Global capability centers (GCCs) pulse survey 2020

Driving the transformation agenda

A survey among GCCs in India

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EY
Building a better working world

Content

Preface

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Organizations across the globe are going through a change of unprecedented magnitude. Global capability centers (GCCs) are playing a crucial role in helping them navigate through these changes by carving out niche opportunities and driving the transformation agenda.

Due to their structure, capabilities and cost effectiveness, GCCs are uniquely positioned to play an even more integral role than before. The current pandemic has further accelerated this evolution to provide a proposition focussed on delivering enhanced business value to the parent organization.

We conducted the GCC Pulse survey 2020 with 31 GCC leaders in order to understand the strategic imperatives of the industry, with a focus on their vision, digital strategy, talent management, operations and resilience. We have covered aspects around adoption of the future operating model by GCCs in this study.

In this context, we present to you the conclusions of our study which aims at providing meaningful insights to our leaders. We expect our findings to help GCC players in India to design their medium and long-term strategy.

We thank all the participants for their contribution to the study and appreciate their time and valuable inputs. We also thank our team members for their effort. The Acknowledgments section of the report recognizes these team members.

1.1
Introduction

EY has been collaborating with global capability centers (GCCs) in India for over 11 years, driving the community's agenda and providing insights to support the evolution of their business.

Our past surveys have highlighted the importance of building product and process ownership, developing incubation capabilities and providing a technology platform by the GCCs for the larger organization. As most organizations have now overcome the early challenges in their journey, focus has now shifted to devising and updating their long-term strategy.

This year's survey focuses on providing guidance around the potential disruption expected in the service delivery model of GCCs, and the key themes emerging around

virtualization, adoption of emerging technologies and innovation.

While our interactions with industry leaders delved into their strategies around adoption of technology and expansion of existing service portfolio, we also touched upon specific areas around productivity, data security and talent management to understand the pulse of the industry.

1.2
Approach

The "GCC Pulse Survey 2020" offers a closer look at current trends among GCCs in India. The survey this year captures responses from 31 GCCs, catering to multiple geographies. These are setup by global organizations from varied industries, and have a diverse maturity profile and functional coverage.

About the survey respondents

GCC leaders across **31 global organizations** participated in the survey. These organizations have a GCC footprint in India as well as other parts of the world, with an average of ~2,200 employees based out of their India delivery centers.

These Indian centers provide services across Asia, Europe, North America, South America, Australia, Middle-East and Africa. In order to broad-base our understanding of the strategic imperatives of GCCs, we interviewed leaders representing Advanced Manufacturing and Mobility, Energy, Telecom Media and Technology, Consumer products (including Agriculture) and Financial Services sectors, with a varied maturity and functional profile.

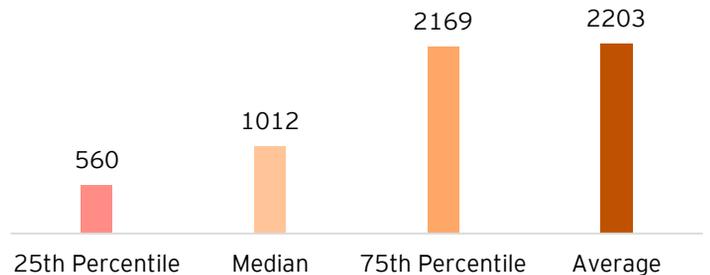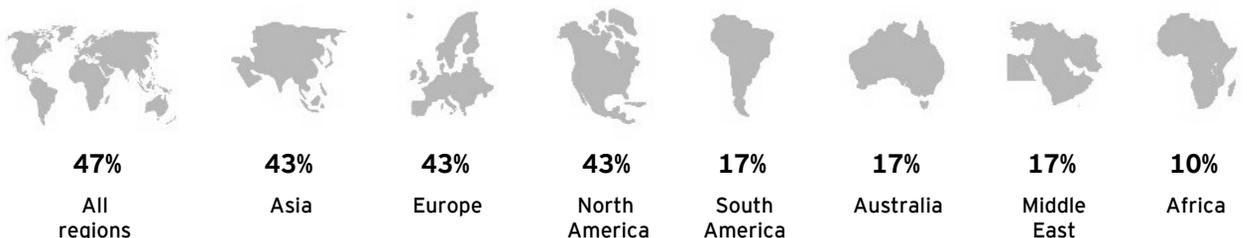## Industry categorization of the respondents

- 4%
- 7%
- 11%
- 14%
- 21%
- 43%

Telecom, Media & Technology
Consumer Products
Advanced Manufacturing & Mobility
Energy
Financial Services
Health Sciences & Wellness
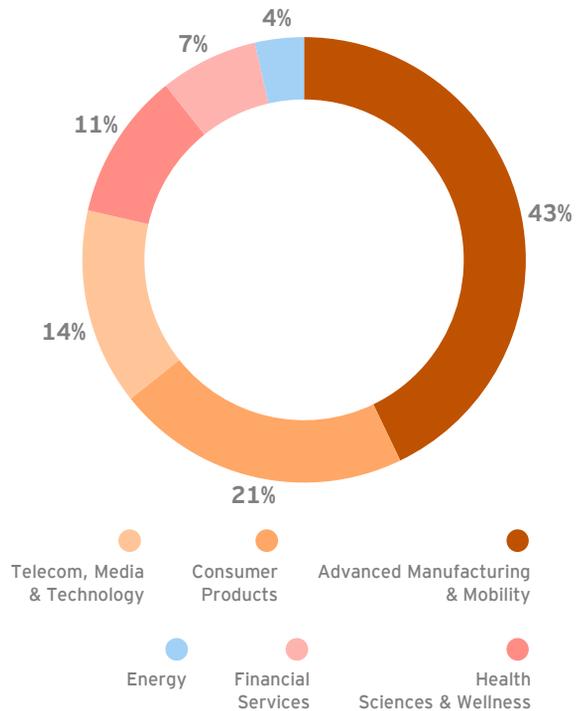
Average age of GCC

9 years

GCCs having revenue >US$ 5 b

75 %

How many FTEs are there at the GCC?

25th Percentile	Median	75th Percentile	Average
560	1012	2169	2203

Which regions are **serviced** by the GCC?

47%	43%	43%	43%	17%	17%	17%	10%
All regions	Asia	Europe	North America	South America	Australia	Middle East	Africa

Sum of percentages is more than 100% as respondents were able to select multiple answers

Methodology

The survey is designed to provide a holistic perspective on adapting new models of working and provides a closer look at current trends through the lens of the GCC landscape in India.

The study encompasses both primary and secondary research. As part of the primary research, EY engaged with GCCs through focused interactions capturing first-hand perspectives of GCC Heads, CEOs and CFOs. The findings were then combined with extensive secondary research and analysis.

The survey was conducted virtually over digital platforms, starting from June 2020. It consisted a customized set of 28 questions divided into five strategic pillars, keeping in mind the GCC imperatives.

The five pillars

The survey is categorized around five pillars - Vision and Strategy, Digital, Talent, Operations and Resilience. Each of these pillars have an important bearing on the way GCCs envision their future operating model.

Vision and Strategy

With a significant majority focusing on next generation thinking, the GCC leadership is now playing a critical role in defining their strategy centred on technology enablement and developing an innovation culture.

Digital

As part of the impetus on digital transformation initiatives, GCCs are reinventing products, engaging with customers, optimizing operations and empowering employees.

Talent

Employee engagement practices and talent management initiatives are paramount for success of any GCC with a sustainable focus on delivering customer centric offerings.

Operations

As service delivery evolves to remote and digitally augmented models, organizations need to navigate through the challenges around scalability and demand allocation.

Resilience

With the GCCs focussing on creating long-term resilience, they are revaluating their approach towards critical areas of risk management, data security and business continuity planning.

