



MOAR ADVISORY
Research & Talent intelligence Leadership
White paper | June 2026

The GCC Workforce Reset

Talent | Technology | AI
| Culture

Exclusive to attendees of



How Global Capability Centers are
redefining workforce strategy in the era
of Artificial Intelligence

June 2026 | moaradvisory.com

Table of contents

Executive Summary + Key Findings

3

Section 1

India's GCC Ecosystem, Scale, Maturity & Structural Shift

5

Section 2

Emerging Talent Trends & Workforce Dynamics

8

Section 3

AI & Automation, Redefining Roles, Skills & Value Chains

11

Section 4

Upskilling, Reskilling & Leadership Development

14

Section 5

Culture Transformation & Employee Experience

16

Section 6

GCCs as Innovation & Value-Creation Engines

17

Section 7

Workforce Planning, Hybrid Models & Organisational Agility

19

Section 8

Industry Benchmarks, Market Trends & Outlook to 2030

21

Conclusion | The Workforce Reset as Strategic Inflection

24

About MOAR Advisory Solutions

25

Research Credits & Disclaimer

27

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Executive Summary

India’s Global Capability Center ecosystem has crossed an inflection point that transcends headline numbers. The latest research benchmarks, synthesised across primary industry reports and MOAR Advisory’s proprietary talent intelligence, establish **2,117 GCCs** operating across India, generating **\$98.4 billion** in market revenue and employing **2.36 million** professionals. These are present-day realities, not projections. They fundamentally redefine the strategic weight of India’s GCC sector in global enterprise architecture.

The more consequential story is structural. India’s GCCs are evolving, definitively and irreversibly, from support-function delivery hubs into enterprise nerve centres: AI and data intelligence nodes, product engineering ecosystems and global decision-making layers for the world’s largest multinationals. Stanford University’s 2026 AI Index confirms that Generative AI has achieved 53% global population adoption in just three years, faster than the personal computer or the internet.

2,117 Active GCCs in India (MOAR Research 2026E)	\$98.4B GCC Market Revenue (MOAR Research 2026E)	2.36M GCC Workforce Employed (2026E)
53% GenAI global adoption in 3 yrs, faster than PC or internet (Stanford 2026)	88% Organisations actively adopting AI (Stanford 2026)	\$2.52T Worldwide AI spending in 2026 (Gartner)

Note: E indicates – Estimates

Key Findings at a Glance

GCC Talent & Culture - GCC attrition runs at 12–14%, structurally below the Indian IT services average of 13–16% and well below India Inc.’s ~17%, with average tenure of 4–6 years versus 2.5–4 years in IT services. - GCCs maintain a 20% compensation premium over equivalent IT services roles; 71% now offer ESOPs, RSUs, or SARs, and AI/ML specialists command an additional 32–47% premium above generalist peers.	- Global leadership roles originating from India are growing at ~40% CAGR, reaching 6,500+ in 2024, including 1,050+ women leaders, and are projected to exceed 30,000 by 2030. - MOAR Research: 95% of GCCs operate permanent hybrid models; 63% of employees are willing to trade compensation for flexibility. - Reskilling at scale: By 2030, 39% of workers’ core skills are expected to be transformed or rendered obsolete (WEF 2025), yet only 16% of individual workers currently have high AI readiness.
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GCC Technology & AI

- 83% of GCCs are scaling GenAI; 58% investing in Agentic AI, the transition from pilot to production is complete.
- Only 12% of GCCs have mature AI governance, yet 78% plan significant AI investment in 2026, the governance gap is the defining risk.
- Employment for software developers aged 22–25 has fallen nearly 20%, the youngest workers carry the highest AI exposure.
- Anthropic Economic Index: India is the #2 Claude market globally, evidencing elite-tier AI readiness beyond headline adoption numbers.
- AI productivity is proven, not projected: Organisations deploying AI at scale are reporting software development productivity gains of 26%, marketing output gains of 73%, and customer support gains of 14–15% (Stanford HAI 2026). The average AI ROI stands at \$2.60 for every \$1 invested (Accenture 2025), with scaled GCC deployments averaging 3.2x returns.

