



Navigating the skills imperative for India's GCCs in the AI era

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As AI reshapes business models and transforms the very nature of work, the next chapter of India's GCC growth story will be defined by how innovatively the country creates enterprise capabilities and solutions for the world, reveals a PwC India-FICCI study.



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Foreword



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India is entering a new phase of economic transformation where technology, talent, and innovation will define long-term competitiveness. Global capability centres (GCCs), powered by artificial intelligence (AI) and digital technologies, are no longer merely centres of operational excellence—they are evolving into global hubs for innovation, product development, and enterprise leadership. This transformation presents India with a unique opportunity to strengthen its position as the world's leading destination for high-value knowledge, innovation, and digital capabilities.

As GCCs continue to expand their strategic role, the demand for future-ready talent is changing rapidly. Organisations today require professionals who combine domain expertise with AI capabilities, digital fluency, critical thinking, and problem-solving. Building these capabilities at scale will be essential for sustaining India's leadership in the global knowledge economy and realising the vision of Viksit Bharat 2047.

This report comes at a critical juncture. It examines the evolving GCC landscape, the emerging skills imperative in the AI era, and the collaborative actions required across industry, government, academia, and the skilling ecosystem to build a resilient and future-ready workforce. It also presents practical recommendations to strengthen talent pipelines, deepen industry-academia partnerships, accelerate workforce transformation, and position India as the preferred destination for global capability and innovation.

At FICCI, we believe that India's demographic dividend, supported by strong public-private collaboration and a culture of lifelong learning, can become one of the country's greatest competitive advantages. As technology continues to reshape the future of work, our collective focus must remain on creating an inclusive, agile, and globally competitive workforce capable of driving innovation, productivity, and sustainable economic growth.

We extend our sincere appreciation to the industry leaders, policymakers, academia, and all stakeholders who have contributed their valuable insights to this report. We hope this publication serves as a valuable resource for businesses, educators, and policymakers as they work together to strengthen India's talent ecosystem and shape the next chapter of India's growth story.

Foreword



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GCCs have quietly emerged as a structural moat that positions the country as an indispensable engine of enterprise intelligence in the AI era.

Consider the trajectory. What began in 1985–86 with a single semiconductor company's offshore office in Bengaluru¹ has evolved into a USD98 billion ecosystem employing 2.36 million professionals across more than 2,100 centres.² GCCs today have migrated from providing transactional back-office support to shaping enterprise strategy and outcomes spanning advanced analytics, product engineering, cybersecurity, AI research and development, and increasingly, global P&L mandates. One in five GCCs is targeting full business-outcome responsibility by 2030. This is no longer offshoring. This is ownership.

What makes this evolution remarkable is its velocity. The pandemic served as an accelerant, proving that distributed, India-based teams could seamlessly operate mission-critical systems. Physical proximity was never the binding constraint; talent density was. It is this concentration of talent that enabled India to emerge as a critical engine of global enterprise value creation.

And yet, we are now at an inflection point. As large global and Indian enterprises reconfigure their operating models around AI, a consequential opportunity is unfolding, but so is a demanding test. The research presented in our report, based on a survey of 200 senior GCC executives across eight industries, reveals a compelling blend of confidence and urgency. Nearly 90% of leaders are confident India will retain its global GCC leadership through 2030. But that confidence is contingent on whether the ecosystem comprising industry, government, academia, and technology partners can build composite capabilities at the speed and scale the AI era demands.

¹ PwC, Catalysing value creation in Indian global capability centres

² Business Standard, India's GCCs are increasingly leading the AI mandate for global enterprises, driving global value creation (accessed as of 27 July 2026)



The findings are instructive. Unresolved talent and skills gaps are constraining annual value creation by up to 10%. Left unaddressed, they could put as much as 19.3% of future sector value at stake by 2030. Leadership AI literacy remains alarmingly low: only 27% on average across GCC leadership teams. The average time-to-productivity for new hires stands at nearly nine months. These are not abstract concerns. They represent real friction between ambition and execution.

The path forward is clear in principle, although demanding in practice. GCC leaders are building talent pipelines around what we refer to as 'composite skills': a combination of frontier AI capabilities in data engineering, machine learning, and cybersecurity with foundational competencies in domain expertise, business judgement, and strategic leadership. One without the other is incomplete. Together, they create the architecture of AI-native enterprises capable of translating technological ambition into durable business value.

India enters this transition from a position of considerable strength. It is home to 28% of the world's STEM talent,³ ranks highly on the Stanford AI Skill Penetration Index, and has demonstrated its ability to build and scale digital infrastructure at population scale through the Digital India programme. It is now for the ecosystem to translate these advantages into sustained innovation leadership before the window of opportunity begins to narrow.

This act of leveraging the advantages will define the next chapter of India's GCC growth story. Success will be measured by how decisively India helps shape the world. The ambition must be to ensure that a growing share of the world's ideas, patents, products, algorithms, and enterprise capabilities are not only conceived, engineered, and led from India, but also owned by India. The nations that lead the AI era will be those that build talent ecosystems at scale. India has every reason—and every resource—to be the first among them.

3 Economic Survey 2024-25





Executive summary

From capability to leadership: The next chapter of India's GCC story

“ Our aspiration is not merely to host the world's global capability centres, but to shape next-generation technologies and products and enterprises of the future. So, this is how India moves from capability to leadership.”⁴

- Finance Minister Nirmala Sitharaman

India's GCC growth story is at an inflection point. Today's GCCs have evolved beyond back offices to emerge as global hubs for innovation, product development, and enterprise leadership. This is a journey being reshaped and supercharged with the advent of AI. Realising this potential will require a fundamental reimagining of workflows, leadership models, talent strategies, and skilling ecosystems, enabling GCCs to operate at the convergence of human ingenuity, deep domain expertise, and technological innovation.

Based on a survey of 200 senior GCC executives across eight industries, this PwC India-FICCI study reveals that GCC leaders are already preparing for this imperative. While 90% remain confident that India will retain its global GCC leadership position through 2030, that confidence is contingent on targeted interventions and coordinated action across industry bodies, technology providers, governments, academia, and the broader talent ecosystem.

At the same time, there is a strong recognition that AI will fundamentally reshape the nature of work across sectors. Around 86% of GCCs expect AI integration to drive substantial or transformational change by 2030. As organisations move beyond experimentation towards scaled adoption, the demand is shifting from standalone technical expertise to composite capabilities that combine frontier AI skills with foundational skills such as deep domain knowledge, business acumen, and human judgement.

⁴ The Economic Times, India wants to lead, not just host, GCCs: Nirmala Sitharaman (accessed as of 27 July 2026); Nirmala Sitharaman's address





Composite capabilities: The new source of competitive advantage for GCCs

Domain knowledge, domain-specific AI expertise, problem-solving, structured thinking, AI/ML engineering, and digital fluency emerge as the capabilities that will distinguish leaders from followers in the AI era. Together, these skills will determine how effectively GCCs translate AI ambition into sustained, enterprise-wide value creation.

However, while ambition is high, readiness remains uneven. A significant challenge emerging from our research is that AI aspirations are outpacing leadership preparedness. Over 90% of GCCs report that no more than 40% of their leadership teams currently possess adequate AI literacy for strategic decision-making. This points to a critical gap: Without AI-fluent leaders who can make informed choices on strategy, investments, governance, risk, and workforce transformation, GCCs may struggle to convert AI potential into measurable business outcomes.

The talent challenge is equally urgent. While GCCs can access talent, a significant amount of time and effort is required to make this talent AI-ready from an industry lens. The research indicates an average time-to-productivity of 8.69 months before new entrants begin generating tangible value. This underscores the need for more deliberate, structured, and sector-relevant skilling pathways that can accelerate workforce readiness and reduce the lag between hiring, training, and business impact.

Generating value through skills transformation

The scale of the opportunity is substantial. Today, GCCs have the potential to unlock an additional 7.83% of value or revenue annually by addressing critical skill gaps. This figure could expand to 19.32% of total sector value or revenue by 2030. As AI reshapes business models and work itself, skilling is emerging as one of the most powerful levers for growth, innovation, and competitive advantage. Recognising this, eight in ten GCCs believe decisive action is needed within the next 12 months to strengthen capabilities across workforce, managerial, and leadership levels. Those that move early will be best positioned to transform talent investments into sustained enterprise value and AI-led growth.

GCCs are responding through a range of internal and external interventions, though priorities vary by sector and maturity. Internally, partnerships with online learning platforms, AI/ML reskilling cohorts, and hackathons have emerged as leading approaches to address capability gaps. Externally, GCCs are relying most on technology platforms, premier academic institutions, and global headquarters' (HQs') talent investments to strengthen their talent development ecosystems. This signals a clear shift towards a more networked model of capability building, where enterprises cannot rely solely on internal training architectures but must actively tap into broader learning, technology, and institutional ecosystems.





The path to sustainable AI-powered growth

Looking ahead, GCCs are clear that talent investment will need to rise significantly. Current annual talent investment budgets, which are typically around 3% of operating budgets, may need to double to at least 6% to build capabilities relevant to the AI era. Notably, 94% of leaders indicate the need to invest at least 6%, while 27% expect talent investments to exceed 8% of operating budgets. This step-up will be essential if GCCs are to attract high-quality talent, accelerate reskilling, build leadership readiness, and create value in an increasingly AI-led enterprise environment.

As AI reshapes the world of work, success will depend on cultivating a workforce that combines frontier capabilities in AI, data, and emerging technologies with enduring foundational strengths such as domain expertise, problem-solving, critical thinking, and business acumen.

This is not an either-or proposition. Frontier AI skills and foundational skills reinforce each other. Together, they create the composite capabilities that enable organisations to move beyond AI adoption and towards AI-driven enterprise-wide value creation.

Realising this vision will, however, require coordinated action across the ecosystem. Policymakers must reimagine the talent supply architecture: from curriculum modernisation and faculty transformation to apprenticeship-at-scale models and deeper university-industry collaboration. GCCs, in turn, must elevate talent development from a discretionary spend to a strategic investment, build AI centres of excellence, accelerate enterprise-wide AI fluency, and cultivate a new generation of leaders capable of orchestrating human and machine intelligence at scale. Industry bodies must help bridge the last mile by creating sector-specific skill pathways, capability clusters, and shared standards that translate frontier technologies into domain-specific business value.

Above all, India will need a coordinated mechanism to align industry, academia, technology providers, and government around a shared skills agenda. In fact, a dedicated GCC Skills Council, or alternatively, a GCC-focused sub-vertical housed within an existing national skilling or industry framework could provide the institutional anchor needed to align talent pipelines with evolving industry requirements and sustain India's leadership in global capability delivery.

GCCs that succeed in developing AI-ready leaders, composite-skilled workforces, and resilient talent ecosystems will evolve from centres of execution into centres of influence, driving innovation, shaping enterprise strategy, and creating global competitive advantage. In doing so, they will not merely redefine the role of GCCs: They will help position India as the global epicentre of enterprise intelligence, innovation, and value creation.





01

Why GCCs matter to the future of India

From service provider to product nation

The next chapter of India's growth story will be defined by how innovatively India creates for the world. To realise its vision of *Viksit Bharat* by 2047, India must evolve from a preferred service provider to a product nation⁵—designing its own world-class products, creating intellectual property at home, manufacturing locally at scale, and competing globally on the strength of what it owns and innovates.

In doing so, India can establish itself as the world's nerve centre for enterprise intelligence. And as the institutions that elevated India to the world's leading services destination, GCCs are uniquely placed to lead this transformation.

The GCC phenomenon placed India in a distinctive orbit alongside Silicon Valley in the United States and the Kaizen model in Japan, acting as a value architecture that creates sustained domestic economic benefit while delivering global enterprise impact. Just as Silicon Valley established a self-reinforcing innovation cycle through ecosystem reinvestment, organisations are now doubling down on their India-based GCCs, recognising them as innovation engines to be fuelled.

This is not just an industry-led shift. The Government of India has articulated an equally forward-looking vision with Finance Minister Nirmala Sitharaman recently stating that India aspires to become a 'strategic leader' in the GCC arena and to become indispensable to the world's knowledge economy⁶ as the originator of products, platforms, and enterprise capabilities for the world.

⁵ The Hindu Businessline, India can become product nation of the world (accessed as of 28 July 2026)

⁶ The Economic Times, India wants to lead, not just host, GCCs: Nirmala Sitharaman (accessed as of 29 July 2026)





“ India’s value proposition has evolved from cost efficiency to capability leadership. Enterprises are now moving beyond minimising cost to maximising innovation, accelerating discovery and strengthening long-term competitiveness. And that, I believe, should define the ambition for the next decade. Not simply to host more GCCs, but to ensure that an increasing share of the world’s ideas, patents, products, algorithms, platforms, and enterprise capabilities are conceived, engineered, and led from India.”⁷

- Finance Minister Nirmala Sitharaman

As of FY26, over 2,100 GCCs in India employ around 2.36 million skilled professionals and generate USD98.4 billion in revenue.⁸ GCC exports as a proportion of India’s services exports increased from 19.7% in FY19 to 23.5% in FY26,⁹ which underscores the increasing criticality of their role in bolstering India’s services exports.

At a glance

#1

Global share of GCCs

USD **98.4** billion

In revenue

2,100+

Number of GCCs

2.36 million

Skilled professionals

⁷ The Times of India, Centre looks to tap more global giants for GCCs (accessed as of 27 July 2026); Nirmala Sitharaman’s address

⁸ Business Standard, India’s GCCs are increasingly leading the AI mandate for global enterprises, driving global value creation (accessed as of 27 July 2026)

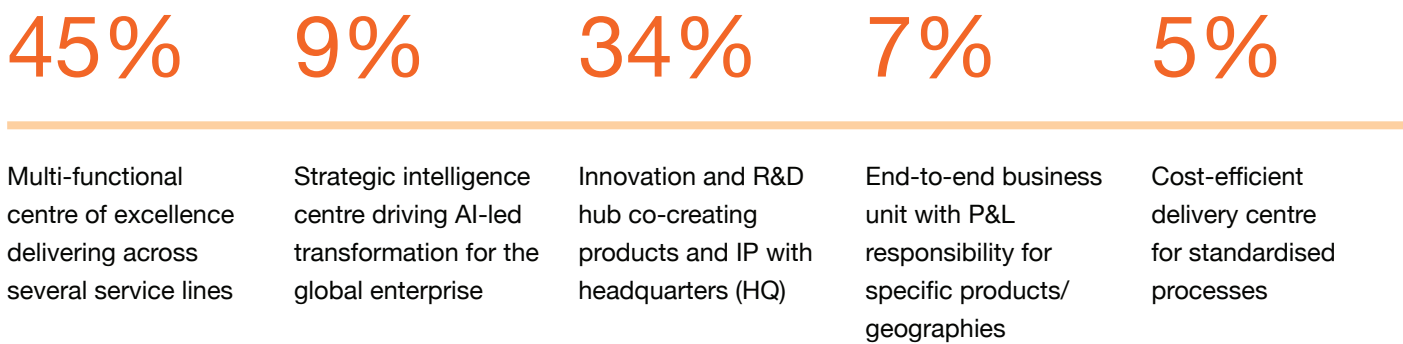
⁹ PwC India analysis



GCCs as a strategic asset in India's growth story

PwC India-FICCI's survey draws on the perspectives of 200 senior GCC decision-makers, including C-suite executives, business leaders, and GCC heads, spanning eight industries across India's leading GCC hubs. The respondent base is weighted towards mature GCC operations, with nearly two-thirds representing organisations employing more than 500 professionals. Within this group, 45% operate as multi-functional centres of excellence delivering capabilities across multiple service lines.