2.0
Vision and **Strategy**

Traditionally, the primary value proposition of GCCs has been consolidation of transactional activities, productivity improvement through scale benefits and operational cost optimization by leveraging arbitrage opportunities. Over the years, as their operating model has evolved, the focus of GCCs has gradually shifted to value adding processes, aligned to their aspiration to be a 'business partner' as against remaining a support organization.
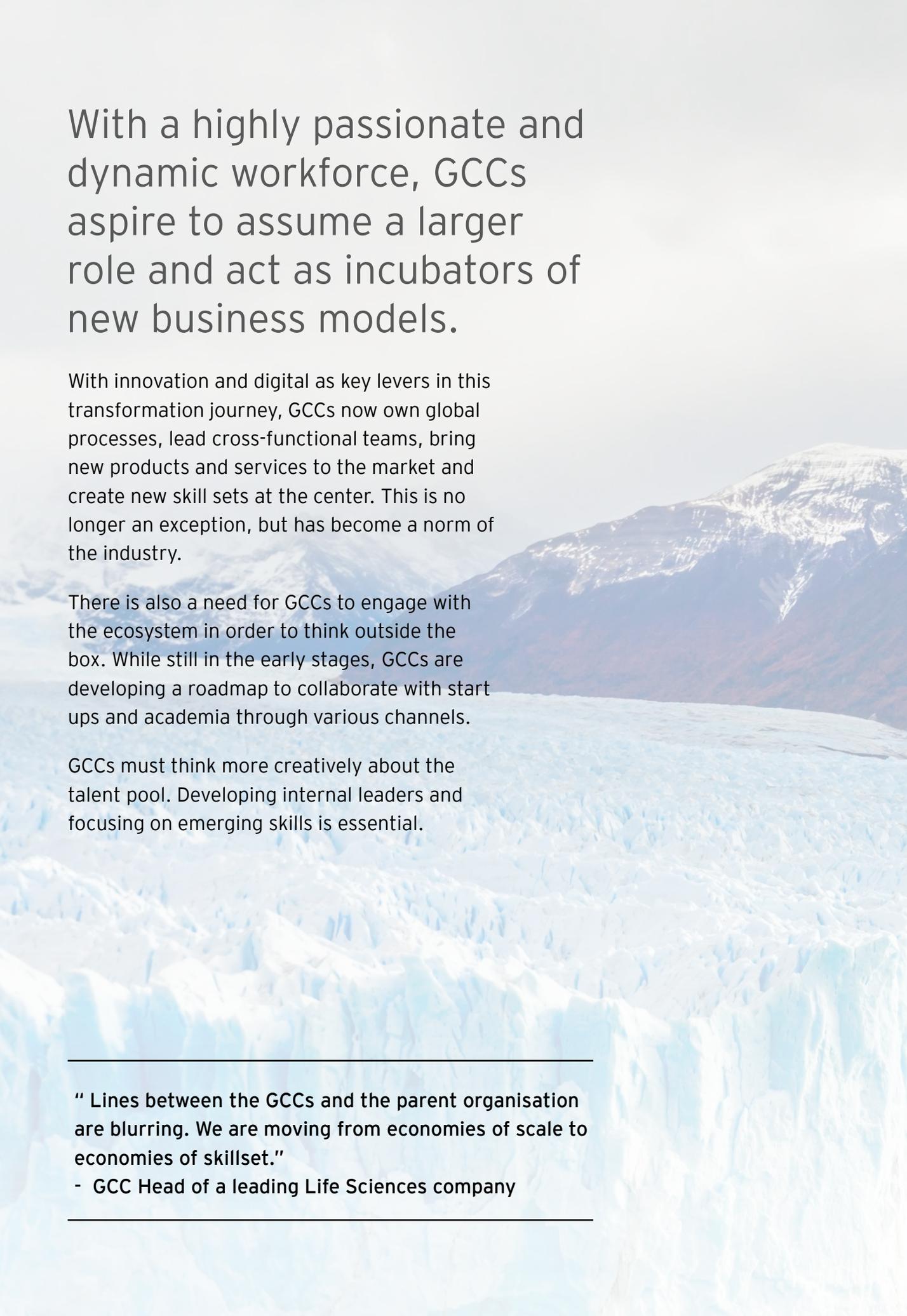
With a highly passionate and dynamic workforce, GCCs aspire to assume a larger role and act as incubators of new business models.

With innovation and digital as key levers in this transformation journey, GCCs now own global processes, lead cross-functional teams, bring new products and services to the market and create new skill sets at the center. This is no longer an exception, but has become a norm of the industry.

There is also a need for GCCs to engage with the ecosystem in order to think outside the box. While still in the early stages, GCCs are developing a roadmap to collaborate with start ups and academia through various channels.

GCCs must think more creatively about the talent pool. Developing internal leaders and focusing on emerging skills is essential.

" Lines between the GCCs and the parent organisation are blurring. We are moving from economies of scale to economies of skillset."
- GCC Head of a leading Life Sciences company

Key considerations for the GCC setup

100%

of the respondents said that their GCC have a detailed vision and strategy.

By having a detailed vision and strategy in place, a GCC ensures that its objectives are in line with the company's overall vision and strategy.

GCCs ranked innovation, technology enablement and enhanced service portfolio as the top three drivers of their strategy.
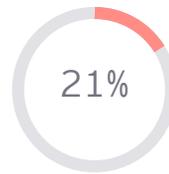
They also ranked competency and language capabilities above cost as the criteria that drives demand allocation across centers.

68%
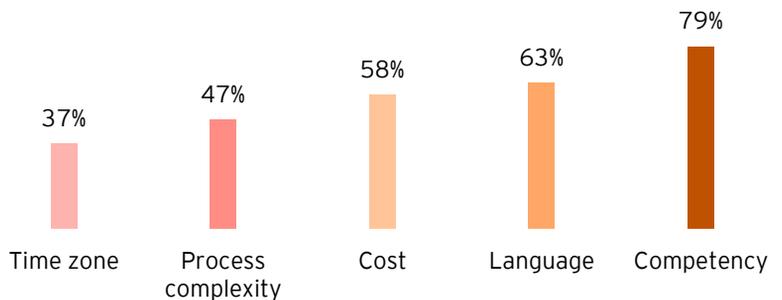Innovation and process excellence

55%
Technology enablement

34%
Enhanced service portfolio

24%
Skill development

21%
Risk optimization

What are the criteria used for demand allocation across centers?

- 37% Time zone
- 47% Process complexity
- 58% Cost
- 63% Language
- 79% Competency

Sum of percentages is more than 100% as respondents were able to select multiple answers

2.1

Innovation

is the primary focus area in GCC strategy

A majority of the participants have rated innovation and process excellence as the top-most consideration in their strategy.
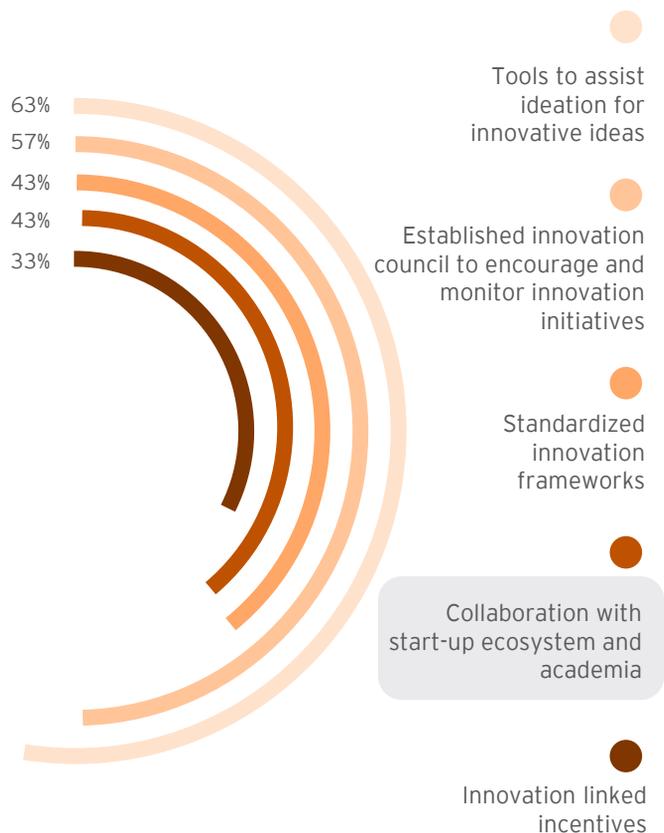
When it comes to encouraging the culture of innovation, a third of the organizations use innovation-linked incentives for employees, with around 63% ensuring easy availability of ideation tools.