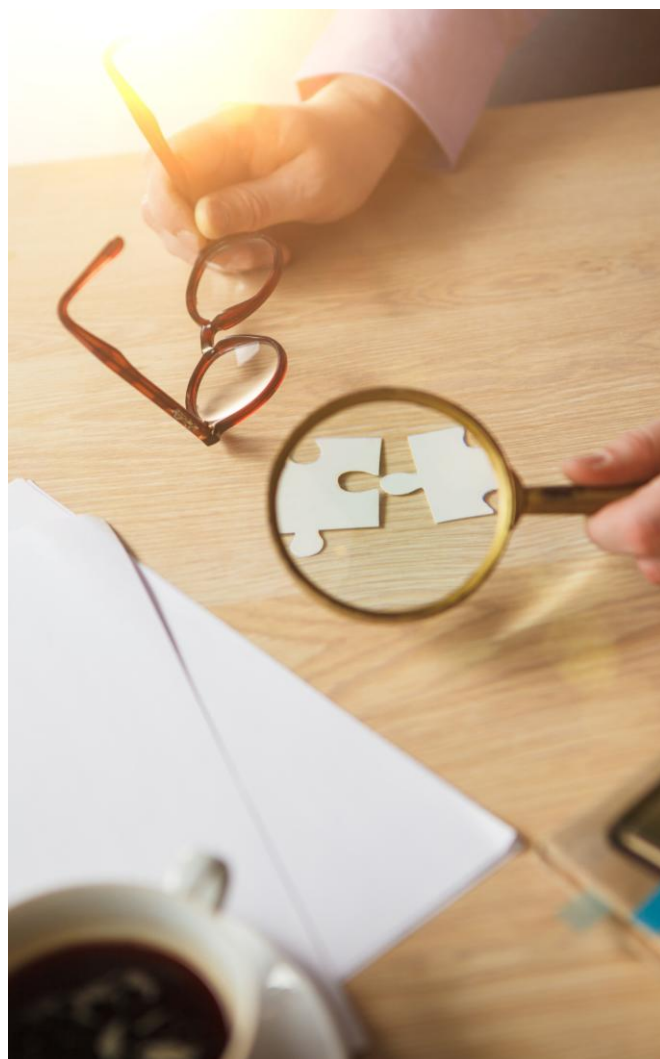
GCC Market & Innovation

- 92% of GCC leaders report their centers now drive genuine innovation beyond cost reduction, with 61% making digital transformation their top priority for the next 12 months and GCC AI spend projected at \$4.7 billion by 2027.
- India's AI market is projected to reach \$131.31 billion by 2032 at a 42.2% CAGR, while the GCC workforce is forecast to grow from 2.36 million today to 3.46 million by 2030.

- Tier-2 cities offer 20–35% lower operational costs and attrition rates 10–12 percentage points below Tier-1, and are projected to house 39% of the total GCC workforce by 2030, up from ~15–20% today.

Real Estate

- JLL Q1 2026: India's office market recorded 21.5 million sq. ft. leased, the highest ever for any first quarter, with GCCs commanding 45.5% of demand.



Section 1

India’s GCC Ecosystem

Scale, Maturity & Structural Shift

1.1 The Landscape in Numbers, 2026E Benchmark

MOAR Advisory’s synthesis of the latest industry benchmarks establishes a definitive current-state picture: 2,117 GCCs operating across India, with 1,025 new units and 510 new company entries added in the most recent measurement cycle. Market revenue stands at \$98.4 billion, with an AI and ML talent base exceeding 700,000 professionals in India, a concentration of advanced technical capability no competing geography can match at comparable scale.

Metric	2026E Benchmark	Trend
Total GCCs in India	2,117	510 new entries latest cycle
GCC Market Revenue	\$98.4 billion	Up from ~\$64.6B (FY2024)
Total Workforce	2.36 million professionals	150K–200K net added annually
AI/ML Talent Base	700,000+	Fastest-growing segment
US Company Share	~63% of GCCs	Dominant; Europe accelerating
Mid-Market GCCs	583 centers, 26% of total	PE-backed growth rising
New Sectors Entering	Clinical intelligence, luxury, sports	GCC model now sector-agnostic
Office Space Leased (Q1 2026)	21.5 million sq. ft.	Highest ever Q1; GCCs = 45.5% share
GCC Revenue Target (2030)	\$110–130 billion	AI + ER&D + product mandates

Note: E indicates – Estimates



Expansion is no longer cyclical; it is increasingly a long-term strategic shift toward India as a determinant of global capability.”

MOAR Research 2026

1.2 From Cost Arbitrage to Innovation Arbitrage

The defining strategic reframing of the past 24 months is the displacement of cost arbitrage as the organising logic of GCC value. India’s honest position in the global AI stack: Indian IT services majors, TCS, Infosys, Wipro, HCL, have grown at 3–5% CAGR for two consecutive years, the lowest in two decades. Their business model, headcount-based billing for repeatable service delivery, is structurally threatened by AI. This is not a verdict against India. It is the closing of one chapter and the opening of a more consequential one.

Layer	Companies (excluding Chinese companies)	India’s Position
Software Frontrunners	OpenAI, Anthropic, Google, Microsoft, Amazon, Meta, xAI	India = #2 Claude market globally (Anthropic 2026)
Hardware Designers	NVIDIA, AMD, Qualcomm, Micron, Intel	Designed in US, India is buyer and deployer
Semiconductor Manufacturer	TSMC (Taiwan), sole producer of cutting-edge chips	Critical geopolitical dependency; 2026 orders sold out
Memory Manufacturers	Samsung, SK Hynix, 70%+ of DRAM	DRAM prices up 50%+ in 2025
Machine Provider	ASML (Netherlands), sole EUV lithography maker	Every advanced chip requires ASML

India's Opportunity Thesis

- India will not build the next OpenAI or the next NVIDIA. That is not India's role in the AI stack.
- India will be the world's primary AI deployment, customisation, and talent engine, integrating AI models into enterprise workflows at a scale and speed no other geography can match.
- India ranks 3rd in Stanford's Global AI Vibrancy Ranking, leads globally in AI talent acquisition at ~33% annually, and contributes 19.9% of all global GitHub AI projects.
- The 2,117 GCCs employing 2.36 million professionals are embedded in the operations of 2 in 3 Fortune 500 companies.
- India's AI market is projected to reach \$131.31 billion by 2032 at a 42.2% CAGR (Government of India / CCI, Feb 2026).

1.3 Geographic Architecture, Bengaluru, Hyderabad & the Tier-2 Frontier

India's GCC geography is evolving from a twin-hub model toward a distributed multi-city ecosystem.