Figure 1: Current primary roles of GCCs in India



Source: PwC India analysis of survey data N=200

Today, 34% of GCCs function as innovation and R&D hubs, and one in five is targeting global P&L responsibility by 2030. GCCs are already building products of the AI era: intelligent systems and AI-native platforms that are anchoring India's product nation ambition.

India's digital public infrastructure has already demonstrated what is possible when deep domain expertise converges with cutting-edge technology and a relentless focus on scale, inclusion, and trust. DigiLocker serves 70 crore+ users holding over 900 crore documents.¹⁰ UMANG brings 2,585 government services to 11.8 crore+ citizens.¹¹ The Government e Marketplace (GeM) has facilitated public procurement worth INR18.4 lakh crore.¹² None of these platforms succeeded because of technology alone. They succeeded because India built composite capabilities—domain expertise in health, finance, and governance, fused with technology architecture in AI, cloud, and APIs, and anchored in accessibility, inclusion, and trust. In many ways, these platforms offer a blueprint for the future.

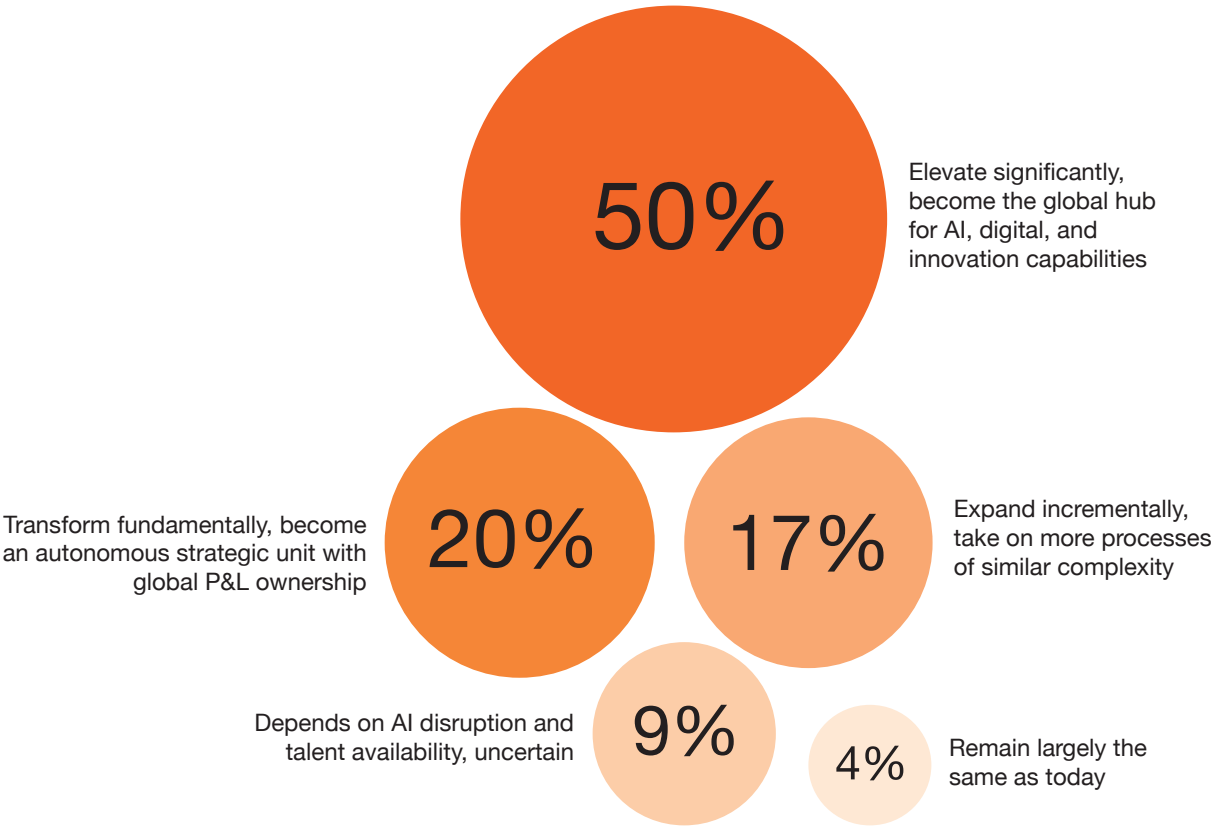
10 Government of India, DigiLocker website (accessed as of 29 July 2026)
11 Government of India, UMANG dashboard (accessed as of 29 July 2026)
12 PIB press release (accessed as of 27 July 2026)

The digital India blueprint for enterprise innovation

The opportunity before GCCs is to replicate this success at enterprise scale. If Digital India proved that the country could build products and platforms that serve a billion people, GCCs now have the potential to create the intelligent products, platforms, and business models that power global enterprises.

Encouragingly, GCC leaders are already embracing this mandate. In our survey, half of the respondents envisioned their GCCs becoming global hubs for AI, digital, and innovation capabilities by 2030. More than 85% expected an enhanced operating mandate spanning technology leadership, strategic ownership, and incremental capability expansion. Only 4% expected their role to remain largely the same as today. Business ownership and higher value global mandates are emerging as the next stage of GCC maturity, with one in five GCCs targeting global P&L responsibility.

Figure 2: Expected evolution of GCC roles by 2030



Source: PwC India analysis of survey data



The transition from service providers to creators of enterprise value is already visible in how GCC leaders define success. Increasingly, the ambition is not simply to execute global mandates, but to influence enterprise strategy, own business outcomes, and take end-to-end accountability for value creation across markets.

“Being autonomous, to my mind, is our ability to own business outcomes and solve problems end-to-end, leveraging technology without requiring continued validation from HQ. Autonomy need not be confined to a single GCC location—it can be a globally distributed capability, operating from different parts of the world while maintaining clear end-to-end accountability under a single leader. It is about moving beyond executing tasks and reporting performance to truly owning outcomes.”

- Vice President at the global service centre of a logistics company

This shift from execution to ownership is precisely why GCCs matter for India's future. As GCCs assume greater responsibility for product development, innovation, P&L accountability, and strategic decision-making, they become far more than engines of efficiency. They become institutions where intellectual property is created, future technologies are developed, and globally significant business decisions are shaped. In doing so, they strengthen India's position not merely as a destination for talent, but as a source of innovation, enterprise leadership, and economic value creation.

The question that remains, then, is whether GCCs can build composite skills fast enough to ensure that the intelligent products defining the next decade are designed and owned from India. If it can, GCCs may do for India's innovation economy what they once did for its services economy: become the foundation of the country's next era of growth, global leadership, and value creation.



The GCC journey in India: From support operations to AI-driven innovation

An overview

What began as an enterprise model focused on efficiency, process excellence, and service delivery is steadily transforming into a network of centres entrusted with innovation, product development, and strategic business outcomes.

“ We are far more than a service centre today: We are a centre of excellence. We’ve evolved to own end-to-end responsibilities: plan, build, run, all from India. The terminology hasn’t caught up yet, but our ground reality has changed.”

- Head of the global business service centre of a major auto-components maker

This evolution is unfolding in distinct ways across industries. For instance, our survey indicates that sectors such as healthcare (80%), life sciences (60%), and pharmaceuticals (57%) have largely matured into multi-functional centres of excellence spanning multiple business functions. In contrast, technology, media, and telecommunications (TMT) GCCs are charting a different course to advance their own strategic agenda. More than half (57%) of TMT GCCs now position themselves as innovation and R&D hubs, co-creating products and intellectual property alongside their global HQ. Together, these shifts signal a broader transition in the GCC model from supporting the enterprise to shaping its future.

Figure 3: Most GCCs operate as multi-functional centres of excellence

Primary roles	BFSI*	Energy and utilities	Manufacturing	Pharmaceuticals	Retail and consumer	TMT	Life sciences	Healthcare
Multi-functional centre of excellence delivering across several service lines	46%	53%	50%	57%	44%	31%	60%	80%
Innovation and R&D hub co-creating products and IP with HQ	16%	33%	23%	36%	26%	57%	40%	20%
End-to-end business unit with P&L responsibility for specific products/geographies	22%	7%	8%	0%	4%	2%	0%	0%
Strategic intelligence centre driving AI-led transformation for the global enterprise	16%	7%	4%	7%	7%	7%	0%	0%
Cost-efficient delivery centre for standardised processes	0%	0%	15%	0%	19%	3%	0%	0%

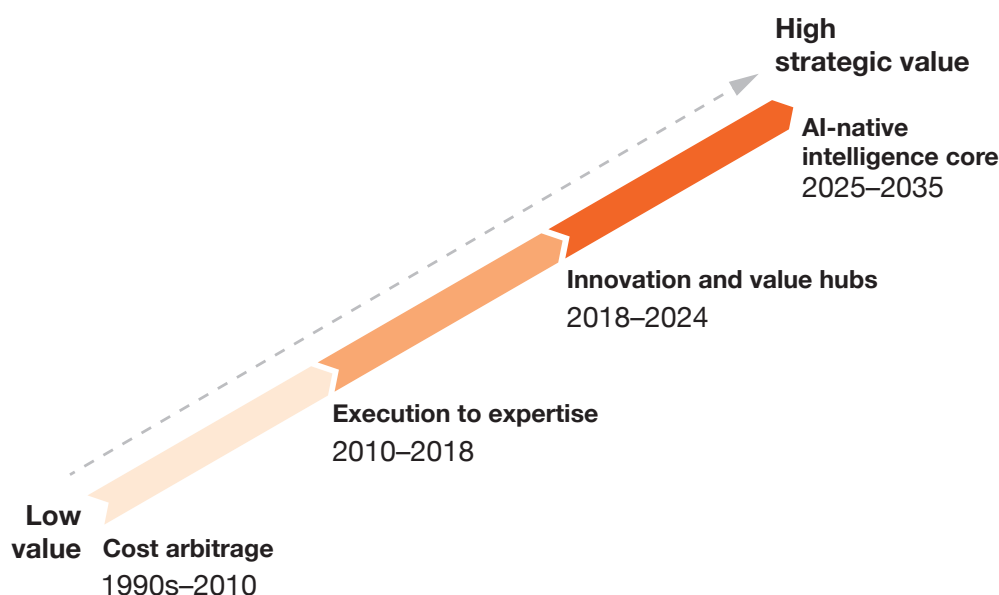
Source: PwC India analysis of survey data

*Banking, financial services, and insurance

From past perfect to present continuous

The growth of India's GCC ecosystem can be mapped to four distinct phases:

Figure 4: The four eras of India's GCC journey



Source: PwC India analysis of survey data

A) Cost arbitrage (1990s–2010)

The talent model was straightforward: Large pools of English-speaking graduates executed standardised tasks with rigour and efficiency. Success was measured in headcount, cost savings, and process adherence. India's value proposition was scale, reliability, and cost.

B) Execution to expertise (2010–2018)

The talent demand moved from volume to specialisation: data scientists, domain experts, Six Sigma practitioners, and engineers who could not just run processes but also improve them. GCCs became centres of excellence—owning functional depth and earning credibility as knowledge partners rather than execution centres.

C) Innovation and value creation hubs (2018–2024)

The most recent phase has seen GCCs redefine their identity and position themselves as innovation engines driving research and development (R&D), building proprietary platforms, filing patents, and incubating new business models. Between FY20–24, GCCs in India made significant progress in their roles as cost-effective innovators and multifunctional excellence hubs.¹³

¹³ PwC, Catalysing value creation in Indian global capability centres



D) AI-native intelligence core (2025–2035)

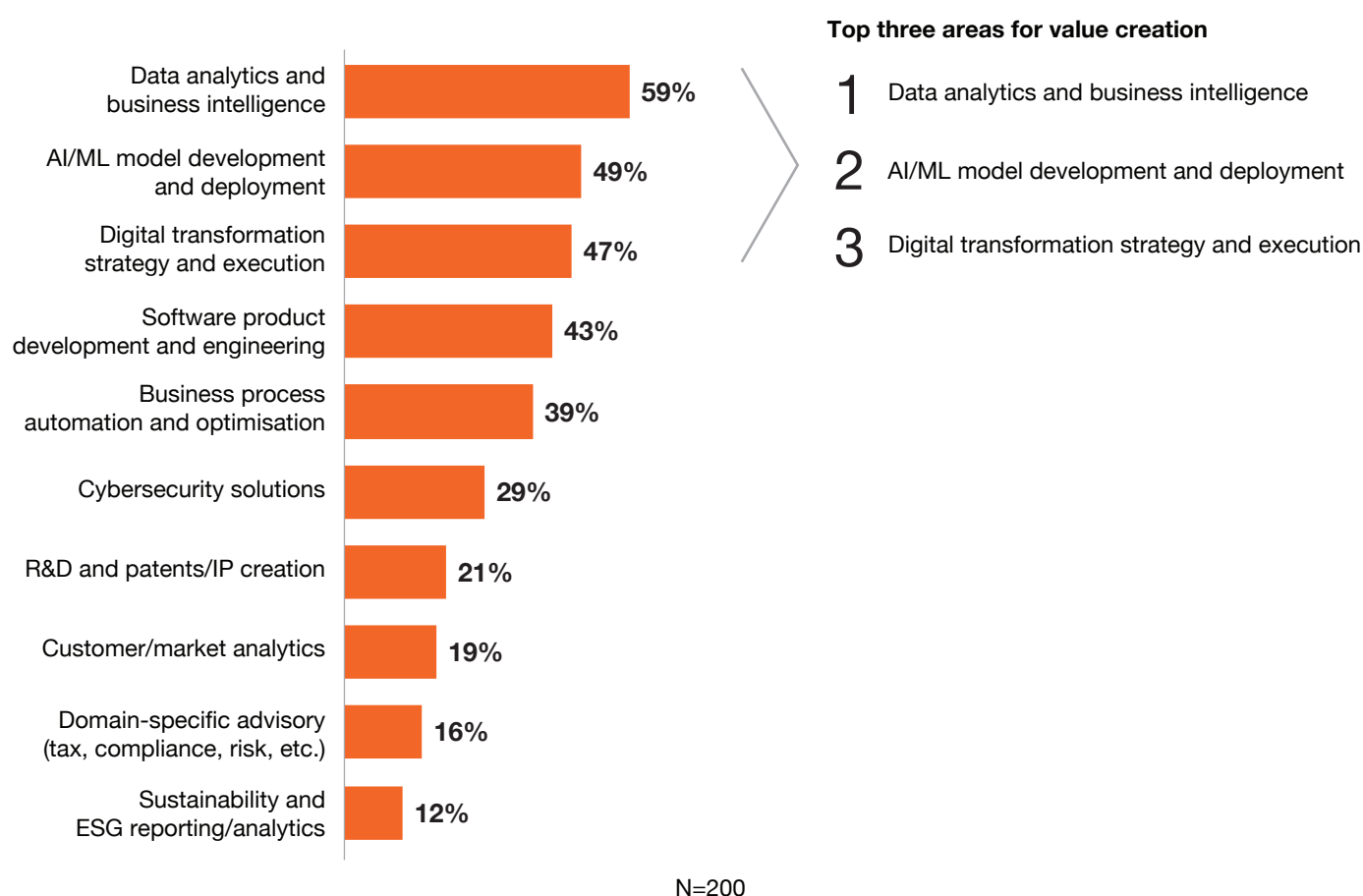
The GCC ecosystem has fundamentally reinvented itself over the past decade. Its role extends beyond supporting the enterprise to shaping its future.