A smaller but significant 43% consider collaboration with start-up ecosystem as an important lever to enhance innovation capabilities, with more than 50% of them already leveraging innovation frameworks to provide better value to the organization, in the form of design thinking, creativity and agility.
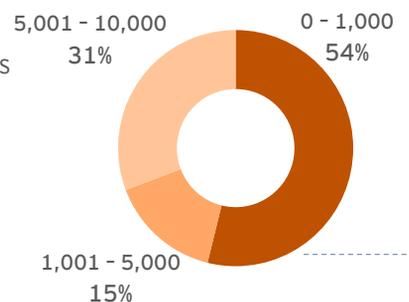
In one of the GCCs, the generator of an approved idea is considered as the business owner of the idea (a trend otherwise more prominent among larger IT Services organizations), and is supported through different funding mechanisms to take the idea to fruition.

"With India having a large ecosystem of start-ups, there are several incubation accelerators that have helped the collaboration between the GCC community and start-ups. Collaborating with the start-up ecosystem gives GCCs access to new business models that can help further the innovation agenda of the enterprise"
–**Arindam Sen, Partner, Operations and Business Services, EY India**

Key elements of innovation culture

63%
57%
43%
43%
33%

Tools to assist ideation for innovative ideas

Established innovation council to encourage and monitor innovation initiatives

Standardized innovation frameworks

Collaboration with start-up ecosystem and academia

Innovation linked incentives

Typically, small size organizations show a higher inclination to collaborate with start-up ecosystem and academia.

5,001 - 10,000
31%

0 - 1,000
54%

1,001 - 5,000
15%

Sum of percentages is more than 100% as respondents were able to select multiple answers

Technology

Enablement driving service portfolio expansion

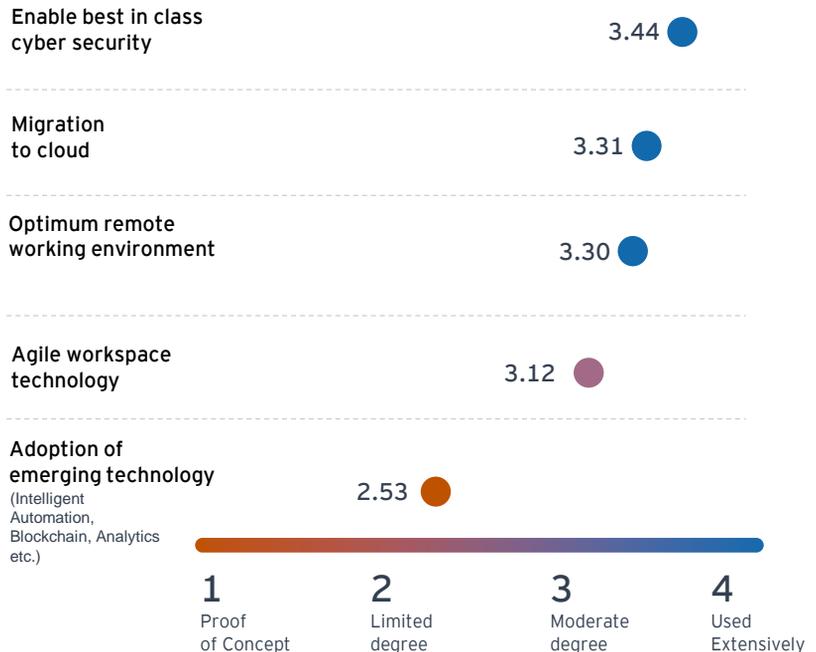Technology enablement has been rated as the second most important consideration in the GCC strategy.

Today, the discussion on technology has moved to a broader definition, given the shift to a virtual operating model. Ability to work seamlessly from anywhere has moved the needle towards migration to cloud, providing collaboration tools to support remote working and ensuring cyber security to protect the business from enhanced points of risk.

Almost all organizations that we spoke to had already started building out their technology roadmap or were way ahead on the implementation curve.
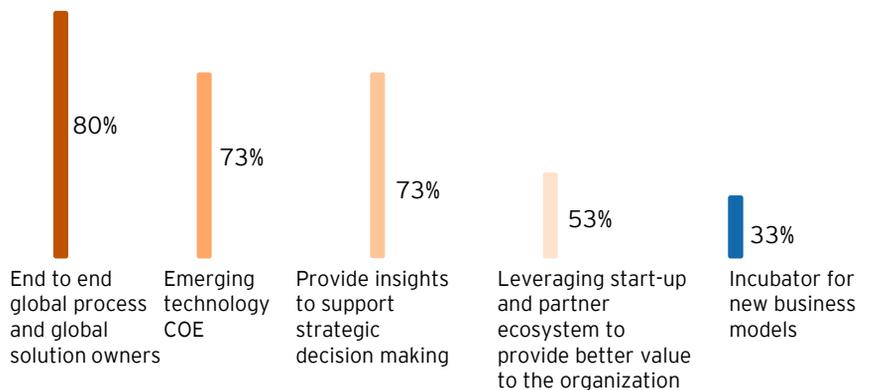
In order to get closely integrated with the parent organization, apart from having an intent to provide insights to support decision making process (focus area for 73% of the participants), as many as 80% of the participants look at having global process ownership as an enabler to achieve this objective.
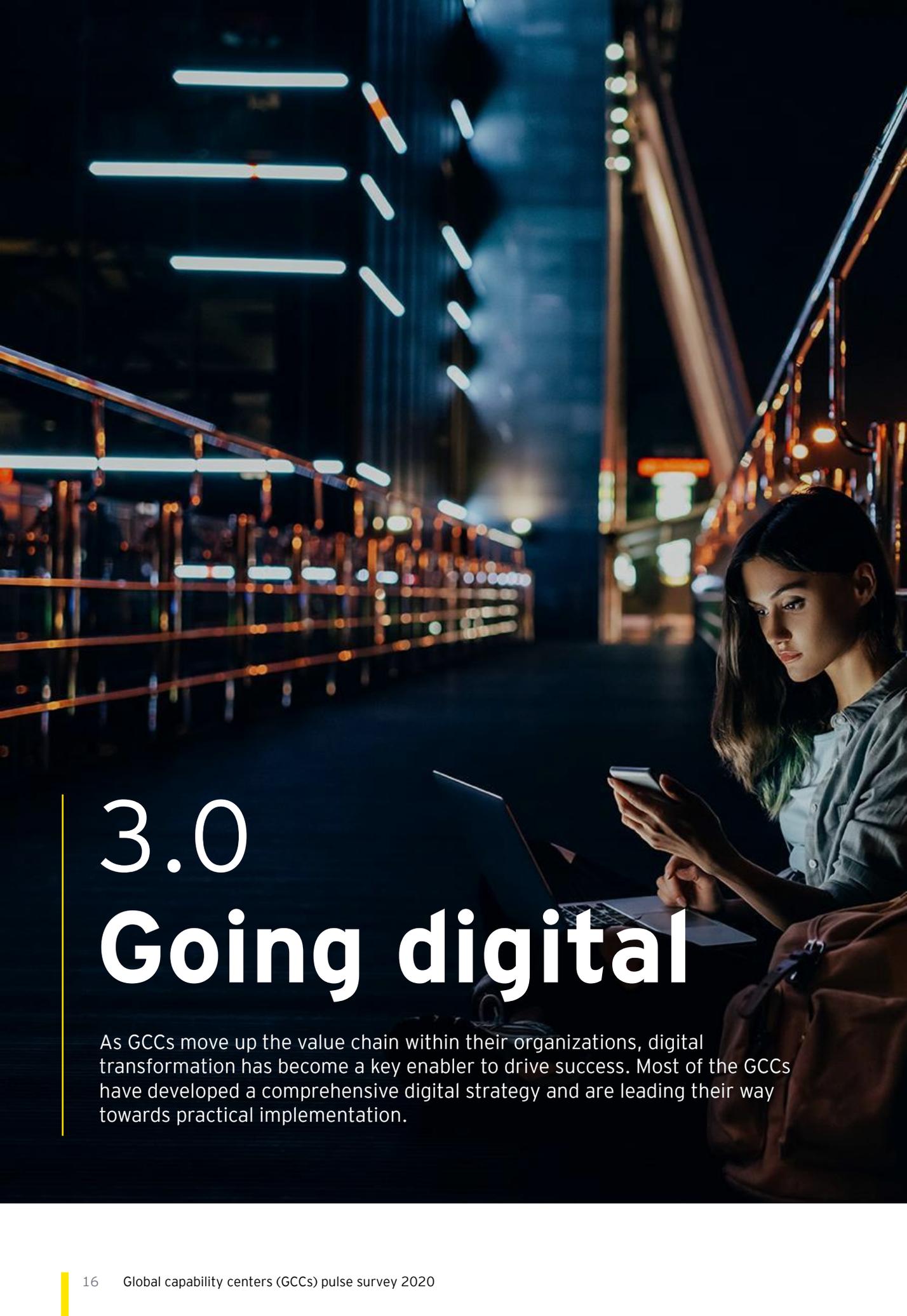
73% of the organizations look at establishing an emerging technology Center of Excellence (COE) as a key enabler in enhancing their service portfolio - a preference corroborated by the fact that more than two-thirds of the GCCs have a formal analytics COE in place.