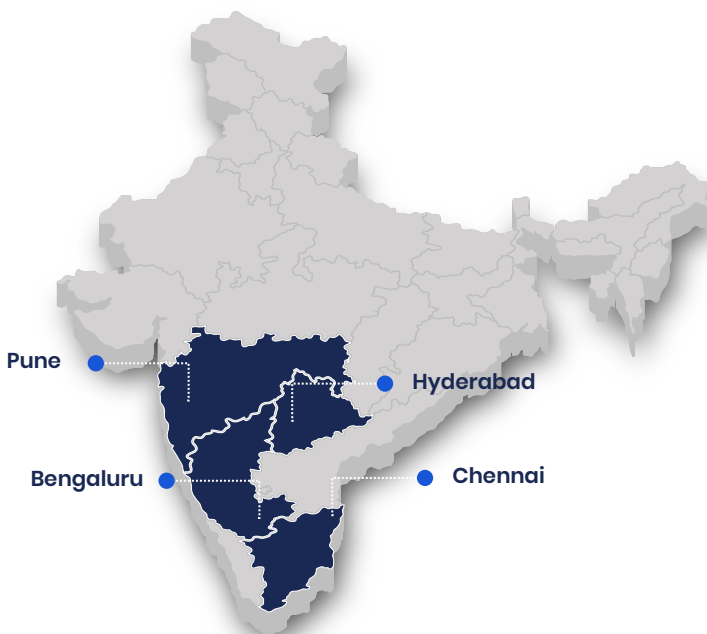
Bengaluru hosts the deepest concentration of AI and engineering talent, with 11% of India's AI job listings and 880+ centers, commanding a 33% share of all leasing activity by foreign occupiers in Q1 2026.

Hyderabad (355+ centers, 9.57% AI job share) has built powerful AI infrastructure momentum through government-backed initiatives.

Pune leads manufacturing and BFSI mandates (6.95% AI jobs).

Chennai anchors automotive and retail GCCs (6.62% AI jobs).

The Tier-2 frontier, Indore, Coimbatore, Jaipur, Nagpur, Ahmedabad, Kochi, represents the next phase of strategic diversification, offering 20–35% lower operational costs, attrition rates 10–12 percentage points below Tier-1, and access to motivated talent pools with substantially less competitive noise. Approximately 39% of the GCC workforce is projected to be in Tier-2 and Tier-3 cities by 2030.



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Section 2

Emerging Talent Trends &
Workforce Dynamics

2.1 The Talent Economy Has Recalibrated

The GCC talent market of 2025 operates under a fundamentally different logic. GCC hiring grew 18–27% in 2025, with GCCs accounting for approximately 20–25% of India’s total tech hiring. Net job addition runs at 150,000–200,000 annually. AI-related job postings in South Asia more than doubled from 2.9% to 6.5% of all vacancies between January 2023 and March 2025 (PIB India AI Report, Feb 2026). AI skills demand is growing 75% faster than non-AI roles. Globally, AI-related skills now appear in 2.5% of all US job postings, a 297% increase over the past decade (Stanford 2026).

18–27%
GCC Hiring Growth
Rate 2025

20–25%
Share of India’s
Total Tech Hiring

150–200K
Net Annual GCC
Job Addition

2.2 Attrition, A Structural Advantage

GCC attrition is structurally below the broader Indian IT market, one of the sector’s most powerful competitive differentiators.

Segment	Attrition Rate	vs Benchmark
GCC Sector, Overall (2025)	12–14%	Below IT services average
IT Services Companies	13–16%	Structurally higher than GCCs
India Inc. Average	~17%	Highest across segments
GCC, Tech / AI Roles	15–22%	Most contested
GCC, Analytics Roles	12–18%	Moderate pressure
GCC, Operations Roles	8–12%	Most stable
GCC Average Tenure	4–6 years	vs IT Services 2.5–4 years

2.3 Seniority-Level Attrition Profile

Level	Attrition Rate	Characteristic
Junior / Entry Level	18–25%	Highest, market competitive, AI exposure high
Mid-Level	10–15%	Moderate, career pivot risk
Senior / Leadership	5–8%	Lowest, mandate depth creates stickiness

2.4 Compensation, Premium, Long-Term Incentives & AI Differentials

GCCs maintain a consistent compensation premium of approximately 20% above equivalent IT services roles. High-demand AI and technology positions in Bengaluru command packages of ₹60 lakh to ₹1 crore and above. Projected average salary increments of 9.9% in 2025 reflect continued investment in retention.

The World Bank AI employment premium study found AI-focused roles command a 28% wage premium above average, versus 12% for general digital skills.

- 71% of GCCs now offer ESOPs, RSUs, and SARs, long-term wealth creation as a retention lever.
- AI/ML specialist premium: 32–47% above generalist in equivalent functional domains.
- BFSI and Software & Internet sectors lead projected increments: 10.4% and 10.2% respectively.
- Tier-2 expansion: 20–35% lower salary costs, 10–12% lower attrition, strategic advantage, not merely cost.

2.5 Offer Acceptance & Hiring Efficiency, The Friction Reality

Despite the sector's structural advantages, hiring conversion remains a significant operational challenge. MOAR Advisory's proprietary benchmarking documents an offer acceptance rate of 60–70%, implying a 30–40% decline or non-join rate.

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Metric	GCC	IT Services	Startups
Offer Acceptance Rate	60–70%	70–85%	40–60%
Time-to-Offer	2–4 weeks	3–5 weeks	1–2 weeks
Time-to-Join	45–90 days	30–60 days	2–4 weeks
Primary Drop Reason	Counter-offer + RTO	Counter-offer	Speed + culture

The AI Boomerang phenomenon, 2025’s Most Expensive Workforce Lesson

- 55% of executives report regretting replacing workers with AI, Forrester, December 2025.
- 29% of firms that cut staff due to AI integration have already reopened and rehired, Robert Half.
- MIT NANDA Report: 95% of GenAI projects had little to no measurable impact on profit and loss.
- Only 1% of leaders describe their organisation as mature in AI deployment, McKinsey State of AI 2025.
- Global tech layoffs 2025: ~240,000 across 783 events. India GCC-specific layoffs: ~6,000, a rounding error against 150K–200K annual net hiring.
- Net verdict: Layoffs represent role rationalisation, not sector contraction. The GCC remains a net job creation engine.