Nearly 80% of GCCs now define themselves as either centres of excellence or innovation hubs, 7% carry end-to-end business or P&L responsibility, and only 5% continue to identify primarily as cost-delivery operations. Innovation has become a core GCC mandate, with 34% of centres functioning as innovation and R&D hubs focused on product development, intellectual property creation, and next-generation technology capabilities. At the same time, newer GCCs are increasingly being established as multi-functional centres of excellence, rising from 33% before 2000 to 47% after 2020.

What distinguishes this current phase is that value creation is increasingly being driven by intelligence rather than execution. Data analytics and business intelligence (59%) has emerged as the single largest source of enterprise value creation, followed by AI/ML model development and deployment (49%), and digital transformation strategy and execution (47%). While software engineering, process automation, and cybersecurity remain important, the centre of gravity is shifting towards capabilities that combine data, AI, domain expertise, and strategic decision-making.



Figure 5: Areas driving value creation for GCCs



Source: PwC India analysis of survey data

Note: Respondents could select more than one option.

As Figure 5 indicates, GCCs are becoming the intelligence layer that enables organisations to anticipate, optimise, and innovate at scale. Indeed, India-based GCCs are increasingly where AI capabilities are conceived, built, deployed, and scaled for global businesses. Their mandate is expanding from technology execution to business value creation, from supporting products to shaping them, and from delivering services to influencing enterprise outcomes.

The emergence of the AI-native intelligence core therefore marks a fundamental redefinition of the GCC proposition. In this phase, competitive advantage will accrue not to centres that merely possess technical capabilities, but to those that can combine AI, analytics, automation, and engineering with deep domain expertise and business context. As enterprise value creation becomes increasingly intelligence-driven, GCCs are uniquely positioned to evolve into the strategic nerve centres of global organisations—designing solutions, creating intellectual property, and driving decision-making in ways that directly shape growth, innovation, and competitiveness.



The future trajectory of GCCs

“ India has become the second largest base of enterprise AI talent in the world. The intellectual property created in these centres is real. The patents are filed here. The products are shipped from here. And global roles are increasingly held by Indians.”¹⁴

- Chief Economic Advisor V Anantha Nageswaran

This observation captures the future direction for India's GCC ecosystem. In this phase, the ability to combine human judgement, machine intelligence, and enterprise data to drive decision-making, innovation, and business outcomes at scale will increasingly determine competitive advantage. As discussed earlier, AI and data capabilities are rapidly becoming the defining pillars of the GCC value proposition.

This transition will fundamentally reshape talent architectures. Instead of a small cohort of AI specialists surrounded by traditional professionals, the workforce of the future will be defined by a talent architecture where AI literacy is the baseline, domain expertise is augmented by machine collaboration, and the ability to drive technology-led transformation is expected at every level.

GCCs, therefore, are increasingly demonstrating that AI's value goes far beyond automation; it lies in unlocking new forms of business impact, innovation, and strategic influence across the enterprise.

¹⁴ Moneycontrol, From back offices to AI hubs: India now hosts half of global GCCs, says CEA Nageswaran (accessed as of 27 July 2026); V Anantha Nageswaran's address





“ Our GCC is no longer about labour arbitrage; we are a strategic business partner. By leveraging the strength of India’s ecosystem—its talent, technology, and innovation capabilities, we solve enterprise-wide challenges and create value for the Group by improving business outcomes, driving efficiencies, and enabling innovation beyond traditional labour arbitrage. For instance, by embedding AI into a highly manual logistics process, we reduced transaction costs by 60% without displacing talent. This not only earned us greater strategic trust but also demonstrated to stakeholders at the HQ the scale of innovation and business impact that can be delivered from India.”

- Vice President at the global service centre of a logistics company

It is clear that the story of operational excellence is making way for one of enterprise influence, innovation ownership, and global leadership, cementing the status of GCCs as one of India’s most important engines of growth in the AI era.

Unravelling the talent and skills gaps: Present realities and future challenges

Advantage India

India is home to one of the world's largest STEM talent pools, accounting for 28% of the global STEM workforce and 23% of global software engineering talent.¹⁵ India also leads the world on the Stanford AI Skill Penetration Index with a score of 3.0, well ahead of the US (2.13).¹⁶ This underscores both the depth of the country's digital capabilities and its readiness to shape the next wave of AI-driven innovation.

These advantages augur well. As global enterprises re-evaluate where AI capabilities, talent, and innovation mandates should reside, India is increasingly emerging as the natural destination for building enterprise-scale AI capability.

“Because India has a strong talent pool, global head offices are likely to create AI talent pools within GCCs in India to support initiatives worldwide. Our GCC is seeing early signs of this.”

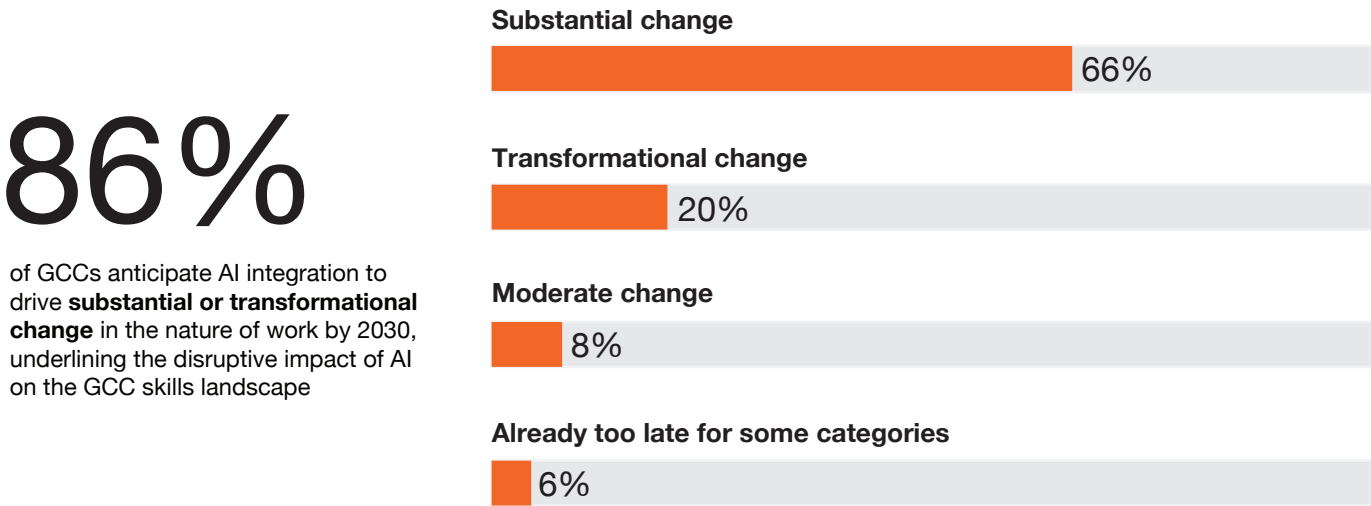
- Director and country manager at an India shared service centre of a financial solutions company

¹⁵ Economic Survey 2024-25

¹⁶ The Hindu Businessline, Indians most nervous about AI despite highest skill penetration (accessed as of 27 July 2026)

The implication is significant. According to our research, AI is expected to fundamentally reshape how work is performed across GCCs by 2030, with 86% of leaders anticipating substantial or transformational change in the nature of work. But this is not confined to incremental reskilling. It demands a complete reconfiguration of workforce architectures, with a decisive shift towards talent that combines frontier AI capabilities with deep domain expertise. Further, the reconfiguration creates an urgent need for a new generation of hybrid professionals.

Figure 6: GCC leaders bet big on AI



Source: PwC India analysis of survey data

Reinventing workforce architectures

The anticipated scale of change spanning sectors is striking: Across every industry surveyed, a majority of leaders expect a substantial or transformational reshaping of roles by 2030. Healthcare (80%), manufacturing (77%), and TMT (71%) anticipate the most significant workforce shifts, while sectors such as pharmaceuticals and retail and consumer expect not only widespread reskilling but also a fundamental redesign of job architectures. In some industries, leaders already believe that parts of the current skills base risk becoming obsolete, reinforcing the urgency of workforce reinvention.

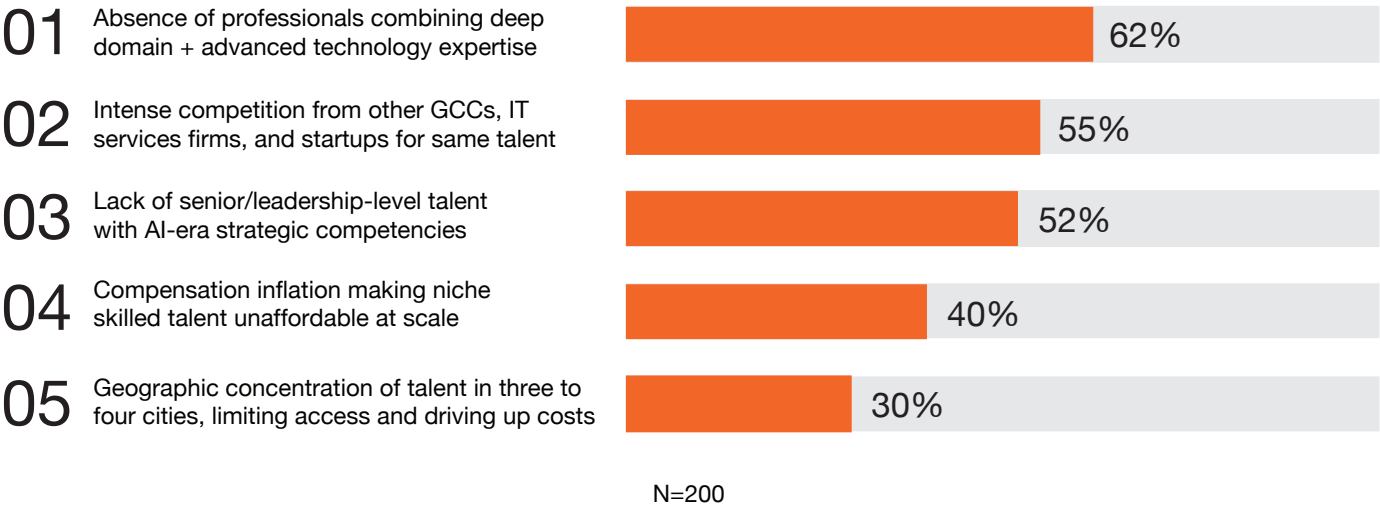
Figure 7: AI set to redefine nature of work

Extent of change	BFSI	Energy and utilities	Manufacturing	Pharmaceuticals	Retail and consumer	TMT	Life sciences	Healthcare
Substantial change: A significant proportion of roles require fundamentally new skills	66%	60%	77%	64%	44%	71%	60%	80%
Transformational change: A majority of roles will be redefined or eliminated, requiring an entirely new skills architecture	26%	7%	8%	36%	33%	12%	20%	20%
Moderate change: Many roles evolve but the core workforce profile remains similar	6%	13%	15%	0%	7%	9%	0%	0%
Already too late for some categories: Certain skill areas are already obsolete	2%	20%	0%	0%	4%	8%	20%	0%
Marginal change: Existing skills remain largely sufficient with minor augmentation	0%	0%	0%	0%	12%	0%	0%	0%

Source: PwC India analysis of survey data

Regardless of sector, the supply-side challenge remains consistent and acute. As Figure 8 indicates, the single biggest constraint facing GCCs today, as cited by 62% of leaders, is the absence of professionals who combine deep domain expertise with advanced technology capabilities. This is followed by intense competition from other GCCs, IT services firms, and startups chasing the same scarce talent pool (55%), and a critical deficit of senior leadership talent with AI-era strategic competencies (52%).

Figure 8: Top five supply-side constraints



Source: PwC India analysis of survey data
Note: Respondents could select more than one option.

This supply-side challenge is multi-layered and self-perpetuating. Acquiring AI-ready talent is becoming increasingly difficult, driven by scarce specialised capabilities, leadership gaps, and intense market competition. The hybrid, senior, AI-fluent talent with domain expertise that India's GCC ecosystem needs most is hardest to find, most expensive to acquire, and most fiercely competed for across the market.