The key focus areas in enhancing **the GCC service portfolio**

Key elements of **technology enablement**

Enable best in class cyber security	3.44 ●
Migration to cloud	3.31 ●
Optimum remote working environment	3.30 ●
Agile workspace technology	3.12 ●
Adoption of emerging technology (Intelligent Automation, Blockchain, Analytics etc.)	2.53 ●

1	2	3	4
Proof of Concept	Limited degree	Moderate degree	Used Extensively

- **80%** End to end global process and global solution owners
- **73%** Emerging technology COE
- **73%** Provide insights to support strategic decision making
- **53%** Leveraging start-up and partner ecosystem to provide better value to the organization
- **33%** Incubator for new business models

Sum of percentages is more than 100% as respondents were able to select multiple answers

3.0
Going digital

As GCCs move up the value chain within their organizations, digital transformation has become a key enabler to drive success. Most of the GCCs have developed a comprehensive digital strategy and are leading their way towards practical implementation.

Superior customer service (95%) continues to be the driving factor of the GCCs' digital strategy followed by process simplification through automation (89%).

A digital employee experience was third, with 79% of the GCCs incorporating this as a strategic initiative, showcasing the trend of the GCCs to be experienced as a truly digital organization and not leveraging only cost arbitrage as a value driver.
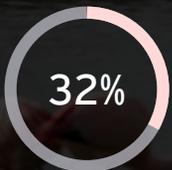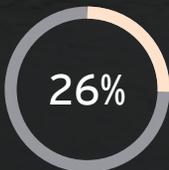
95%

Superior customer experience

89%
Process simplification through automation

79%
Digital employee experience

63%
Robust cyber security
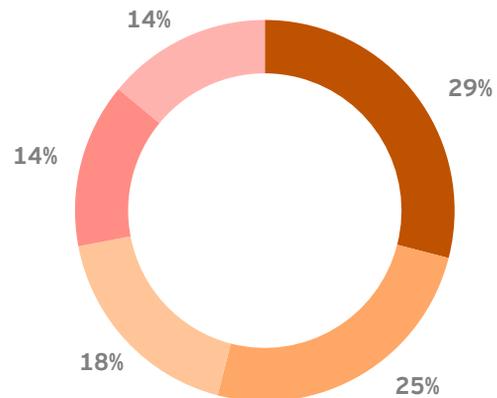
32%
IT/OT strategy

26%
Faster product development
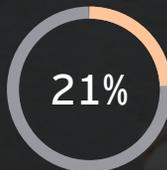
21%
Supply chain optimization

What percentage of the organization's **digital initiatives** are supported by the GCC?

As many as **43%** of the GCCs provide extensive support (> 60%) to the parent organization's Digital strategy initiatives, with an increased need felt by the GCCs to act as an incubation ground for Digital enablement.

14%
29%
14%
25%
18%

0 - 20%   > 80%   40 - 60%   20 - 40%   60 - 80%

Sum of percentages is more than 100% as respondents were able to select multiple answers

3.1

Analytics
is redefining value

Organizations are focusing on delivering insights as a strategic value lever. The ask from the GCCs has evolved from basic dashboarding to providing measurable value, and delivering actionable strategic insights is a key driver.

While all GCCs provide insights generated from service delivery back to the parent organization, mature GCCs have taken an ownership of the analytics function, as a value driver to organizations.

63% of the GCCs surveyed have a dedicated analytics COE. These COEs liaise across the business landscape, gathering requirements on providing strategic insights, embedding data to drive decision-making and moving the organization towards meeting its goals.
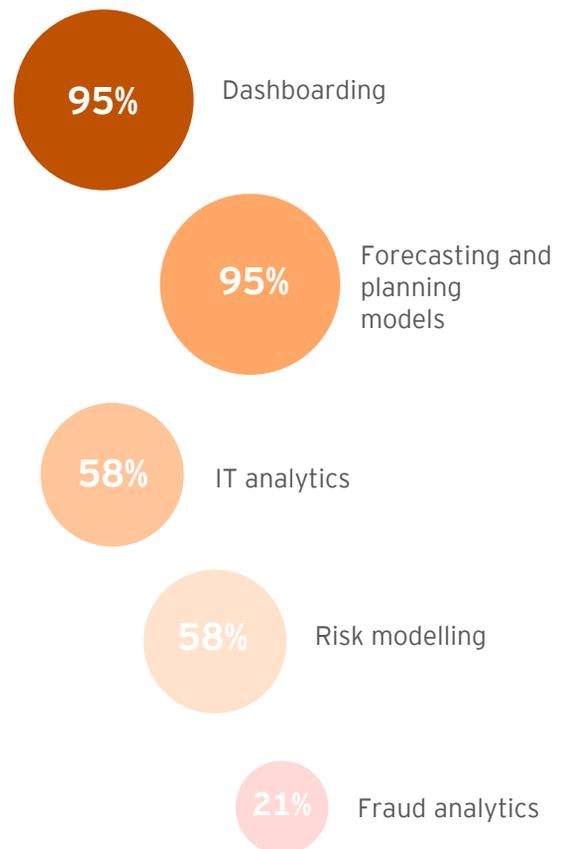
Analytics has been largely focused on finance, given the extended access to data through transaction processing. Dashboarding across the finance function scope and providing support on forecasting and planning models is indicated by 95% of the GCCs surveyed as current focus areas.

Interestingly, IT and risk analytics were delivered by over 50% of the GCCs, with 21% providing fraud analytics services, indicating a trend towards exploring insight delivery across the organization's value chain.

HR analytics was another area of rising interest, with a strong focus on talent management of the organization through development related analytics at 80%, followed closely by talent engagement and retention at 77%.

While there is a growing interest in analytics, as a part of the service scope, or as a COE supporting the entire organization through 'Insights as a Service', investment in technology and skills will continue to witness an uptick in the medium to long-term.

