200 professionals across the US, Canada, the UK, India, Singapore, Spain, Mexico, and Australia, Tiger Analytics partners with Fortune 1000 companies across industries including CPG, retail, financial services, manufacturing, healthcare, and life sciences. Its vision is to enable AI-embedded enterprises, where intelligent agents power data platforms, business processes, and decision-making systems that help organizations move forward decisively. Recognized by leading analyst firms and certified as a Great Place to Work™, Tiger Analytics continues to push the boundaries of what AI can achieve to deliver business value at scale.

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