It is clear that GCC leaders are not placing all their bets on frontier technologies such as AI/ML engineering, agentic AI, AI governance, generative AI, advanced cybersecurity and MLOps. The true source of advantage lies in composite capabilities—the combination of human-led, domain-driven, and technology-enabled skills. Domain knowledge (sector), problem-solving, digital fluency, communication, and stakeholder management are becoming just as critical as technical proficiency. These are areas where the composite gap score is the highest (see Figure 9). So, in today's AI era, the winners will not be those with the most advanced algorithms, but those that are best able to fuse frontier technologies with deep business context and human judgement to create enterprise value at scale.

Figure 9: Importance of foundational skills in the AI era

Foundational skills	Current demand intensity	Expected demand intensity by 2030	Supply readiness	Criticality to GCC mandate	Composite gap score
Domain knowledge (sector)	4.53	4.66	2.81	4.69	4.13
Problem solving/analytical reasoning/structured thinking	4.62	4.63	3.50	4.62	4.00
Digital fluency	4.53	4.78	4.03	4.40	3.87
Communication/stakeholder management	4.17	4.58	3.38	4.42	3.83
Cybersecurity awareness	3.82	4.38	3.10	4.22	3.68
Software engineering fundamentals	4.14	4.05	3.83	3.96	3.48
Data literacy and analytics	4.32	3.90	3.88	3.74	3.44
Project/Agile management	3.96	3.94	3.64	3.86	3.41
Financial and commercial acumen	3.26	3.78	3.16	3.63	3.21
Business process expertise	3.36	3.26	3.71	3.11	2.87

Source: PwC India analysis of survey data

High
N=200

The subsequent heat map indicates that the frontier skills GCC leaders need most are related to building, governing, scaling, and securing AI rather than its use or adoption. In that sense, the frontier skills gap is also a value creation gap. The highest composite gap scores are concentrated in frontier capabilities that sit at the heart of AI-native enterprise transformation—domain-specific AI, AI/ML engineering, GenAI and LLM, and advanced data engineering. These skills have a high demand intensity and low supply readiness, but their relevance to the GCC mandate is critical. Unless these capabilities are built, they risk slowing the transition of GCCs from capability centres to AI-native intelligence cores.

Figure 10: Importance of frontier skills in the AI era

Frontier skills	Current demand intensity	Expected demand intensity by 2030	Supply readiness	Criticality to GCC mandate	Composite gap score
Domain-specific AI	4.11	4.59	2.35	4.44	4.03
AI/ML engineering	4.11	4.67	3.13	4.60	3.93
GenAI and LLM	3.80	4.54	2.56	4.37	3.86
Advanced data engineering	4.12	4.54	3.22	4.46	3.85
Advanced cybersecurity	3.78	4.47	2.88	4.40	3.78
MLOps/AIOps	3.84	4.43	2.92	4.40	3.78
AI governance/safety	3.58	4.38	2.55	4.35	3.75
AI product management	3.68	4.36	2.70	4.24	3.72
Cloud-native platform	4.16	4.32	3.71	4.26	3.65
Agentic AI	3.10	4.20	2.19	3.94	3.54
Digital twin/IoT	2.87	3.28	2.73	3.01	2.90
Sustainability/ESG	2.72	3.20	2.85	3.03	2.81

Source: PwC India analysis of survey data

High
N=200

The findings imply that GCCs are entering a more demanding phase of capability building. The demand is strongest for talent that can develop AI models, engineer the data foundations behind them, govern their risks, secure their deployment, and convert them into products and platforms that deliver measurable enterprise outcomes. This signals that the future GCC workforce will need to be composite by design—AI-fluent, domain-deep, commercially aware, and execution-ready.

Figure 11: Top 10 composite skills in demand

Category	Top ten skills with a composite skills gap score	Current demand intensity	Expected demand intensity by 2030	Supply readiness	Criticality to GCC mandate	Composite gap score
Foundational	Domain knowledge (sector)	4.53	4.66	2.81	4.69	4.13
Frontier	Domain-specific AI	4.11	4.59	2.35	4.44	4.03
Foundational	Problem solving/ analytical reasoning/ structured thinking	4.62	4.63	3.50	4.62	4.00
Frontier	AI/ML engineering	4.11	4.67	3.13	4.60	3.93
Foundational	Digital fluency	4.53	4.78	4.03	4.40	3.87
Frontier	GenAI and LLM	3.80	4.54	2.56	4.37	3.86
Frontier	Advanced data engineering	4.12	4.54	3.22	4.46	3.85
Foundational	Communication/ stakeholder management	4.17	4.58	3.38	4.42	3.83
Frontier	Advanced cybersecurity	3.78	4.47	2.88	4.40	3.78
Frontier	MLOps/AIOps	3.84	4.43	2.92	4.40	3.78

Source: PwC India analysis of survey data

High
N=200

The winners will be those that move fastest to bridge the composite gap and build an integrated skills stack that brings together human judgement, deep domain expertise, and advanced technological capabilities to create differentiated enterprise value.



Opportunities waiting to be tapped

The opportunities embedded within these challenges are substantial. As AI and automation reshape current roles by 2030, GCCs have a unique chance to fundamentally reimagine how talent is developed, deployed, and scaled. According to our survey, nearly one in two professionals—that is, on average, 46% of the workforce—will require significant upskilling or reskilling over the next three years. Alongside, the average 8.69-month journey from hiring to productivity highlights the significant value that could be generated through more targeted, sector-specific, and outcome-oriented skilling models. Organisations that can accelerate the closure of skills gaps will be best positioned to build a durable advantage in the race for AI-led growth and innovation.

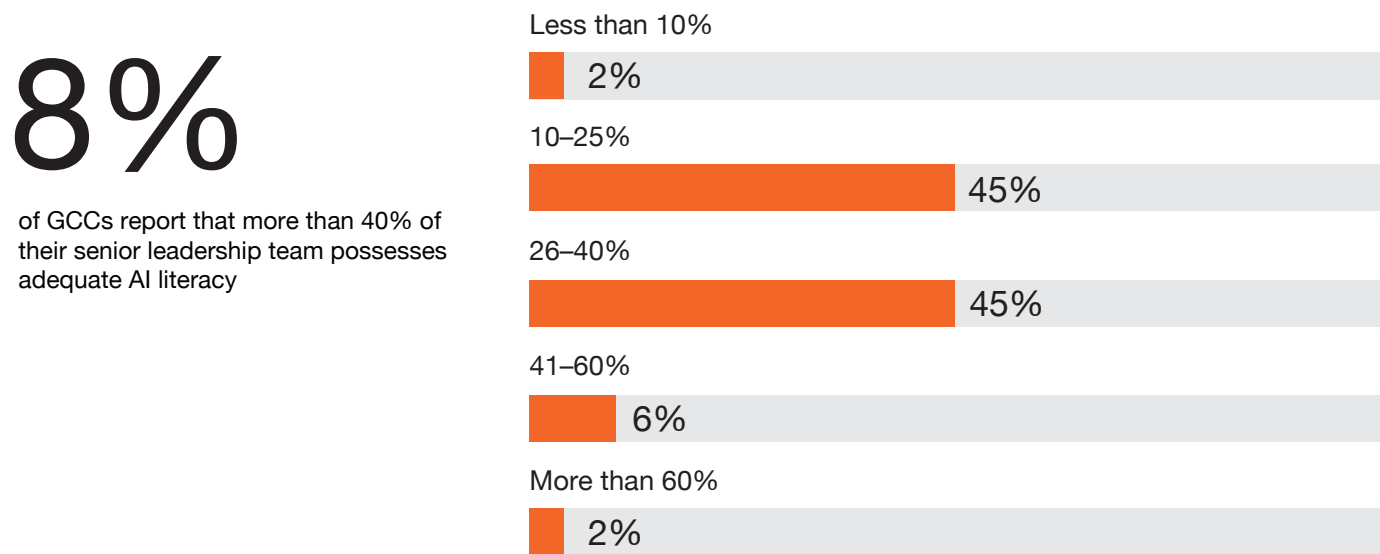
“ The talent we need is not deployment-ready on day one. We deliberately invest in building domain understanding, customer proximity, and enterprise context to shape our talent into long-term value creators. Given that the GCC model is built on continuous contribution rather than bench strength, reducing time-to-productivity is a critical value lever.”

- Head of the global business service centre of a major auto-components maker



The leadership challenge is as complex as the workforce challenge. AI ambitions are rapidly outpacing leadership readiness, with average AI literacy among senior leaders estimated to be at just 27%. Additionally, over 90% of the GCCs we surveyed report that only 40% of their leadership teams possess sufficient AI literacy to support strategic decision-making, while only 8% indicate that over 40% of their senior leaders are adequately AI-ready.

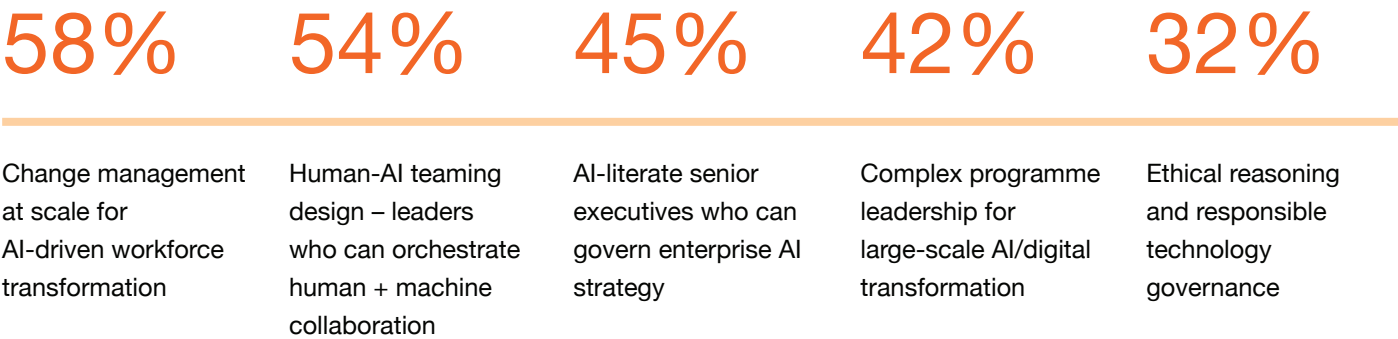
Figure 12: AI literacy readiness among senior leaders



Source: PwC India analysis of survey data

The gaps extend beyond technical understanding. Change management at scale for AI-driven workforce transformation emerges as the single largest leadership capability deficit (58%), followed by the ability to design effective human–AI teaming models (54%) and govern enterprise-wide AI strategy (45%). GCCs also face shortages of leaders equipped to drive large-scale digital transformation (42%) and ensure responsible AI governance (32%).

Figure 13: Top five leadership and strategic skill gaps



Source: PwC India analysis of survey data N=200

Note: Respondents could select more than one option.

GCCs therefore need to build an AI-ready leadership cadre capable of governing AI, orchestrating human and machine collaboration, and leading transformation at enterprise scale. This leadership layer is imperative in the journey from AI experimentation to sustained AI-driven value creation.

Leadership AI literacy matters even more because top skill priorities align closely with sector transformation agendas, reflecting distinct AI and domain-specific capability requirements. BFSI and TMT sectors prioritise AI-driven innovation, while manufacturing and energy focus on operational transformation through digital engineering. Further, healthcare and life sciences prioritise AI-enabled clinical evidence and regulatory capabilities, while retail and consumer focuses on intelligent forecasting and AI-driven personalisation, entailing investments in operational intelligence and automation. Without sector leadership that understands these distinct agendas, even the right skills in the right workforce will lack strategic direction.

Figure 14: Key skills challenges



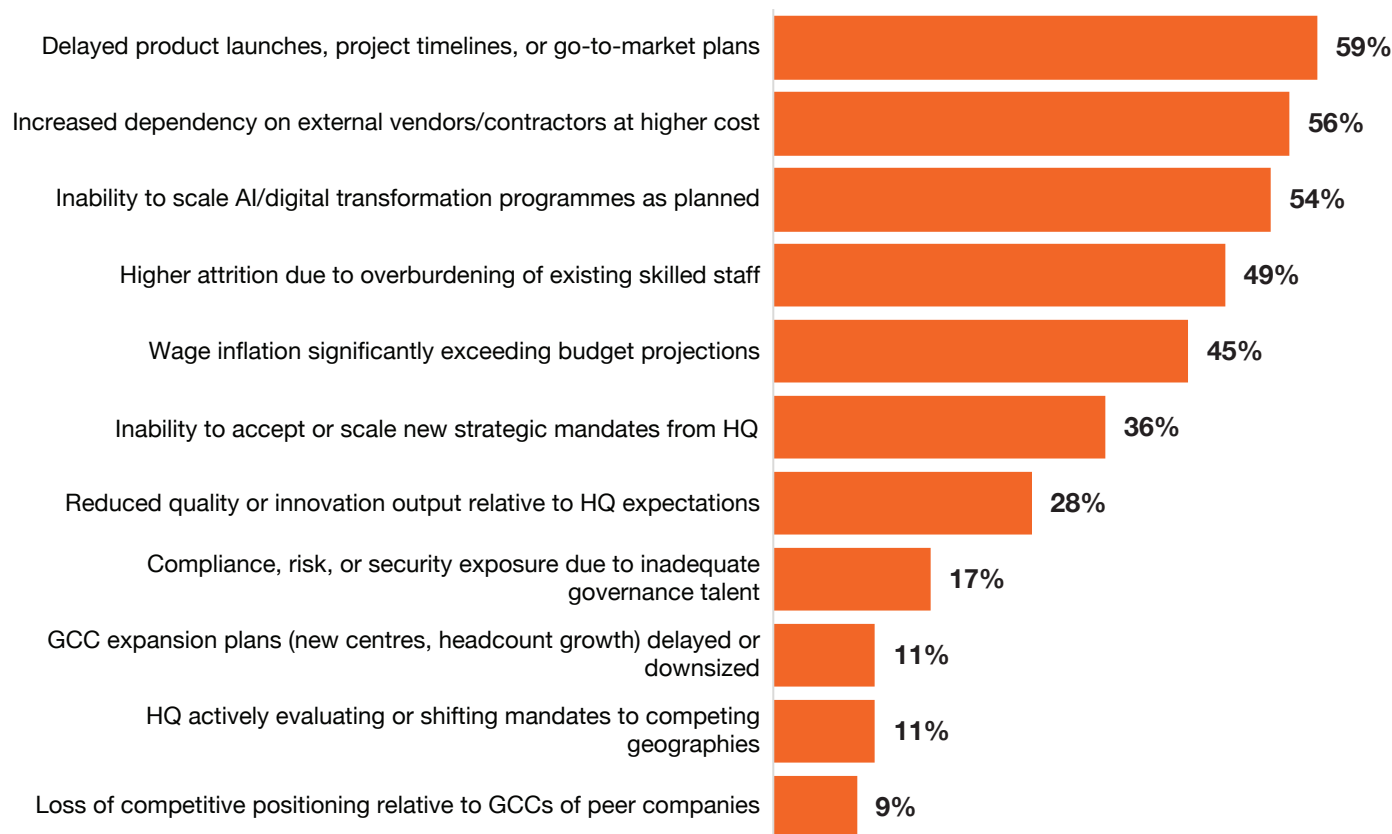
Source: PwC India analysis of survey data

Note: Respondents could select more than one option.