MOAR Advisory Perspective | Reducing Offer Attrition

- Pre-joining engagement programmes (structured touchpoints between offer and Day 1) reduce non-joining by 8–15%.
- Flexible notice period buyout policies are increasingly deployed by leading GCCs to compress time-to-join.
- Candidate experience from JD to onboarding is now a measurable competitive differentiator.
- RTO mandates without cultural justification are empirically linked to 5–15% directional decline in acceptance rates.
- 58% of GCCs take more than 45 days to fill critical roles, speed is now a talent brand signal.

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Section 3

AI & Automation

Redefining Roles, Skills & Value Chains

3.1 The Scale of the AI Revolution

The scale of capital commitment behind the AI revolution is without precedent in the history of technology. **US private AI investment reached \$285.9 billion in 2025**, up 127.5% year-over-year, with Generative AI alone growing over 200% and capturing nearly half of all private AI funding (Stanford HAI 2026).

Worldwide AI spending is projected at \$2.52 trillion in 2026, a 44% year-over-year increase (Gartner).

The US Stargate Project committed \$500 billion in infrastructure, the largest government AI pledge in history.

Hyperscaler capex alone totals \$650 billion in 2026: Amazon \$200B, Alphabet \$185B, Meta \$135B, Microsoft \$105B and others.

The CEO warnings of 2024, Dario Amodei (Anthropic) projecting 50% white-collar job elimination, Sam Altman (OpenAI) suggesting AI would replace most jobs, captured global headlines. Both reversed position in May 2026.

Anthropic raised \$65 billion in Series H funding at a \$965 billion post-money valuation and it confidentially submitted a draft S-1 registration statement with the SEC on June 1, 2026, giving the company the option to pursue an IPO after SEC review.

OpenAI's latest funding round valued the company at \$852 billion.

The reversal is instructive: even the architects of this revolution are discovering that the transition is more complex and more human than the headlines suggested.

\$285.9B

US Private AI Investment
2025, 23x China
(Stanford HAI 2026)

\$2.52T

Worldwide AI
Spending 2026
(Gartner)

900M+

ChatGPT Weekly Active
Users (OpenAI, March
2026)

The historical parallel is precise. In 2000–2001, the dot-com bubble eliminated entire job categories while simultaneously creating the internet economy that now employs hundreds of millions globally. AI is following the same arc, with greater velocity. The IMF acknowledges that over longer horizons, workers will migrate across sectors and acquire new skills as jobs evolve. **Every major technology paradigm shift takes 5–15 years to redefine itself. AI is in year three to four.**

3.2 Where GCCs Stand Today

83% of GCCs are scaling GenAI deployments, while 58% have committed investment to Agentic AI. 44% of GCC professionals consider AI a core part of daily work. The management challenge has shifted; adoption has happened organically. The question is now how to scale and govern it responsibly.

3.3 The AI Continuum, Assist, Augment, Transform

The Anthropic Economic Index (January 2026, covering November 2025 usage) documents that 52% of Claude interactions are augmented, human-AI collaboration, versus 45% automated. The most common single task, modifying software to correct errors (6% of all Claude usage). Computer and mathematical tasks account for 34% of Claude.ai usage, reflecting GCC engineering workloads dominating AI adoption.

- Customer support productivity gains: 14–15% (Stanford HAI 2026).
- Software development productivity gains: 26% (Stanford HAI 2026).
- Marketing output gains: 73% (Stanford HAI 2026).
- 75% of enterprise workers reported improved output speed or quality (OpenAI enterprise data).
- Average AI ROI: \$2.60 per \$1 invested (Accenture 2025); 3.2x average ROI from scaled AI deployments in GCCs.
- GenAI tools boost productivity 14% overall; 34% for new or lower-skilled workers (PIB India AI, Feb 2026).

3.4 Role Redesign, What Is Actually Changing

Approximately 27% of mid-level and 25% of junior tech roles are being actively reconfigured as AI copilots and automation tools become mainstream.

Stanford 2026 reveals a sharper signal: employment for software developers aged 22–25 has fallen nearly 20% from 2024, the youngest workers in the most exposed occupations are bearing the first wave of AI's labour market impact. One-third of organisations expect workforce reductions over the coming year, concentrated in service operations, supply chain, and software engineering.

The Anthropic Economic Index offers nuanced occupational analysis, travel agents experience deskilling as AI handles complex trip planning; property managers, by contrast, experience upskilling as AI automates bookkeeping, freeing capacity for contract negotiations. Not all AI displacement is equal, GCC workforce planners must model at the occupation level, not the sector level.

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New AI Roles Emerging Across GCCs

- Forward Deployed Engineers, deploying and customising AI systems at enterprise client sites.
- AI Deployment Engineers & Managers, orchestrating large-scale AI rollouts across functions.
- Data Centre Infrastructure roles, Amazon's \$200B capex for 2026 represents the largest infrastructure hiring wave in history.
- Agentic AI Orchestrators, managing multi-agent workflows: 2.3M agentic GitHub pull requests in March 2026, up 28x in 10 months.
- AI Governance Officers, regulatory compliance for EU AI Act, India DPDPA, and Colorado AI Act obligations.

3.5 The AI Governance Imperative

The pace of AI adoption has structurally outrun organisational readiness to govern it. Only 12% of GCCs have mature AI governance in place, while 78% plan significant AI investment in 2026. Enterprise GenAI project failure rates run at 70–85% across analyst consensus. The ICONIQ State of AI survey of 300 AI company executives reveals the hierarchy of deployment anxiety. 39% cite hallucinations as their number one challenge. 38% worry about explainability and trust. 34% struggle to prove ROI.