Key elements of analytics COE

95% Dashboarding

95% Forecasting and planning models

58% IT analytics

58% Risk modelling

21% Fraud analytics

Sum of percentages is more than 100% as respondents were able to select multiple answers

3.2

Blockchain

The new kid on the block

A small but increasingly significant number of GCCs are leveraging blockchain and its capabilities extensively and have started including adoption of blockchain as a part of their strategy to become the incubators of emerging technology.
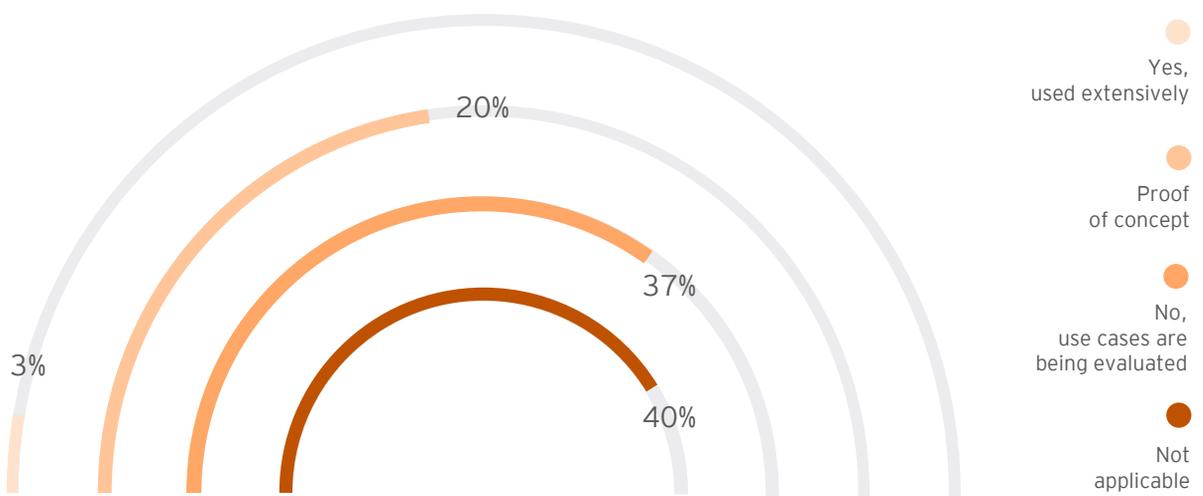
37% of the respondents stated that they are exploring Blockchain use cases, 20% said that they have initiatives in the proof of concept stage and only 3% are extensively leveraging Blockchain capabilities.

Amongst the firms who have adopted Blockchain, it was noted that adoption was higher among GCCs supporting IT and supply chain functions.

The survey indicates that the topmost value being sought by organizations through the deployment of Blockchain was greater transparency. Creating a new value chain, greater security and fraud reduction were stated as the other important value drivers.

Given the current scenario, Blockchain can support secure transmission of sensitive data during remote working environment enabling business continuity and efficiency. Additionally, it helps in prioritizing the development of solutions that can create value for enterprises and work on public networks, where they can achieve the best outcomes.

Does the GCC support Blockchain related initiatives?

20%

37%

3%

40%

Yes, used extensively

Proof of concept

No, use cases are being evaluated

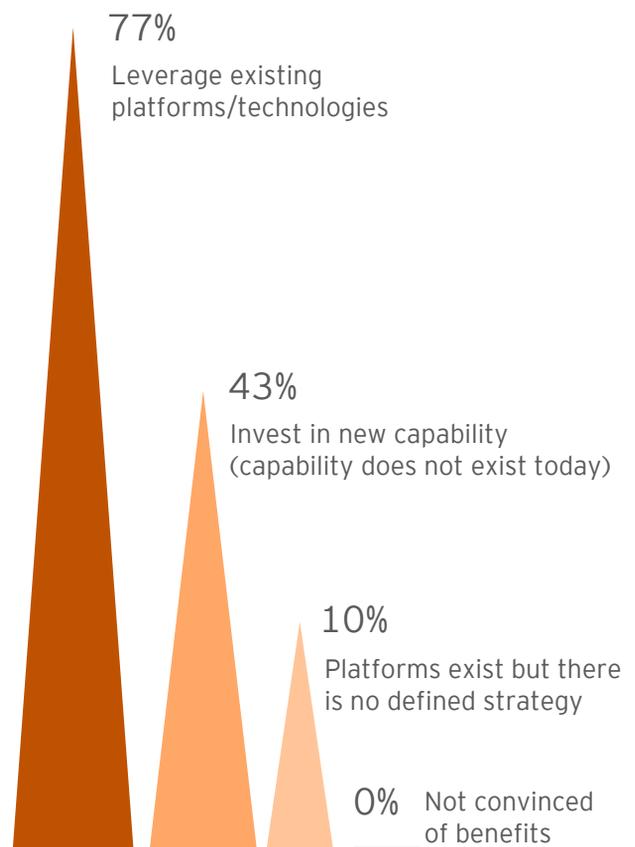Not applicable

3.3

Automation

Driving the 'intelligence' in GCC service delivery

Automation is being extensively leveraged to promote touchless transaction processing across all functional areas of service delivery. AI and cognitive are increasingly becoming an integral part of the organization's digital strategy

All the participants interviewed were convinced of the benefits of adopting intelligent automation in their digital landscape.

With GCCs consistently investing in automation over the last decade, a greater maturity is seen, with 77% of the respondents being able to leverage existing platforms / technologies to drive their automation agenda.

43% of the respondents have a focus on investing in new capability within the automation space and 10% said they have the platforms but did not have a strategy to define their automation journey. Moving beyond basic automation, a focus of many of the GCCs is to evolve towards the cognitive capabilities of the existing platforms and evaluate the applicability of the same in their respective domains.

77%
Leverage existing platforms/technologies

43%
Invest in new capability (capability does not exist today)

10%
Platforms exist but there is no defined strategy

0% Not convinced of benefits

''Over the years, adoption and evolution of Intelligent Automation has been a driving force behind digital transformation initiatives. GCCs are rapidly scaling AI and cognitive capabilities to drive end-to-end process automation''
- Vijay S Bhaskaran, Partner, Business Consulting, EY India

Sum of percentages is more than 100% as respondents were able to select multiple answers

4.0
Talent

As organizations explore virtualization, borderless talent, workforce flexibility options and learning in a virtual environment. GCCs are increasingly focusing on developing future-ready leaders internally, and are prioritizing talent management initiatives like right-skilling keeping long-term strategy in mind.

With an average of 2,200 FTEs in the centers, GCCs are placing a strong focus on talent development to ensure scalability in their operations.

93% of the respondents indicated that talent acquisition is the most important lever to drive scale, closely followed by right skilling of the employees (87%). Only 37% of the respondents use contractual staff for managing activities, clearly indicating the focus on developing in-house talent.

Talent acquisition /New hiring

93%

Right skilling of existing staff

87%

Outsourcing service provider

50%

Contractual staffing

37%

Key considerations for talent strategy

Sum of percentages is more than 100% as respondents were able to select multiple answers

Thinking "Creatively" about

Employee Development

Competency has been identified as a key driver for demand allocation across centers. Given the current business scenario, GCCs are focused on improving efficiencies in addition to reducing operational costs, to support the parent organization.
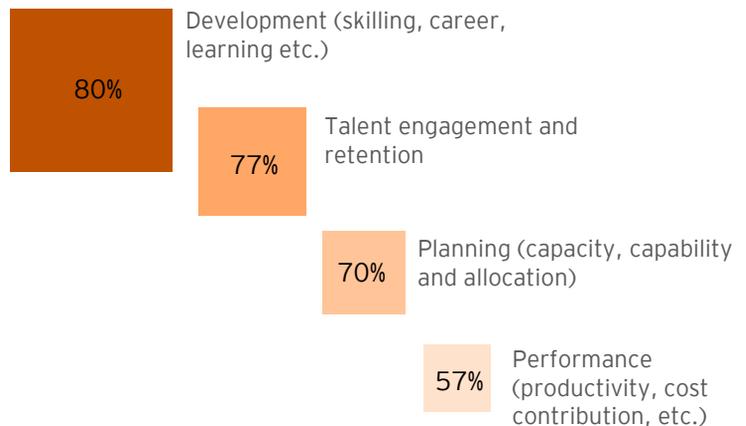
As the ambit of operations expands for the GCCs, identifying and retaining the right talent to support such scale of operations becomes important.