Value at stake

The consequences of skills gaps are already being felt across the ecosystem. Our research revealed the specific business consequences GCCs have experienced due to talent and skills gaps in the past 24 months. Nearly six in ten (59%) GCCs cite delays in product launches and project delivery as the primary consequence of talent gaps. More than half (54%) of GCCs indicate that talent gaps are constraining AI programme scaling and digital transformation efforts.

Figure 15: Business consequences due to skills gaps



Source: PwC India analysis of survey data

Note: Respondents could select more than one option.

Unresolved talent gaps don't just slow delivery, they may put the GCC's mandate itself at risk. 11% of GCC leaders say their HQ are actively evaluating or shifting mandates to competing geographies, a concern that is mirrored at the highest levels of economic policy. This suggests that the race for talent is a matter of strategic competitiveness. India's leadership in the global GCC landscape cannot be taken for granted, particularly as other countries actively strengthen their own talent ecosystems and compete for the same high-value opportunities.

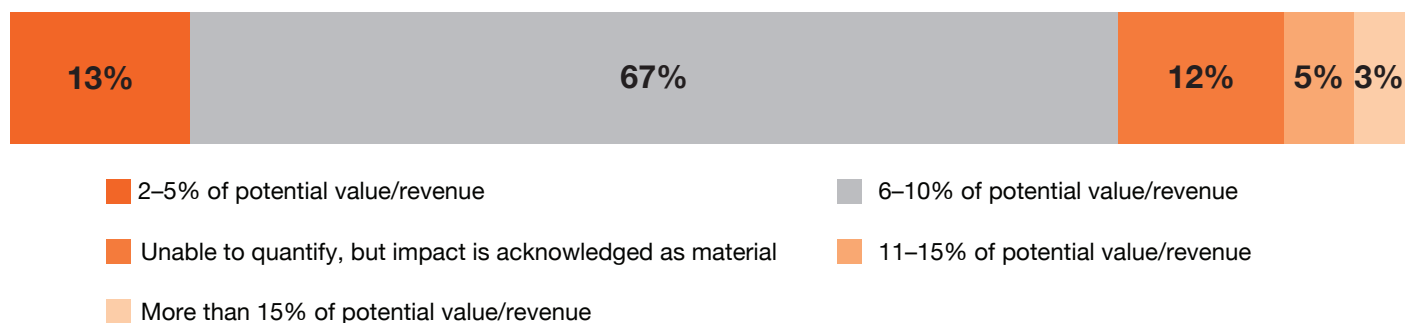
“Other countries are watching us and copying us. Our costs are rising. In some skills, our talent is already scarce. So, indispensability is not a title we can hold forever. It is a position we have to earn, and keep earning again and again.”¹⁷

- Chief Economic Advisor V Anantha Nageswaran

This is a powerful reminder that the country's future advantage will be determined by its ability to continually sharpen its talent edge. As GCCs move towards AI-native innovation, product ownership, and enterprise leadership, maintaining India's position as the destination of choice for global mandates will require sustained investment in skills, leadership capabilities, and workforce readiness.

GCCs themselves estimate that talent gaps have already impacted their value creation by up to 10%. Our research reveals that today, GCCs have the potential to generate an additional 7.83% of value or revenue annually¹⁸ by addressing critical skill gaps, a figure that could expand to 19.32% of total sector value or revenue by 2030.

Figure 16: Revenue or value creation impact of unfilled or under-skilled roles on GCC performance



Source: PwC India analysis of survey data

¹⁷ The Indian Express, Indian GCCs' costs rising, other countries copying us, cautions CEA Nageswaran (accessed as of 27 July 2026); V Anantha Nageswaran's address

¹⁸ The figures were calculated using a weighted midpoint approach. For current impact, the response bands 2–5%, 6–10%, 11–15%, and >15% were assigned midpoint values of 3.5%, 8.0%, 13.0%, and 15.0% respectively. For future projections, the bands 5–10%, 11–20%, 21–30%, and >30% were assigned midpoint values of 7.5%, 15.5%, 25.5%, and 30.0%. The weighted average was then calculated as $\sum (\text{response count} \times \text{midpoint}) / \text{total numeric responses}$, with non-numeric responses excluded.

The window to act is fast closing. Eight in ten GCCs acknowledge that they require decisive action to close skill gaps within 12 months.

Figure 17: Urgency to take action to bridge the skills gap

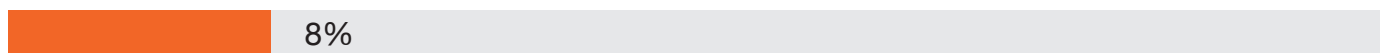
Immediate (~6 months)



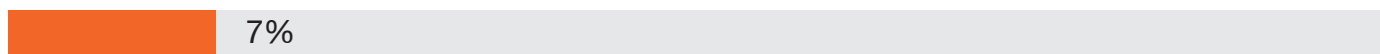
Short term (~12 months)



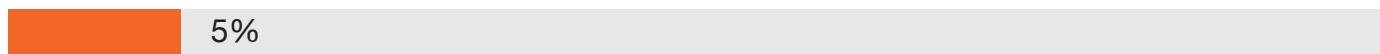
Already too late for critical frontier skills



Not urgent (3–5 years horizon)



Medium term (within 2–3 years)



N=200

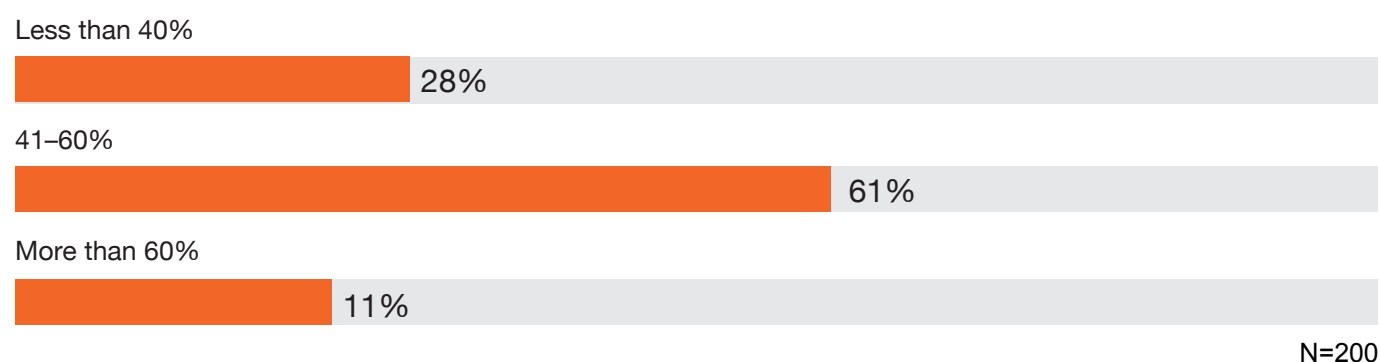
Industry-specific insights								
Window to act	BFSI	Energy and utilities	Manufacturing	Pharmaceuticals	Retail and consumer	TMT	Life sciences	Healthcare
Already too late	14%	13%	0%	7%	4%	5%	40%	0%
Immediate (~6 months)	40%	60%	23%	29%	48%	48%	0%	20%
Short term (~12 months)	34%	27%	54%	50%	33%	38%	40%	60%
Medium term (2–3 years)	6%	0%	11%	0%	0%	7%	20%	0%
Not urgent (3–5 years)	6%	0%	12%	14%	15%	2%	0%	20%

Source: PwC India analysis of survey data

At least 72% of GCCs across sectors and sizes must reskill or upskill over 40% of their workforce. In fact, 11% of leaders believe that their GCCs need extensive upskilling of over 60% of their employees. As Figure 18 shows, some sectors face steep reskilling curves.

Regulated, knowledge-intensive sectors lead the upskilling demand—energy (87%), life sciences (80%), and healthcare (80%)—for around half of their workforce, warranting priority investment. Even the lowest-need sectors (BFSI, TMT, manufacturing) sit near 50%, making reskilling/upskilling a universal, cross-sectoral requirement.

Figure 18: Distribution of reskilling/upskilling needs



Industry-specific reskilling/upskilling requirements								
% Workforce	BFSI	Energy and utilities	Manufacturing	Pharmaceuticals	Retail and consumer	TMT	Life sciences	Healthcare
Less than 40%	20%	13%	46%	14%	22%	39%	20%	0%
41–60%	58%	87%	50%	79%	67%	52%	80%	80%
More than 60%	22%	0%	4%	7%	11%	9%	0%	20%

Source: PwC India analysis of survey data

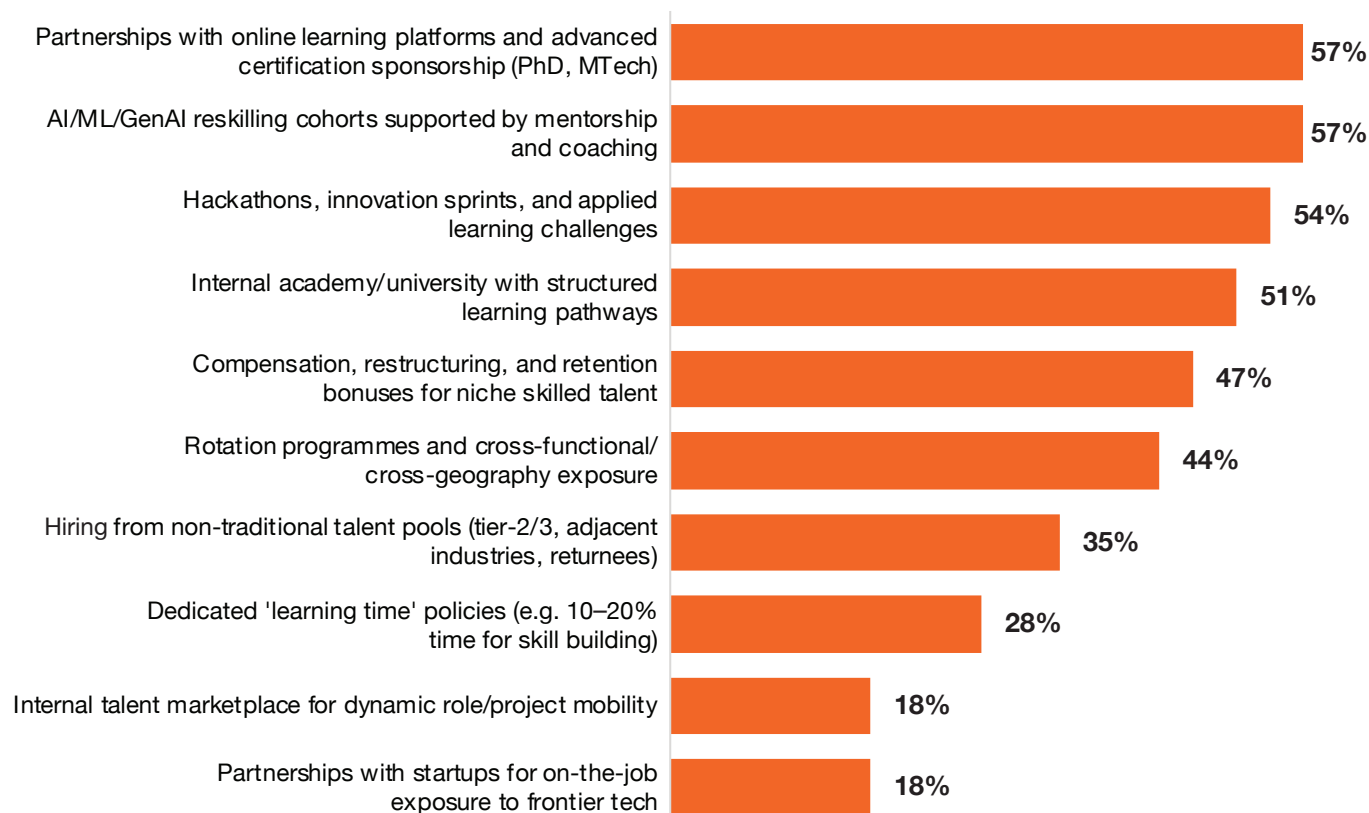
Workforce transformation is therefore an enterprise-wide imperative. While the scale of reskilling required is unprecedented, so is the opportunity it creates. In the AI era, the competitive advantage of GCCs will be determined by how quickly and effectively they can reinvent the capabilities of their talent to tap new sources of innovation, secure higher-value mandates, and accelerate their journey from capability centres to strategic value creators.

The response landscape: Current interventions and initiatives

Learn + apply

GCCs are already in action mode. Across the ecosystem, organisations are moving beyond traditional training approaches and building more immersive 'learn + apply' models to accelerate capability development at scale.

Figure 19: Internal interventions by GCCs



Source: PwC India analysis of survey data

Note: Respondents could select more than one option.



Partnerships with online learning platforms and AI/ML reskilling cohorts (both 57%) have emerged as the most widely adopted interventions, closely followed by hackathons (54%), reflecting a growing emphasis on experiential, role-based learning. Increasingly, the focus is shifting from delivering training to creating measurable workforce outcomes—identifying emerging skills, redeploying talent, and embedding AI fluency across the organisation.

To further scale AI capabilities, GCCs are also increasingly turning to a broader ecosystem of industry bodies, consulting firms, technology platforms, and academic institutions. A majority of GCCs (64%) trust tie-ups with technology giants and elite academic institutions to deliver effective AI skilling.

However, successful industry–academia partnerships require sustained commitment, coordination, and prioritisation from both sides.

“Meaningful collaboration takes persistence. Industry isn’t always familiar with how the academic credit system works, and neither side has the luxury of time. But when engagement is sustained through planning, regular interactions, and consistent follow-up, the partnership delivers results. Ultimately, it succeeds when both sides make it a priority.”