The shadow AI risk compounds the governance gap, 73.8% of workplace ChatGPT use flows through personal accounts, not enterprise versions, bypassing security, compliance, and data privacy controls entirely.

The regulatory timeline is compressing: EU AI Act major obligations begin applying August 2026. Colorado AI Act is in force from February 2027, India's Digital Personal Data Protection Act creates compliance urgency for GCCs processing citizen data.

MOAR Advisory Perspective | The AI Reliability Paradox

- AI is powerful for repetitive tasks and code generation but cannot yet be fully trusted for enterprise-grade accountability in most complex workflows.
- The AI Boomerang companies found accountability gaps, hallucination risks, and missing human judgment are real operational constraints, not temporary limitations.
- Our position: AI is a force multiplier, not a workforce replacement, in the current maturity phase.
- GCCs that build governance frameworks now will earn the most consequential global mandates later, trust is a lagging indicator of responsible deployment.

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Section 4

Upskilling, Reskilling & Leadership Development

4.1 The Global Reskilling Imperative

The World Economic Forum's Future of Jobs Report 2025, drawing on over 1,000 employers representing 14 million workers across 55 economies, establishes the macro frame. By 2030, 39% of workers' core skills are expected to be transformed or rendered obsolete. Skill gaps are cited by 63% of employers globally as the primary barrier to business transformation, the single most significant obstacle across 52 of 55 economies surveyed.

39%

Core skills transformed/obsolete by 2030 (WEF 2025)

63%

Employers citing skill gaps as #1 barrier to transformation

85%

Employers planning workforce upskilling (WEF 2025)

The Forrester AI readiness index adds operational precision:
only 16% of individual workers had high AI readiness (AIQ) in 2025.

Projected to reach just 25% in 2026.

Gen Z leads at 22% AIQ.

Baby Boomers at 6%.

Only 23% of AI decision-makers offered prompt engineering training in 2025, employees are largely teaching themselves.

ServiceNow-Pearson projects that Agentic AI will redefine 10.35 million roles in India by 2030 while creating 3 million net new technology jobs.

4.2 GCC Reskilling Architecture, What Is Being Built

India's GCCs have responded with significant investment in internal reskilling infrastructure. Reskilling initiatives operating across 71% of GCCs, with 78% investing in AI, cybersecurity, cloud, and platform engineering training.

The government's IndiaAI FutureSkills initiative supports 500 PhD scholars, 5,000 postgraduates and 8,000 undergraduates. SOAR (Skilling for AI Readiness) has enrolled 1.34 lakh students and teachers in partnership with Microsoft, HCL Technologies, and NASSCOM. FutureSkills Prime has reached 25.3 lakh registered learners.

GCC Reskilling Investment, Leading Architecture Patterns

- Continuous learning ecosystems: AI-personalised learning pathways embedded in daily work, not episodic training events.
- University co-design partnerships: Curricula built jointly with engineering colleges to deliver AI/cloud-ready graduates.
- Internal talent marketplaces: Platform-enabled matching of employees to emerging roles across functions and geographies.
- Leadership academies: Multi-month programmes building strategic agility, emotional intelligence, and executive presence.
- Skill-linked career architecture: Reskilling completion tied explicitly to promotion eligibility and compensation progression.
- Anthropic Economic Index: Education tasks grew from 9% to 15% of all Claude conversations, AI itself is becoming the reskilling tool.

4.3 Leadership at Global Scale, India's Rising Executive Class

The most under-appreciated transformation in India's GCC ecosystem is the emergence of a genuinely global leadership class operating from Indian cities.

Global leadership roles from India growing at approximately 40% CAGR over five years, reaching 6,500+ roles in 2024, including 1,050+ women leaders. The leadership pool is projected to surpass 30,000 globally influential roles by 2030.

Nearly two-thirds of Mega GCC heads today carry technical backgrounds and manage dual mandates simultaneously: running India operations while leading global portfolios in product, engineering or cybersecurity. When the India head is also the global head, the organisational logic has fundamentally changed.

Leading GCC leadership development architectures build three capability clusters that technical training alone cannot develop:

Strategic agility (making consequential decisions under uncertainty). Emotional intelligence (leading distributed, multigenerational cross-cultural teams). Executive presence (commanding influence in global stakeholder conversations from Bengaluru or Hyderabad).

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Section 5

Culture Transformation & Employee Experience

5.1 Culture as Competitive Moat

Culture is the invisible infrastructure of GCC performance and in the AI era, it requires more intentional design than at any prior point in the sector's history.

The Employee Value Proposition has structurally shifted: innovation culture (cited by 61% of GCC leaders) and career development (61%) now rank above compensation as the primary drivers of talent attraction and retention. GCCs competing primarily on pay are fighting the wrong battle.

Stanford HAI 2026 documents a meaningful public opinion shift: 59% of global respondents now say AI benefits outweigh the drawbacks, up from 55% in 2024. This rising public confidence is creating cultural permission for deeper AI integration, but 52% of GCC employees are actively exploring new opportunities at any given time, signalling that engagement cannot be assumed even in a low-attrition market.

5.2 Hybrid Work, From Response to Strategy

95% of GCCs have adopted hybrid work as a permanent organisational model. 63% of employees are willing to accept lower compensation in exchange for greater hybrid flexibility, making flexibility a total compensation element with measurable financial equivalence. Over 60% of GCCs report measurable productivity and profitability gains from hybrid models, with sustained improvements of 12–20% compared to full office mandates.