Employee development remains the top priority for GCCs followed by talent engagement and retention, with a broader strategic intent of right-skilling. This can be achieved through effective skill gap identification, supported by a digital learning platform with the latest learning opportunities for their workforce.
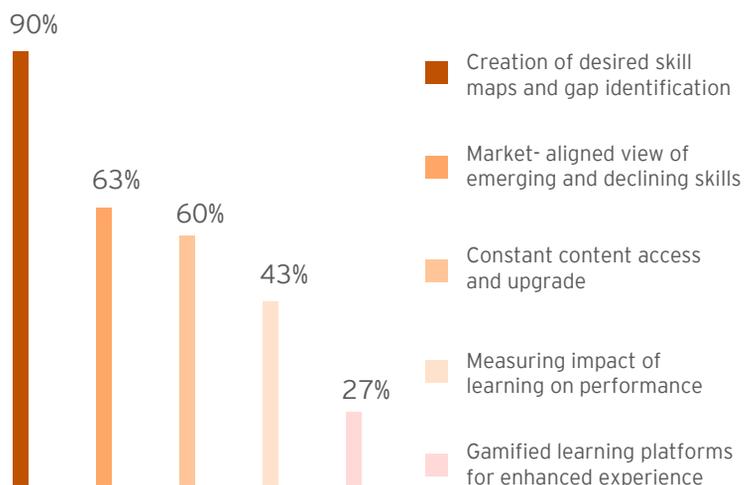
What are the top priorities for people analytics in the GCC?

With the percentage of millennials and Gen Zs increasing in the workforce, new-age methods such as gamified learning platforms are also under focus of significant number of GCCs. The efforts of the L&D team are focused on formal skill map creation, and gap identification to drive an outcome and result based learning framework.

However, only 43% of the respondents have frameworks in place which can measure the impact of learning on performance. Interestingly, our respondents seemed to be keen to move towards this model in the future.

80% Development (skilling, career, learning etc.)

77% Talent engagement and retention

70% Planning (capacity, capability and allocation)

57% Performance (productivity, cost contribution, etc.)

How does the GCC manage employee capability development?

90%
63%
60%
43%
27%

- Creation of desired skill maps and gap identification
- Market- aligned view of emerging and declining skills
- Constant content access and upgrade
- Measuring impact of learning on performance
- Gamified learning platforms for enhanced experience

Sum of percentages is more than 100% as respondents were able to select multiple answers
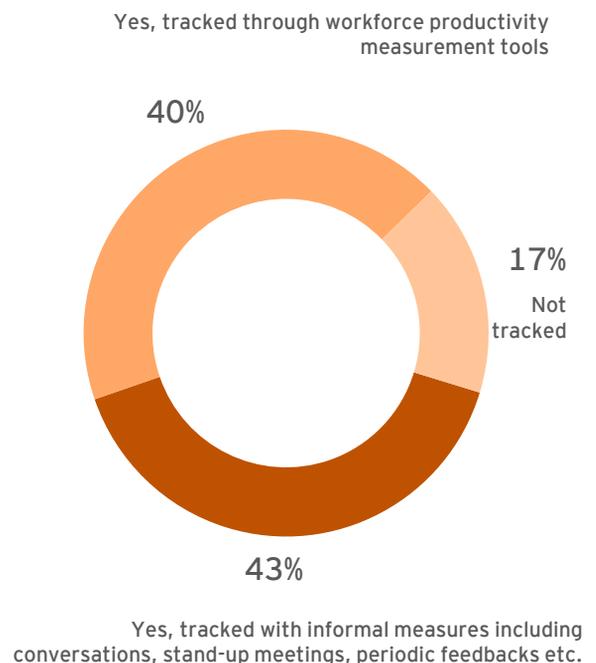
Managing

employee
performance

Managing employee performance in a remote working environment has pushed organizations to revisit their productivity measurement approach and adopt new performance measurement metrics.

Only 40% of the GCCs surveyed have tools to measure employee effectiveness and workforce productivity, with 43% leveraging informal communication and meetings to drive this assessment. 17% of the respondents do not monitor productivity at an employee level.

Given the rapidly evolving nature of virtual working practices, GCCs want to measure productivity. However, positioning performance management tools, without an impact on the culture of trust within the organization, is a key hurdle for the GCCs to cross.

Productivity levels have predominately increased during the COVID -19 lockdown. This could be due to various factors such as lower volumes of transactions and fewer distractions. The real trend-line and productivity statistics can be accurately assessed only when the transaction volumes, client demand and most importantly, the general lifestyle of employees goes back to pre COVID-19 levels.

Do you measure employee productivity?

Yes, tracked through workforce productivity measurement tools

40%

17%
Not tracked

43%

Yes, tracked with informal measures including conversations, stand-up meetings, periodic feedbacks etc.