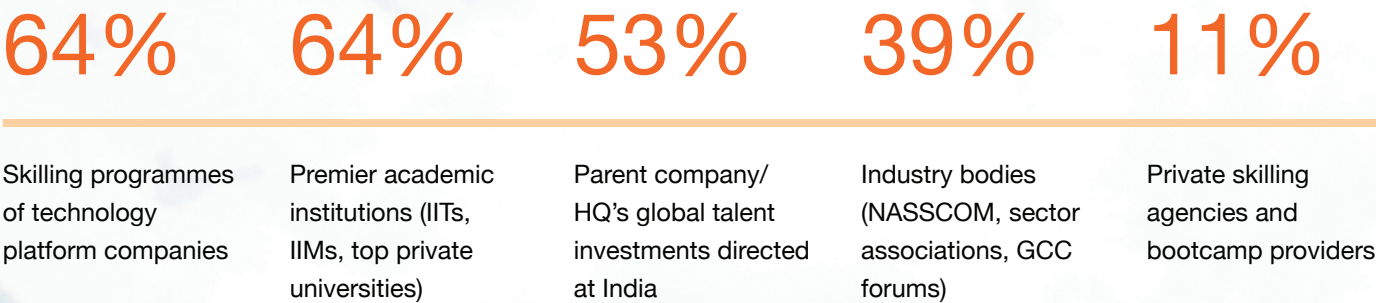
- Senior government consultant working in the academic and skills space

Effective collaboration therefore entails sustained engagement. When industry and academia invest the time to align expectations, maintain dialogue, and co-create outcomes, partnerships can become a powerful catalyst for building future-ready talent at scale.



External collaborations, however, represent only one side of the skilling equation. More than half of the GCCs surveyed view talent investments made by their global headquarters in India as effective. This underscores the critical role of company-led skilling initiatives—such as in-house academies and global mobility programmes—in building AI-ready talent at scale.

Figure 20: External interventions to address a GCC's talent needs



Source: PwC India analysis of survey data

N=200

Note: Respondents could select more than one option.



Building AI talent in-house

Some GCCs, on the other hand, advocate a 'build vs buy' model for AI talent. Rather than competing in an increasingly crowded market for scarce and expensive AI specialists, they are investing in long-term partnerships with academia, early-career engagement programmes, and structured capability-building pathways to create their own AI talent pipelines. For these organisations, the objective is not simply to acquire talent but to systematically develop it by combining technical expertise with enterprise context and domain knowledge from the outset.

This philosophy is reflected in the approach adopted by several leading GCCs.

“GCCs should partner with universities or institutions to build a steady AI talent pipeline. This could involve internships and early engagement, allowing companies to train talent before they fully enter the workforce. We prefer developing AI capabilities internally, taking people with limited experience and training them into AI professionals rather than relying only on people who already position themselves as AI experts.”

- Director and country manager at the India shared service centre of a financial solutions company

This approach reflects a fundamental reality of the AI era: Sustainable competitive advantage will be built not by competing for a finite pool of experts, but by creating proprietary talent ecosystems capable of continuously generating the composite capabilities that future GCC mandates demand.





The policy imperative

For India's AI skilling ambitions to gain momentum, policy and GCC talent demand must advance together. The foundations are already being laid. Government frameworks such as the National Programme on AI Skilling Framework¹⁹ are ensuring consistency and quality in AI talent supply, simplifying GCC hiring and onboarding. Further, digital public infrastructure such as the Skill India Digital Hub (SIDH)²⁰ offers single-window access to a large, verified pool of digitally skilled candidates.

The Government's push to extend the GCC footprint beyond major metros into tier-2 and tier-3 cities is opening new talent reservoirs, enabling enterprises to tap emerging centres of excellence while fostering more inclusive and distributed growth. Programmes such as the Craftsmen Training Scheme (CTS)²¹ are further broadening the pipeline by building capabilities in AI, robotics, and other frontier technologies beyond the country's premier institutions.

“The government has been listening. This year's budget took a very clear step on tax certainty for these centres (GCCs). Transfer pricing and safe harbour rules have been simplified and widened...We have also launched a national framework to carry these centres beyond the six large cities into tier-2 and tier-3 towns across the country.”²²

- Chief Economic Advisor V Anantha Nageswaran

Sustaining India's GCC leadership will increasingly depend on a strong partnership between government, industry, and academia. Several Indian states are also building a future-ready talent pipeline and full-stack skilling ecosystem, embedding AI literacy in schools, upskilling professionals at scale, and creating deep-tech innovation hubs where startups, academia, and industry converge. Major GCC hubs such as Karnataka, Telangana, Tamil Nadu, Maharashtra, and Delhi have each developed state-level strategies to attract and retain GCCs, with skilling and talent development increasingly central to these propositions.

Karnataka's GCC Policy 2024–29, for instance, spans the entire journey from curriculum design through its AI Skilling Council to job-ready professionals via the Nipuna Karnataka programme.²³ Similarly, Telangana's AI Academy reportedly aims to train around 5 million students, professionals, and government personnel and nurture 250 startups over three years.²⁴

19 National Programme on Artificial Intelligence (NPAI) Skilling Framework (accessed as of 27 July 2026)

20 Government of India, SkillIndia (accessed as of 27 July 2026)

21 PIB press release (accessed as of 28 July 2026)

22 The Economic Times, Govt has done its part on GCCs via Budget, now industry must invest in skilling and innovation to counter AI risks: CEA Nageswaran (accessed as of 28 July 2026); V Anantha Nageswaran's address

23 Government of Karnataka, Nipuna Karnataka initiative (accessed as of 29 July 2026)

24 The Times of India, Telangana rolls out ambitious AI roadmap to emerge as global hub (accessed as of 27 July 2026)





Meanwhile, Delhi's AI Grind initiative²⁵ is engaging 5 lakh students in building real-world AI prototypes, and Tamil Nadu, Telangana, and Delhi have all begun weaving AI, coding, and robotics into school curricula, embedding practical AI application from an early stage.^{26,27, 28}

It is important to note that national initiatives, state-level ecosystems, GCC-led academies, and technology platform certifications can no longer operate in silos. To meet the demands of the AI era, these programmes must converge around a shared talent transformation agenda. Only through coordinated action can India build the depth, scale, and speed of capability development required to move from being a consumer of talent to a co-creator of it.

It is against this backdrop that Finance Minister Nirmala Sitharaman's five-point strategy to expand India's GCC ecosystem to 5,000 by 2030 assumes particular significance. It is a blueprint for the next generation of AI-powered GCCs.

“First, companies should move up the value chain by creating intellectual property, leading frontier research, developing AI applications, owning product architecture, and driving global innovation. Second, they should deepen engagement with universities and startups to ensure seamless movement of innovation from laboratories to markets. Third, the GCC ecosystem should expand into tier-2 and tier-3 cities, which are emerging as talent and infrastructure hubs. Fourth, industry should work closely with state governments, local administrations, and communities to prepare them for the next wave of GCC investments. Finally, it should strengthen partnerships with governments with regular feedback on policy, processes, talent, and infrastructure.”²⁹

- Finance Minister Nirmala Sitharaman

Taken together, these priorities point to a larger truth: The countries that lead the AI era will be those that build talent ecosystems at scale, and India's evolving policy framework is positioning it to do precisely that. The task now is execution: Bringing government, industry, academia, and technology partners together to create a self-reinforcing engine of skills, innovation, and value creation.

²⁵ Delhi AI Grind Innovation (accessed as of 29 July 2026)

²⁶ India Today, Tamil Nadu introduces pilot programme in AI, robotics, and digital tools for govt. schools (accessed as of 28 July 2026)

²⁷ The New Indian Express, AI education in state-run schools (accessed as of 29 July 2026)

²⁸ The New Indian Express, 75 CM Shri Schools with AI tools inaugurated in Delhi (accessed as of 28 July 2026)

²⁹ The Economic Times, Sitharaman urges India to move beyond GCC hub status, target 5,000 centres by 2030 (accessed as of 29 July 2026); Nirmala Sitharaman's address



The action framework: Bridging the skills gap for the present and future

Unlocking opportunities

“ The Government can build the runway, but it cannot fly the plane. The move from cost to capability, from execution to innovation, has to be made by firms and by people. Skilling is the clearest case. We produce a very large number of graduates each year. We do not yet produce enough of those who are ready on day one... Closing that gap needs universities, industry, and the government working together. Not one after the other, but at the same time.”³⁰

- Chief Economic Advisor V Anantha Nageswaran

For India to be positioned as one of the principal architects of the AI-powered global economy, ecosystem-wide collaboration must accelerate significantly. The heat maps discussed in Chapter 3 (Figures 9, 10, 11) reveal that more than a generic skills shortage, India's GCC ecosystem is facing a value creation opportunity. If left unaddressed, current capability gaps could put as much as 19.32% of future value at stake over the next four years.

GCC leaders undoubtedly have a clear understanding of where demand is headed. Foundational capabilities such as domain expertise, digital fluency, analytical thinking, and communication remain indispensable. At the same time, frontier skills have moved from the periphery to the core of enterprise value creation. Combining these skills with foundational skills is now more important than ever.

Moreover, the challenge is no longer whether GCCs can become strategic, as they already are. The question is whether the ecosystem can build frontier, hybrid, and leadership capabilities at the speed and scale the AI era demands. Success will require more than

³⁰ The Economic Times, Govt has done its part on GCCs via Budget, now industry must invest in skilling and innovation to counter AI risks: CEA Nageswaran (accessed as of 27 July 2026); V Anantha Nageswaran's address



hiring. It demands the simultaneous reskilling of the existing workforce, faster conversion of available talent into enterprise-ready capability, stronger industry-academia partnerships, and deeper investment in leadership development. Most importantly, it requires a coordinated ecosystem effort in which GCCs, universities, technology partners, skilling providers, and policymakers work towards a common objective.

Certain government-affiliated academic institutes are already emerging as important talent partners for the industry, offering affordable, industry-aligned programmes that combine real-world business case studies, AI-enabled learning tools, micro-credentials, and stackable certifications. With courses priced between INR200 and INR20,000 and many offered free or at nominal cost for disadvantaged groups, their digital platforms have the potential to serve as powerful engines for making talent industry-ready at scale, reaching learners in every corner of the country.

These institutes are in the process of expanding their portfolio of emerging and industry-relevant programmes. Their dedicated placement cells, strong industry linkages, and growing alumni engagement support apprenticeships and employment opportunities for the youth. Often, nearly 80% of learners secure apprenticeships, with many subsequently transitioning into full-time roles.³¹ In parallel, colleges are increasingly partnering with EdTech firms to embed AI, data science, cybersecurity, and other much-in-demand technology disciplines into mainstream degree programmes, enabling graduates to enter the workforce with skills that are closely aligned with industry needs.

One message resonates across the industry: Skills matter more than degrees.

“Degrees today are not a priority; skillsets are. This underscores the need for curricula to be refreshed at least every six months in collaboration with industry, ensuring alignment with rapidly evolving business and technology requirements. Lifelong learning, industry-recognised micro-credentials, and practical, job-ready skills are increasingly becoming key differentiators in the job market. Equally important is the need for continuous faculty development. Institutes have begun exploring AI-powered teaching assistants capable of providing personalised, 24x7 learning support to students.”

- A senior government consultant working in the academic and skills space

³¹ Details obtained on the basis of an interview with a senior government consultant working in the academic and skills space





The opportunity ahead is significant. GCCs that act early and decisively will create new sources of competitive advantage. By building capabilities where value is migrating and transforming talent faster than demand evolves, they can convert India's talent advantage into enterprise advantage. In doing so, they will accelerate their move up the value chain—from execution to innovation, from service delivery to product ownership, and from capability centres to engines of intellectual property, frontier research, and AI-led value creation.

The way forward is to recognise skills as a strategic value-creation lever. Future capability depth will depend on how effectively GCCs, academia, technology platforms, skilling providers, startups, and policymakers align around a shared talent agenda.

A shared agenda for skills transformation

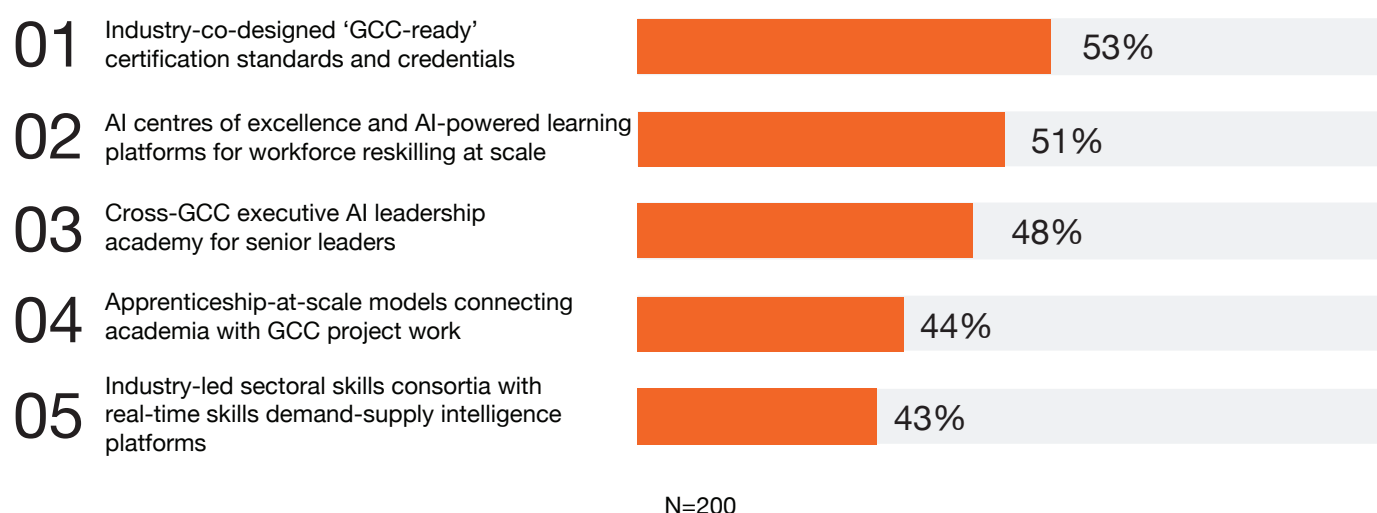
As highlighted earlier, our research underlines that GCC leaders favour a multi-dimensional, ecosystem-led approach. While interventions vary by sector maturity and capability requirements, the top five high-impact interventions are industry-ready certifications, AI capability infrastructure, leadership development, apprenticeships, and sector-specific skilling. Together, they provide the blueprint for transforming India's GCC workforce from capability-rich to AI-native, innovation-led, and globally competitive. Importantly, these priorities are already influencing how leading GCCs are redesigning their talent strategies for the future.