Return-to-office mandates implemented without commensurate cultural justification have been linked to 5–15% directional declines in offer acceptance rates and measurable upticks in voluntary attrition among high-value talent.

95%

GCCs with permanent hybrid model (MOAR Research)

63%

Employees willing to trade pay for hybrid flexibility

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5.3 Gen Z & the Workforce of 2030

Gen Z is now the dominant entry-level cohort in India's GCC sector and their expectations represent a structural discontinuity from prior generational norms.

They seek impact over stability, purpose over title, and experimentation culture over process rigidity. India's BHASHINI initiative, leveraging AI for 36+ languages with 1 million+ mobile app downloads, represents the cultural democratisation of AI that Gen Z GCC professionals are experiencing daily.

GCCs successfully engaging Gen Z are those that position employee s not merely as workers, but as culture carriers and innovation drivers. The gap between the EVP an organisation articulates and the one its employees experience is now visible, searchable, and viral. Employer brand is a product that Gen Z evaluates against global tech companies, funded startups, and consulting firms, simultaneously and in real time.

Section 6

GCCs as Innovation & Value-Creation Engines

6.1 The Innovation Mandate Is Now Structural

92% of GCC leaders affirm their centers now drive genuine innovation and enterprise-wide transformation, not just cost reduction, marking a structural shift in mandate rather than a PR reframing. This is backed by capital: digital transformation is the top priority for 61% of GCCs over the next 12 months, and India GCCs are projected to spend \$4.7 billion on AI by 2027. Stanford HAI 2026 pegs Generative AI's annual value to US consumers at \$172 billion by early 2026, up from \$112 billion, a leading indicator for enterprise returns still to come.

\$4.7B

Projected AI
Spend by India
GCCs by 2027

3.2x

Average ROI from
Scaled AI
Deployments

\$172B

Annual GenAI Consumer
Value, US Alone
(Stanford HAI 2026)

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6.2 Sector Innovation Profiles

- **BFSI:** BFSI GCCs: Deploying AI/ML for credit scoring, real-time fraud detection, regulatory compliance automation, and hyper-personalised advisory. 82% of BFSI respondents increased AI/ML investment, with 87% planning further increase.
- **Technology:** Technology GCCs (Bengaluru, Hyderabad): Driving end-to-end product engineering, agentic AI deployment, and global platform architecture. Fortune 500 AI workforces in India now exceed 126,000 dedicated AI-aligned professionals.
- **Healthcare & Life Sciences:** Healthcare & Life Sciences GCCs: Accelerating pharmaceutical research support, clinical trial analytics, and AI-powered diagnostic intelligence.
- **Manufacturing:** Manufacturing GCCs (Chennai, Pune): Building digital twin capabilities, automotive software systems for EV and ADAS development, and AI-driven supply chain optimisation.
- **Capital Markets:** Capital Markets GCCs: Deploying synthetic data generation, investment strategy modelling, settlement failure prediction and next-generation digital advisory platforms.
- **IT Services Pivot:** India IT Services (TCS, Infosys, Wipro, HCL): Revenue growth at 3–5% CAGR, the lowest in two decades.
The strategic imperative: pivot from back-office service provider to AI solutions integrator and managed AI services provider.

6.3 The Cognitive Intelligence Hub & the Jevons Paradox

The GCC maturity curve maps as:

Execution Center > Capability Center > Innovation Center > Cognitive Intelligence Hub.

By 2030, the most advanced GCCs are expected to have achieved **Cognitive Intelligence Hub status**, deeply integrating AI into their operating model, co-owning global IP with parent companies and leading enterprise-wide mandates from India.

The Jevons Paradox is essential to understanding why AI investment will continue to accelerate. First described by economist William Stanley Jevons in 1865, **the paradox states that increasing the efficiency of a resource leads to higher total consumption, not lower.**

When DeepSeek trained a frontier model for \$5.6 million versus OpenAI's \$100 million, Microsoft CEO Satya Nadella immediately cited Jevons, correctly predicting that **cheaper AI would expand, not reduce, demand.**

Per-token inference costs have dropped approximately 1,000x since 2021 (\$60 to \$0.06 per million tokens), yet average enterprise AI budgets grew from \$1.2 million per year in 2024 to \$7 million in 2026.

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MOAR Advisory Perspective | The Jevons Paradox in GCC AI

- **Efficiency Gain:** AI tools become cheaper and more capable, GCCs deploy more of them across more workflows.
- **Demand Explosion:** Lower cost unlocks new use cases, compute bills grow faster than efficiency savings.
- **The Triple Bind:** Cheaper AI > deploy more > compute bills grow > pressure to cut headcount > lose humans needed to govern AI > capability gap widens.
- **The evidence:** Average enterprise AI budget \$1.2M (2024) to \$7M (2026) despite per-token costs dropping 1,000x.
- **Memory/hardware pricing compounds this:** DRAM up ~50% in 2025; enterprise SSDs up 53–58% in Q1 2026.

Section 7

Workforce Planning, Hybrid Models & Organisational Agility

7.1 From Headcount Planning to Skills Architecture

The traditional GCC workforce planning model, headcount expansion driven by functional scope, optimised against cost-per-seat targets, is structurally inadequate for the AI era. Organisations building enduring advantage are transitioning to skills-based workforce architectures: treating human capabilities as dynamic portfolios to be actively managed, grown, redeployed, and partially substituted through automation.

MOAR Advisory's four-dimensional workforce planning framework, Build, Buy, Borrow, Bot, provides the operative structure:

- **Build:** internal reskilling and career transition programmes.
- **Buy:** targeted external hiring of niche AI, cybersecurity and domain-led skills.
- **Borrow:** strategic partnerships, gig talent, academic co-creation.
- **Bot:** AI agents and automation deployed to handle structured task categories, freeing human capacity for higher-order work.