"Monitoring productivity is simple, however, fostering an innovation and entrepreneurial culture in a virtual environment is the real challenge."
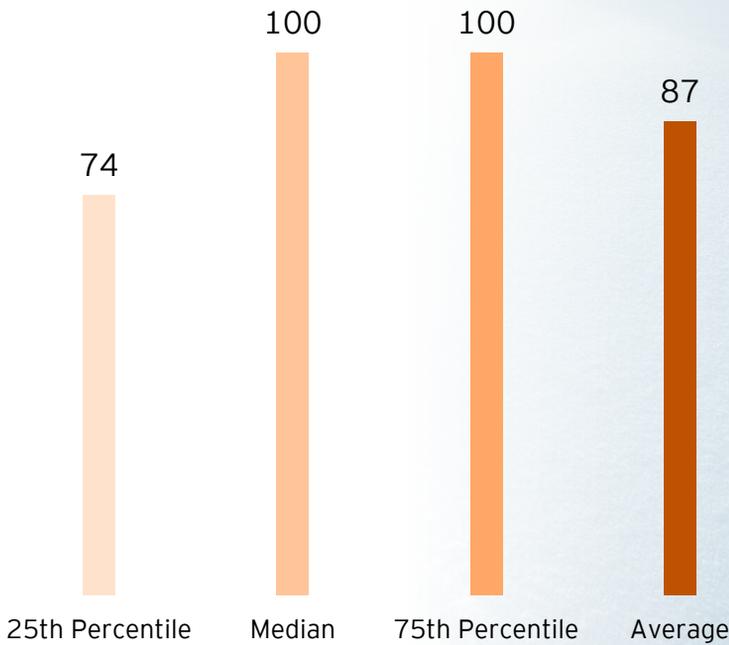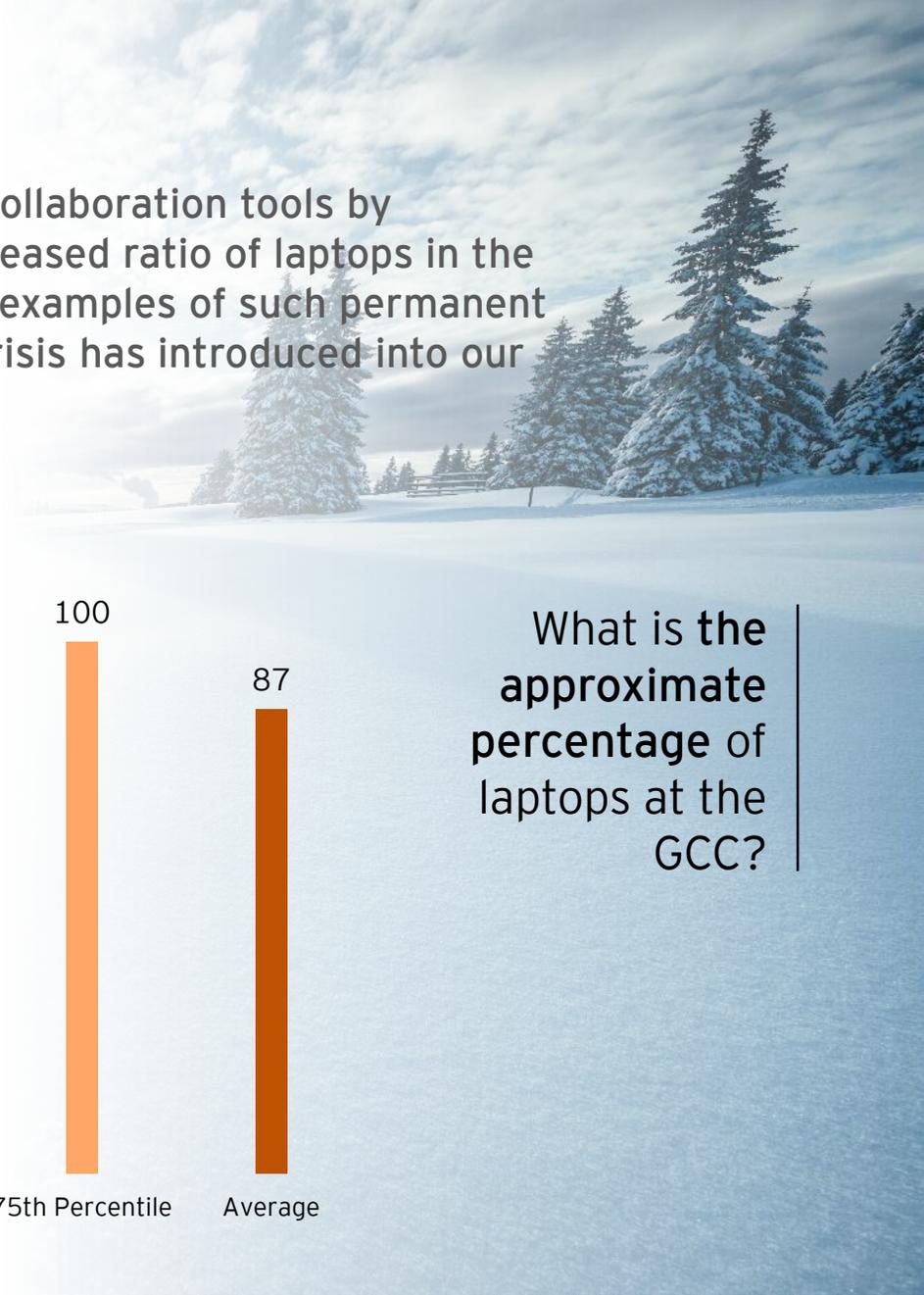- **GCC Head of a leading Agrochemical company**
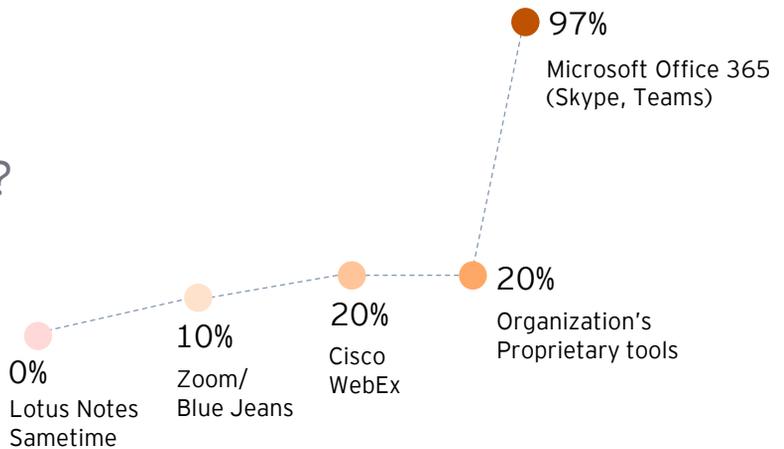
5.0
Sustainable recovery

After dealing with the unprecedented challenges posed by COVID 19, most of the organizations have now moved into the recovery phase. The initial steps adopted to ensure minimal business disruption have now become the norm of how organizations will operate in the future.

Rapid adoption of collaboration tools by employees and increased ratio of laptops in the device mix are two examples of such permanent changes that the crisis has introduced into our ways of working.

What is **the approximate percentage** of laptops at the GCC?

25th Percentile	Median	75th Percentile	Average
74	100	100	87

What platform(s) do you use for working remotely?

97%
Microsoft Office 365 (Skype, Teams)

20%
Organization's Proprietary tools

0%
Lotus Notes Sametime

10%
Zoom/ Blue Jeans

20%
Cisco WebEx

Sum of percentages is more than 100% as respondents were able to select multiple answers
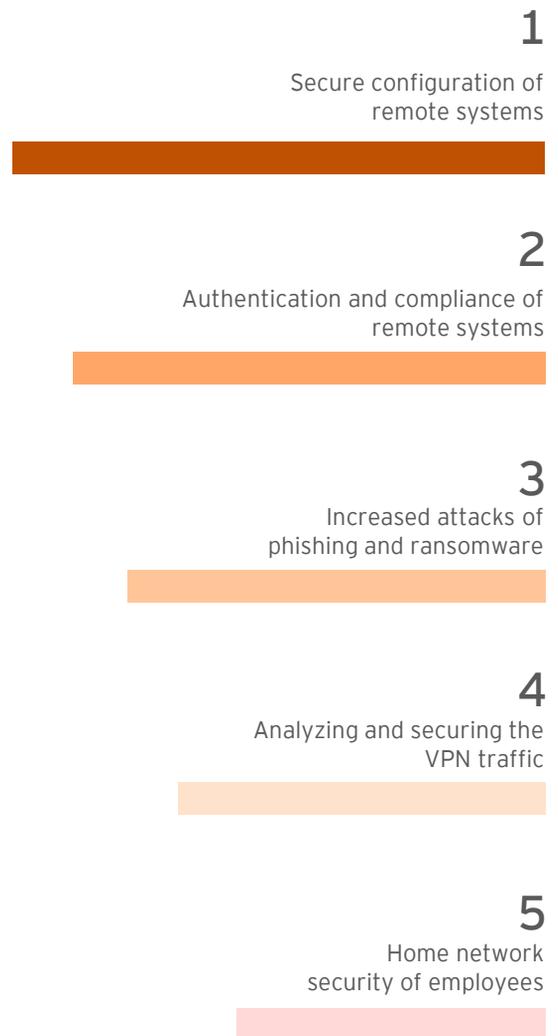
Adding new dimensions to
Business Continuity Planning

Although most of the organizations have maneuvered their way out of issues related to VPN sizing, remote working environment and domestic bandwidth, data security remains a key concern.

Assessing whether the current control environment around data security is practical and fit for purpose for the future needs of GCCs has been one of the most important focus areas since the onset of the pandemic.

Secure configuration of remote systems has emerged as the top priority for GCCs when it comes to creating a robust and secure environment. As we navigate through this crisis, each day continues to be a test of the organization's business continuity plan. 83% of our respondents stated that their frequency of Business Continuity Plan (BCP) testing ranges between quarterly and annually, however, this is expected to increase in the future. These recent events have rewritten what is required to ensure effective business continuity.

As culture, policies and ways of working continue to evolve, companies are aggressively thinking about the fundamentals of their BCP by giving a harder look at workload balancing, location strategy, skill set and most importantly, the newly added dimension of hybrid and virtual operating model. On one hand, adoption of virtualization inherently reduces the risks to business continuity as it adds more flexibility, less dependency on the on-premise hardware and work location, it is also forces GCCs to think about technology investments, scalability and job restructuring amongst many other things.