“ Our future talent model will be built around specialised capability clusters rather than broad functional roles. This would enable us to organise talent within our own organisation around the relevant specialities. Then we can access talent from a wider pool while balancing domain expertise with frontier skills. Also, flexible apprenticeship and try-before-you-hire approaches further help us evaluate talent in real-world settings before converting high performers into permanent employees.”

- Director and country manager of the India shared service centre of a financial solutions company



Figure 21: Top interventions by expected impact



Source: PwC India analysis of survey data

Note: Respondents could select more than one option.

As indicated in Figure 22, industry-designed GCC-ready certifications are emerging as one of the most impactful interventions in energy and utilities (73%) and retail and consumer (70%), reflecting the need for standardised, industry-recognised talent credentials.

At the same time, AI centres of excellence and AI-powered learning platforms are rapidly becoming foundational capability-building infrastructure, attracting strong support from healthcare (80%), pharmaceuticals (64%), life sciences (60%), and retail (59%). The findings also reaffirm that AI transformation is not merely a workforce challenge but a leadership one, with executive AI leadership academies emerging as a key priority across life sciences (80%), energy and utilities (60%), and BFSI (58%).

The data further highlights the growing importance of industry-academia integration and sector-specific skilling models. Apprenticeship-at-scale programmes are increasingly viewed as a critical mechanism for accelerating workforce readiness and reducing time-to-productivity, particularly in healthcare (80%), manufacturing (54%), and TMT (48%). Meanwhile, strong support for sectoral skills consortia, especially in pharmaceuticals (64%), energy and utilities (53%), and BFSI (50%), signals recognition that generic AI skilling alone will not be sufficient.

Figure 22: GCCs bet on sector-specific, ecosystem-led skilling

Interventions	BFSI	Energy and utilities	Manufacturing	Pharmaceuticals	Retail and consumer	TMT	Life sciences	Healthcare
Industry-co-designed 'GCC-ready' certification standards	52%	73%	50%	36%	70%	47%	40%	40%
AI centres of excellence and AI-powered learning platforms for workforce reskilling at scale	44%	40%	42%	64%	59%	53%	60%	80%
Cross-GCC executive AI leadership academy for senior leaders	58%	60%	31%	29%	41%	52%	80%	0%
Apprenticeship-at-scale models linking academia with GCC projects	36%	33%	54%	36%	41%	48%	40%	80%
Industry-led sectoral skills consortia with real-time skills demand-supply intelligence platforms	50%	53%	38%	64%	26%	41%	20%	20%
'Skill sprint' programmes with 8–12-week immersions in AI capabilities	46%	27%	23%	21%	33%	47%	40%	80%

Source: PwC India analysis of survey data

Note: Respondents could select more than one option.

The findings also reveal how GCC leaders view the Government's role. The priority is not short-term incentives, but the creation of a long-term talent ecosystem capable of supporting AI-led growth. GCC leaders are calling for interventions that strengthen the talent pipeline at its source. Industry-relevant AI and digital modules embedded into engineering and management curricula (57%) and Government co-funding for GCC reskilling programmes (51%) rank as the two most impactful policy reforms (see Figure 23). Mature GCCs strongly support the expansion of GCC ecosystems into tier-2 and tier-3 cities and mechanisms that provide real-time visibility into skills demand and supply. Tax incentives for R&D and workforce training, real-time data sharing between industry and academia, and easier access to global expertise are also seen as important enablers that can further accelerate capability building.

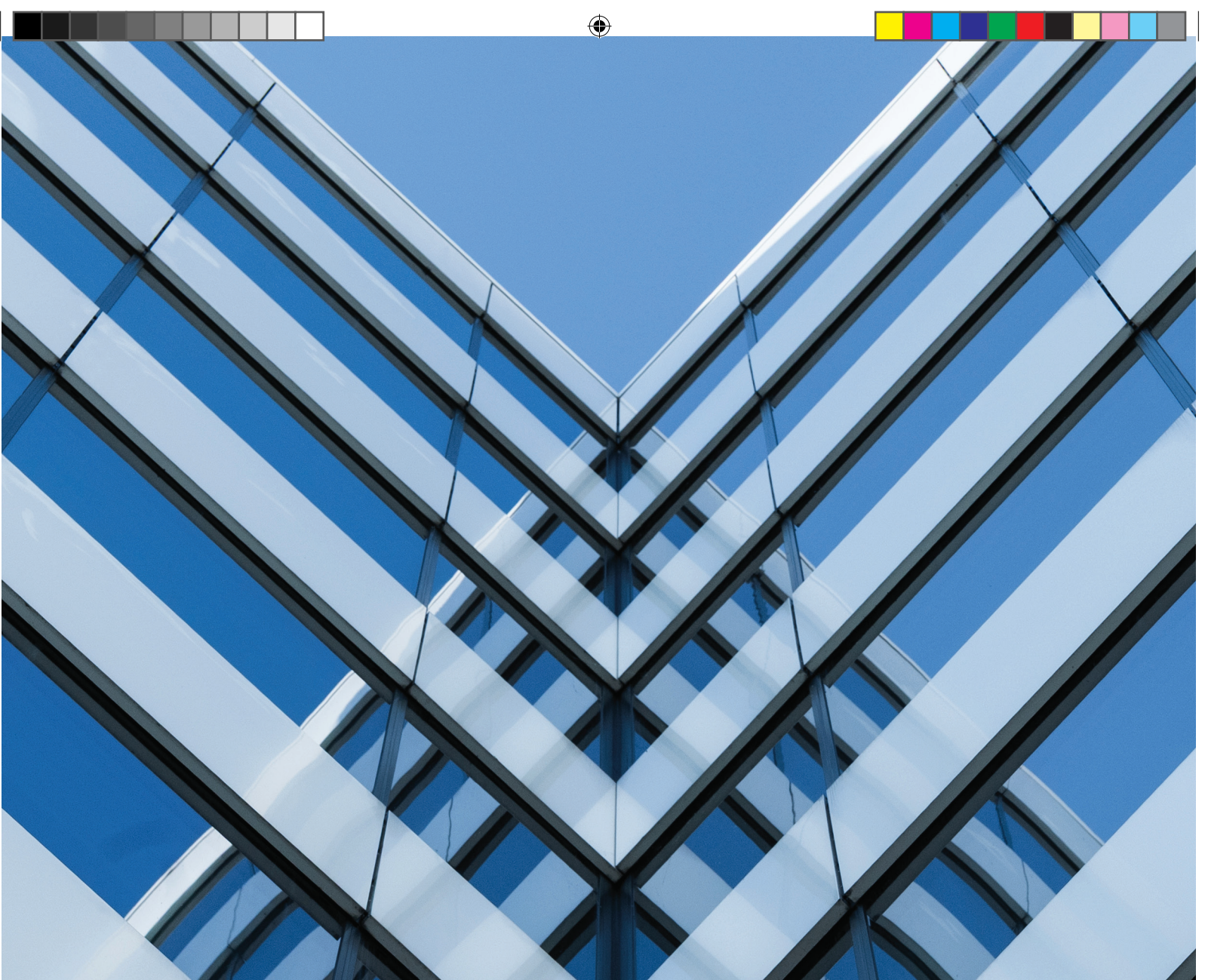
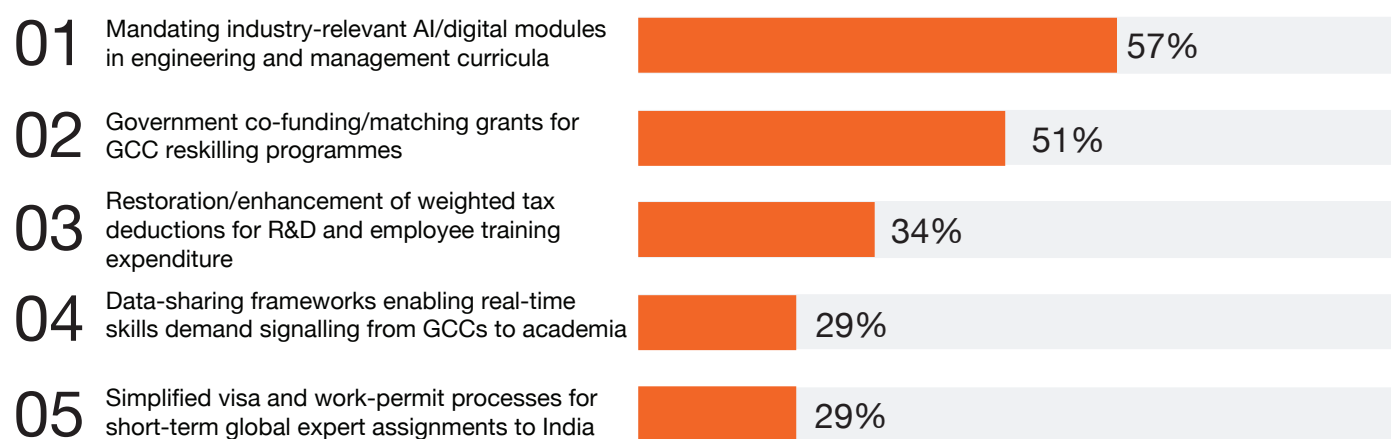


Figure 23: Top policy and regulatory reforms recommended by GCC leaders



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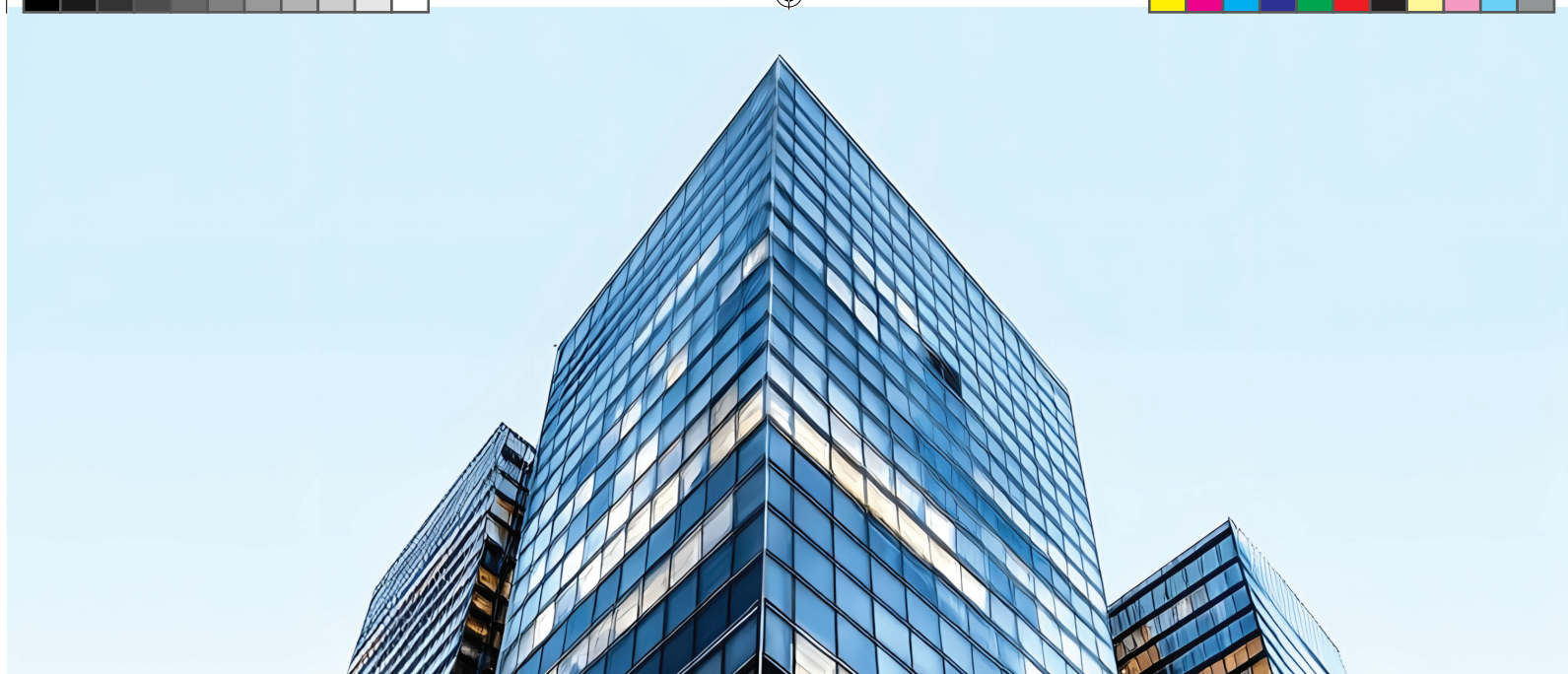
Source: PwC India analysis of survey data

Note: Respondents could select more than one option.