McKinsey estimates up to 30% of work hours could be automated by 2030, the Bot dimension is an active planning variable today, not a future consideration.

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7.2 Workforce Analytics as Operating Infrastructure

71% of GCCs now leverage AI and analytics to personalise rewards, conduct real-time pay equity audits, optimise benefits portfolios, and build agile talent acquisition pipelines. The shift is from retrospective HR analytics to prospective workforce intelligence, predicting skill decay, identifying internal mobility opportunities before external exits occur and benchmarking compensation continuously rather than annually.

The shadow AI risk demands inclusion in workforce planning: 73.8% of workplace ChatGPT usage flows through personal accounts, not enterprise versions, representing a material governance, security, IP risk that most GCC workforce plans do not yet formally address. As AI governance regulation tightens, the gap between policy and practice will become a compliance liability.

7.3 Organisational Agility, The Structural Differentiator

GCCs that will outperform over the 2025–2030 period are those that have built organisational agility into their operating DNA, not as a crisis response, but as a permanent structural capability. Boards are mandating AI strategies as a fiduciary responsibility, demanding measurable outcomes within 12–18 months. Over 70% of AI initiatives stall at the pilot stage, the challenge has decisively shifted from experimentation to industrialisation.

Agility encompasses three interdependent dimensions:

Strategic agility (rapidly realigning center mandates with evolving enterprise priorities). **Talent agility** (fluidly redeploying skills across functions, geographies, and AI-human configurations).

Cultural agility (sustaining operational discipline and innovation ambition simultaneously). Practically, this means flatter hierarchies, shorter planning horizons, internal mobility platforms, and leadership KPIs that reward adaptability as explicitly as execution.

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Section 8

Industry Benchmarks, Market Trends & Outlook to 2030

8.1 The 2030 Horizon, A Quantitative View

Strategic Indicator	2026E Baseline	2030 Projection	Source
GCC Count in India	2,117	2,500+	MOAR Research
GCC Market Revenue	\$98.4B	\$110–130B	MOAR Research
GCC Workforce	2.36 million	3.46 million	MOAR Research
AI/ML Talent Base	700,000+	3,000,000+	MOAR Research
India AI Market	\$7.63B (2024)	\$131.31B (42.2% CAGR by 2032)	PIB India AI, 2026
Global Leadership Roles, India	6,500+(2024)	30,000+	MOAR Research
Agentic AI Impact (India)	–	10.35M roles redefined	ServiceNow–Pearson 2025
Net New Tech Jobs Created	–	3 million	ServiceNow–Pearson 2025
Tier-2/3 City Workforce Share	~15–20%	~39%	MOAR Research
Worldwide AI Spending	\$1.76T+ (2025)	\$2.52T+ (2026)	Gartner 2026
India Stanford AI Vibrancy Rank	3rd	Consolidating top 3	Stanford HAI 2026

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8.2 Structural Tailwinds Sustaining India's Position

Several structural forces will sustain India's GCC growth trajectory through 2030.

India's AI foundations are validated across multiple global indices as of June 2026:

- 3rd in Stanford's Global AI Vibrancy Ranking.
- IMF AI Preparedness Index score of 49.3 versus 42.1 average for other emerging economies.
- 27th in Oxford's Government AI Readiness Index, leading South and Central Asia.
- India's demographic dividend: 65% of the population under 35, 3M+ STEM graduates annually.
- Over 1 billion internet connections and 400M+ 5G subscribers, structural advantages no competing geography can replicate within the planning horizon.

The financial infrastructure for India's AI future is being built at speed: 38,000 GPUs acquired, 100PB data centre storage capacity, 27 IndiaAI Data and AI Labs established in Tier-2 and Tier-3 cities.

Anthropic's IPO filed June 2026 at a \$965 billion valuation following a \$65 billion Series H represents the financial permanence of the AI era. These are not venture bets. They are public market convictions that the AI infrastructure wave has decades, not years, to run.

China's open-source AI emergence, led by DeepSeek, is a structural tailwind for India despite being a competitive threat to US AI companies. Cheaper, more accessible foundation models lower the barrier for Indian GCCs to deploy AI, reducing dependency on expensive proprietary API costs while expanding the use case universe.

The Jevons Paradox predicts the outcome:

cheaper AI will expand total Indian GCC AI deployment, not reduce it.

8.3 Strategic Priorities for GCC Leaders, 2026 Action Agenda

The following eight priorities will separate high-performing GCCs from the rest of the field:

- Anchor planning on updated benchmarks. The figures of 2,117 GCCs, \$98.4B revenue, and 2.36M workforce are the current operative baseline. Planning against prior-year metrics carries direct consequences for talent, real estate, and capability investment.
- Build AI governance before scaling AI deployment. Only 12% of GCCs have mature AI governance. The organisations that build trust frameworks proactively will earn the most consequential global mandates. Governance is a competitive asset.

- Plan AI economics over 3–5 year horizons, not annual cycles. The Jevons Paradox guarantees that efficiency gains will be consumed by expanded demand. Budget for compute infrastructure as a capital investment.
 - Invest in leadership depth as aggressively as technical capability. The GCC that produces global leaders commands the highest strategic mandate and the most durable institutional position.
 - Design the EVP for the next generation. Purpose, innovation culture, career velocity, and psychological safety are the currencies of talent in 2025 and beyond.
- Treat geographic diversification as talent resilience, not cost optimisation. Tier-2 expansion provides structural buffers against Tier-1 market volatility.
 - Measure and communicate innovation outcomes. IP generated, products launched, global problems originated. The narrative of the GCC as a cost centre must be actively replaced by evidence of innovation value.
 - Solve the AI Boomerang before it happens. Build reskilling architectures, governance frameworks, and human-AI collaboration models before the pressure to cut headcount arrives.