1
Secure configuration of remote systems

2
Authentication and compliance of remote systems

3
Increased attacks of phishing and ransomware

4
Analyzing and securing the VPN traffic

5
Home network security of employees

"The maturing of technologies has been a Cambrian explosion - accelerating and facilitating the shift towards remote working. What is less clear and certainly deserves more attention is how we will build the right culture and a sense of shared ownership in the absence of physical presence."
- Sunil Venkatesh, Partner, Business Consulting, EY India

6.0
Hybrid is the future

As we continue to evolve strategies, there is a differentiated focus across Work, Workforce and Workplace, to tap into the benefits from the 'new normal' to move into the next stage of maturity.

COVID-19 has brought a significant change in the ways of working . Increased digitization, agility, personalization, shifting mindset to favour flexibility, freedom and independence of work are some of the mega trends which are redefining the operating model for GCCs in the future.

In order to ensure a seamless transition into the new normal, GCCs are rethinking across the attributes of culture, people, technology, performance and policy.

Culture

Driving organization culture even without the benefit of on-the-job learning in a physical workplace. In the absence of physical cues, sustaining organizational values becomes a real challenge.

People

Redefining how leaders engage, enable and lead remote teams will set the trajectory for success. The people management skills of the managers will act as a key enabler in the new work environment.

Technology

Embracing emerging technology will act as the common lever across all dimensions of the operating model. Revamping the technology strategy will enable agile and secure operations.

Performance management

Building measures and digitizing performance management holistically will be key to ensuring success. Holistic tracking and reporting of employee, functions and GCC performance is important.

Policy

Assessing and creating new policies to cater to the evolved business model will ensure effectiveness and control. Policies around telecommuting, IT & data security, benefits and compensation, and tax and mobility will set the base for the new normal.

''As GCCs continue to transition from 'Work from Office' to 'Work from Anywhere', sustained virtualization provides benefits of access to a boundary-less talent pool, optimized operating costs and employee flexibility. However, true adoption of this model, requires careful consideration of several elements across culture, policies, technology and performance management.''
- Kunal Ghatak, Partner, Business Consulting, EY India

While almost 100% virtualization of GCC operations has been a direct result of COVID-19, it has shattered some long-standing resistance to sustained telecommuting.

Almost 60% of the GCCs we reached out to were comfortable having 20%- 40% of their staff operating virtually by 2023.

■ 0 – 20%	■ 20 - 40%	■ 40 - 60%	■ > 80%	■ 60 - 80%
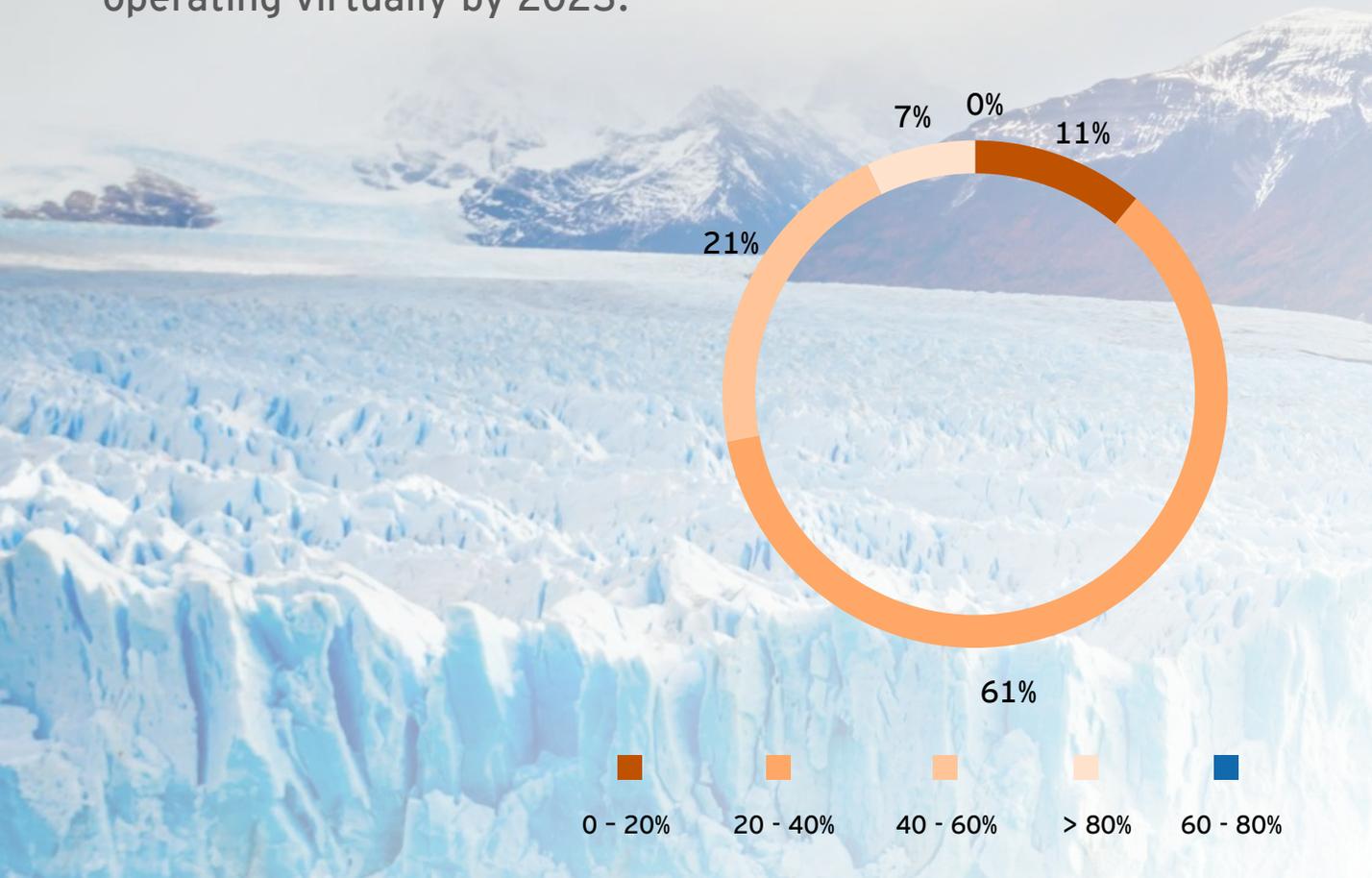
Needless to say, the thought process around this has constantly evolved even as we went through this exercise – we observed a higher number of organizations selecting a lower remote working scenario as we progressed through the survey, indicating a shift in thinking patterns, taking into account organizations' understanding of the real impact of various scenarios being considered.

However, the operating model and the role of the office in the new normal has certainly changed the way we think and will change the way we work.

"By 2023, expectation is to have all productive work done remotely, and for the office premises to be used primarily for cultural assimilation; large, soft-skill based trainings; and HR meetings requiring face-to-face interactions." – **A participant quoted**

The tendency to have employees back in office was seen to be higher among GCCs where the broader cultural context and the alignment to parent organization's ways of working was a deciding factor. A few of the participants highlighted the employees' "craving" for the social connect provided by a physical working environment as another key influencer in this decision. Kind of work being performed in the GCCs is the next big determinant – even though collaboration platforms have been able to step up to the communication challenge, activities involving higher level of ideation are preferred to be carried out in an office environment.

One area requiring an increased focus from the GCC leadership will be to develop an approach around agile workplace environment, what with only 17% of the GCCs indicating this as a part of their future technology enablement imperatives.

In summary, the GCC community is poised to exploit the interesting opportunities presented by the pandemic as a springboard to become a value adding strategic business partner to the enterprise.

The advantage of GCCs in India is really the availability of technology talent and ability to scale. No other geography provides that – Scale, Quality, Speed and Cost.

- Rajiv Memani, Chairman and Managing Partner, EY India

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