Call to coordinated action to build future-ready capabilities

Given that GCCs advocate a coordinated ecosystem approach with distinct but complementary roles for GCCs, policymakers, and industry bodies, the following are select recommendations:

Stakeholder	Recommendation	Key action
Government and policymakers	Modernise the talent supply architecture	- Embed AI and digital technologies into engineering and management curricula and encourage higher education institutes to use the All India Council for Technical Education's (AICTE's) Academic Bank of Credits and similar mechanisms so they can launch modules without full syllabus overhaul - Fund faculty training programmes in AI and co-delivery partnerships that help universities teach frontier technologies with industry support
	Co-invest in workforce transformation	- Introduce matching grants and co-funding mechanisms for GCC reskilling initiatives - Establish dedicated funding for frontier capability development
	Incentivise capability creation	- Enhance tax deductions for employee skilling and R&D investments - Encourage AI-related workforce investments through targeted incentives
GCCs	Build AI capability infrastructure at scale	- Establish dedicated AI centres of excellence - Deploy AI-powered learning platforms and internal skill academies - Scale 8–12-week AI immersion and 'skill sprint' programmes
	Invest in AI-ready leadership	- Launch executive AI leadership academies - Develop capabilities in AI governance, human-AI teaming, transformation management, and strategic AI decision-making
	Accelerate workforce conversion	- Expand apprenticeship and learning-while-earning models - Create structured pathways that shorten the transition from hiring to productivity
	Shift from training volume to capability depth	- Prioritise domain-specific AI, AI/ML engineering, GenAI, cybersecurity, AI governance, and product management - Tie skilling investments directly to business outcomes and workforce deployment



Stakeholder	Recommendation	Key action
Industry bodies and associations	Create GCC-ready certification standards	• Develop industry-recognised accreditation frameworks aligned with enterprise needs • Create common benchmarks for employability and deployment readiness • Strengthen upskilling platforms and democratise technology-enabled learning such as the Students Advancing Mindsets in AI, Robotics, Technology and Digital Hardware (SAMARTH) programme³² that aims to train 100,000 students in AI, IoT, and robotics, while equipping 500 schools with mini-laboratories for hands-on learning and training 3,000 teachers as technology mentors
	Establish sector-specific skills consortia	• Build capability clusters around domains such as FinTech AI, BioAI, smart manufacturing, and healthcare intelligence • Develop shared certifications and applied learning pathways aligned with industry needs, reducing the time required for talent to become productive and generate business value
	Create a GCC Skills Council	• Institutionalise real-time skills demand forecasting to ensure that university curricula and workforce training pathways remain closely aligned with future industry requirements • Create industry-recognised certification frameworks and common benchmarks for employability and deployment readiness • Build industry collaboration platforms to co-develop applied learning pathways and finance capability-building initiatives in priority areas

32 Government of India, Samarth portal (accessed as of 27 July 2026)





Way forward

“ India’s GCC journey is much larger than the story of one successful sector. It is about making India indispensable to the world’s knowledge economy and strengthening our long-term economic resilience. In doing so, we will only gain a new form of economic resilience and strategic relevance.”³³

- Finance Minister Nirmala Sitharaman

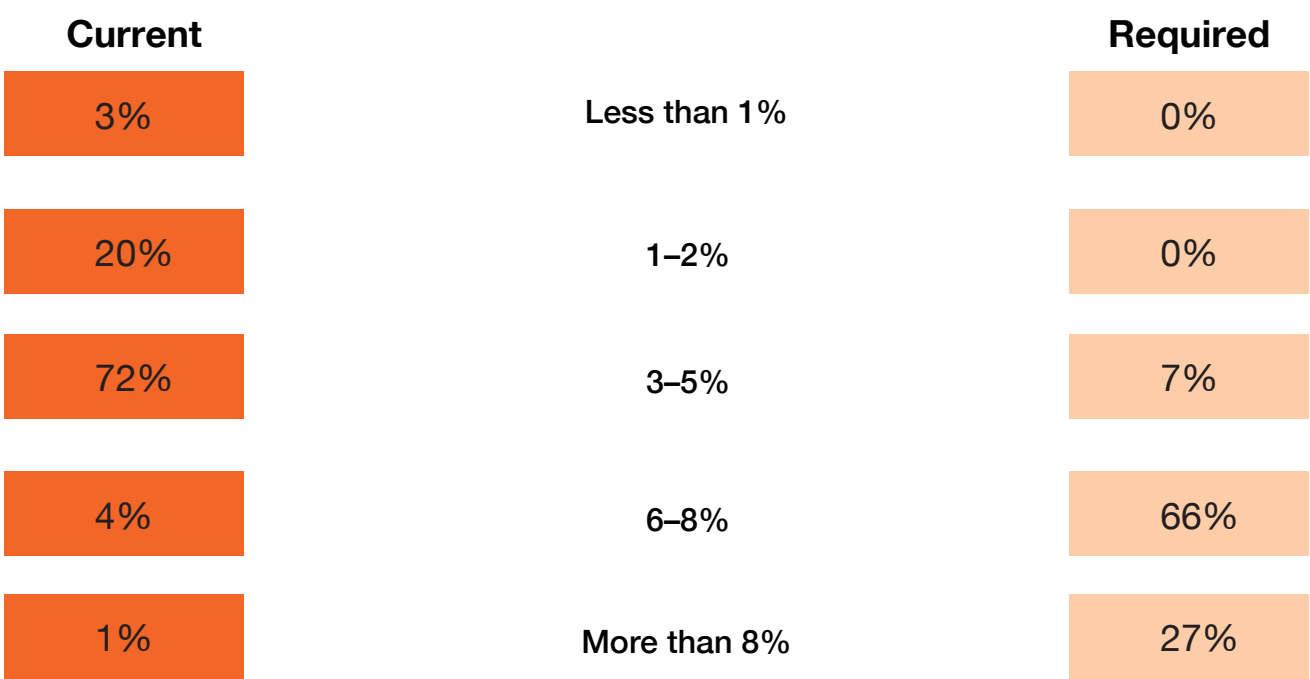
This observation captures the significance of the moment. Our research is a compelling blend of confidence and urgency: Nearly 90% of GCC leaders remain confident that India will retain its position as the world’s leading GCC destination through 2030, with 76% expressing cautious optimism. That cautious optimism stems from an awareness that as enterprise value creation becomes increasingly intelligence-driven, India’s continued advantage will depend on its ability to deepen skills, accelerate AI readiness, strengthen innovation capabilities, and build greater ecosystem-wide agility.

The research also points to a fundamental reality: The future of GCC competitiveness will be determined less by access to talent and more by the ability to build, mobilise, and scale it faster than demand evolves. As a result, talent investment is being redefined—from an operational expenditure to a strategic growth investment. Most GCCs currently allocate 3–5% of operating budgets to talent development. However, an overwhelming 94% believe investments must rise to at least 6%, with more than a quarter expecting spending to exceed 8%. The message is unequivocal: In the AI era, capability building is clearly a direct driver of enterprise value, innovation capacity, and strategic relevance.

³³ The Economic Times, India wants to lead, not just host, GCCs: Nirmala Sitharaman (accessed as of 27 July 2026); Nirmala Sitharaman’s address



Figure 24: Annual investment in talent development (% of operating budget)



Source: PwC India analysis of survey data N=200

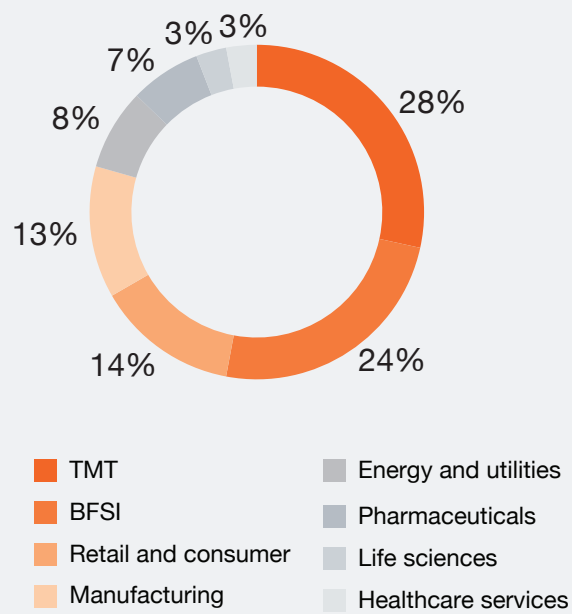
At the heart of this transformation lies a simple but powerful insight: The winners of the next decade will be those who can create composite capabilities at scale. Frontier skills in AI, data, engineering, and cybersecurity must be matched with foundational skills—that is, deep domain expertise, business judgement, problem-solving, and leadership capability. One without the other is incomplete. Together, they create the foundations of AI-native enterprises capable of translating technological advancement into sustained business outcomes and competitive advantage.

The path forward is therefore not incremental improvement but coordinated transformation. GCCs must accelerate workforce and leadership development; academia must modernise talent pipelines; technology partners must enable continuous capability building; and policymakers must strengthen the ecosystem through enabling regulation, infrastructure, and incentives. If these efforts converge around a shared agenda, India has the opportunity to convert its talent advantage into a lasting innovation advantage.

The next decade will belong not to those who preserve leadership, but to those who continually reinvent it.

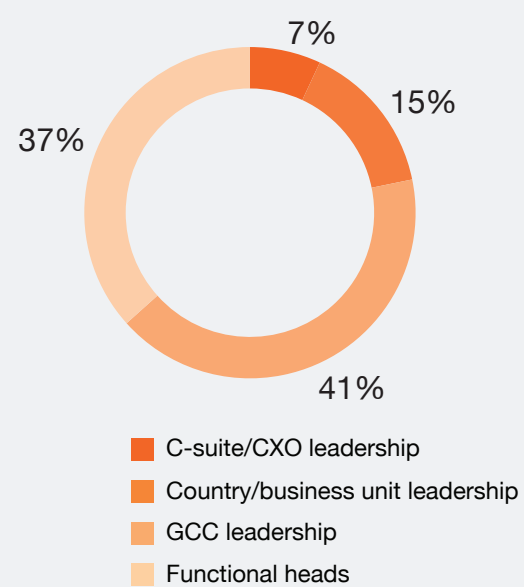
Survey methodology

GCC representation by industry



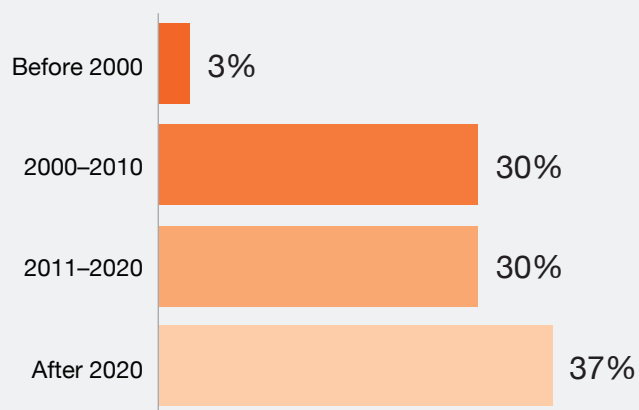
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Leadership profile of respondents



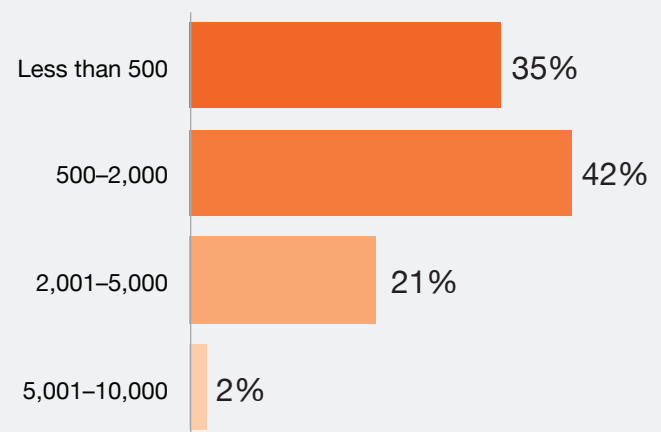
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GCC establishment timeline



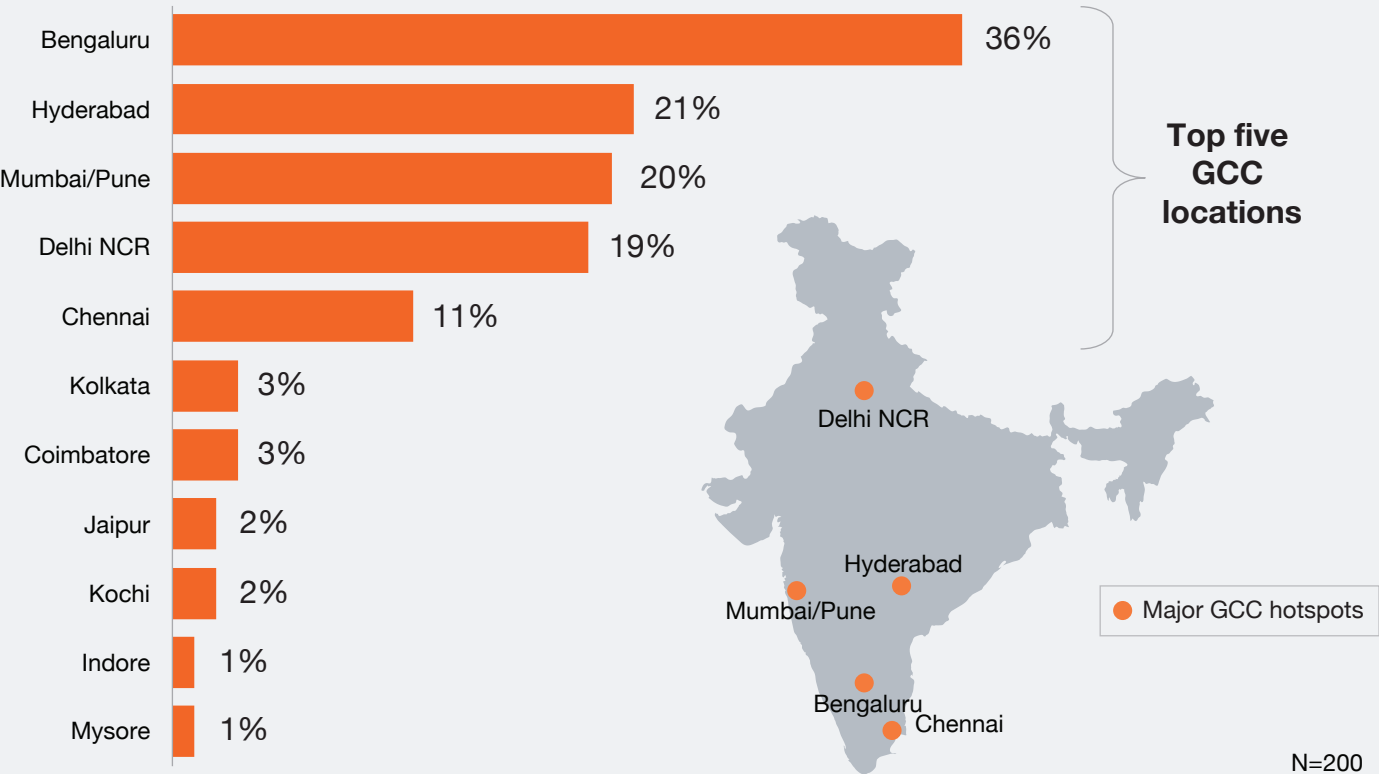
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Employee strength of GCCs surveyed



N=200

Geographic footprint of GCCs



Note: Respondents could chose more than one location.

Key demographic takeaways

The survey findings are primarily informed by senior decision-makers, with **~65%** of respondents holding leadership roles.

~40% of GCCs were established after 2020, underscoring the sustained momentum and global confidence in India's GCC ecosystem.

The rapid expansion has led to continued investments in new GCCs, with a large base of relatively young centres building future-ready talent capabilities.

The survey captures perspectives from established GCCs, with nearly **two-thirds** of respondents representing organisations employing **more than 500** professionals.

Respondents are concentrated in India's established GCC hubs, led by **Bengaluru, Hyderabad** and **Mumbai/Pune**.



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