The GCC model is moving from support function to enterprise nerve centre. This is no longer a directional ambition; it is a structural reality for organisations that have moved with conviction. India is not where work gets done. India is becoming where world-changing work begins.

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Conclusion | The Workforce Reset as Strategic Inflection

The GCC Workforce Reset is not a challenge to be managed, it is an inflection point to be led. The convergence of AI adoption at scale, structural talent market recalibration, cultural transformation, and a definitively elevated innovation mandate represent the most consequential upward revaluation of GCC strategic worth in the sector's history.

The historical parallel is instructive without being deterministic. In 2000–2001, the dot-com bubble wiped out entire job categories and destroyed billions in capital. It also gave us the internet economy, the smartphone, and the digital infrastructure that now employs hundreds of millions globally. **The temporary disruption created a permanent upgrade. AI is following the same arc, with greater velocity and broader reach.** Every technology paradigm shift takes 5–15 years to redefine itself. We are in year three to four. What makes this moment different for GCCs is not the technology itself, it is the simultaneity of the pressure. AI is reshaping work content, hybrid models are restructuring work location and generational expectations are redefining work meaning. All three are changing at once.

No single policy framework, reskilling programme or governance structure adequately addresses all three.

What is required is a culture architecture, deliberately designed, continuously maintained, and visibly led from the top of the organisation.

The 2,117 GCCs operating in India today collectively employ 2.36 million professionals and generate \$98.4 billion in economic value. They are, in aggregate, one of the most consequential workforce ecosystems in the world. The question is not whether India's GCCs will continue to grow. The question is which organisations will lead that growth, architecting the workforce of 2030 with the strategic conviction and human commitment that the moment demands.

The GCC Workforce Reset has already begun. The strategic choice that remains is whether your organisation is architecting it or adapting to it.

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About MOAR Advisory Solutions

Who We Are

MOAR Advisory Solutions Private Limited (“MOAR Advisory”) is a boutique GCC Advisory firm that helps global enterprises building and scaling their India capability centres. Our Research & Talent Intelligence Practice combines deep GCC ecosystem expertise with institutional-grade research rigour, integrating proprietary primary data with synthesis across 20+ industry benchmarks.

Service	Description
Talent Acquisition & workforce solutions (M-Select)	Executive & Leadership Search, Talent Mapping & Intelligence, Recruitment Process Outsourcing, Candidate Assessment & Selection, Candidate Experience Management, and Workforce Planning & Advisory, delivering end-to-end talent acquisition solutions to help enterprises attract, assess, and build high-performing GCC teams.
Compliance Setup and Finance	Legal Entity Setup, Compliance & Regulations, Finance & Accounting Setup, Tax Advisory & Strategy, Banking & Treasury, Procurement as a Service, Technology & Tools Enablement, and Ongoing Operational Support delivering end-to-end company setup solutions to help enterprises establish and scale GCCs with speed, compliance, and operational excellence.
People Advisory	Talent Strategy & Management, Organization Design & Development, Total Rewards & Policy Design, Employee Engagement & Culture Infusion, Change Management & Fractional HR Support, and end-to-end advisory across the hire-to-retire people lifecycle, helping enterprises build people-first organisations that drive growth, engagement, and long-term success.
Employer Branding & Communications (M-Power)	Employer Branding & EVP, Internal Communications, Social Media & Content, Media & PR Management, Executive Visibility, and Events, Engagement & Culture Campaigns delivering integrated employer branding and communications strategies that strengthen reputation, attract top talent, and enhance employee engagement.

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Service	Description
Finance & Compliance	Finance Organization Design & Structuring, Global Consolidation & HQ Alignment, Tax Advisory, Audits & Certifications, Procurement & Vendor Management, and Legal & Contract Management delivering comprehensive finance and compliance solutions that ensure operational efficiency, regulatory compliance, and scalable business growth.
Agentic AI	AI Readiness Assessment & Deployment Roadmap, Use-Case Prioritisation & Platform Selection, and AI Agent Governance & Human-in-the-Loop Design enabling enterprises to adopt Agentic AI responsibly through strategic planning, scalable implementation, and effective governance.
Digital Transformation	IT Ops Automation, Cybersecurity & Risk Management, Enterprise Architecture Solutions, Cloud Engineering & DevOps, Data Engineering & Management, and Automation & AI/GenAI Adoption driving end-to-end digital transformation through secure, scalable, and technology-led solutions that accelerate business growth and operational excellence.
Retail Tech & OPS	Digital Commerce Operations, AI-Powered Catalogue, PDP, Marketplace & Dropship Solutions, Store-Digital Integration, Returns & Reverse Logistics, Platform Integration (Commerce, OMS, ERP & CRM), Data & Analytics, and Automation & Customer Experience (CX) enabling retailers to deliver seamless omnichannel experiences, optimise operations, and accelerate digital growth.
Advisory	Feasibility Studies, Location Strategy & Site Selection, Leadership as a Service, Market Entry Advisory, Operating Model Design, and GCC Setup & Scale Support providing end-to-end advisory services that help enterprises establish, optimise, and scale Global Capability Centres with confidence.

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India is evolving from the world's back office to its innovation engine.

MOAR Advisory helps enterprises unlock this transformation through strategic GCCs.

AI and human talent together create unprecedented value, efficiency, and growth.

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