

Global Capability Centers *India as the preferred Destination*

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GCCs IN INDIA: ENHANCED RESILIENCE TO THE PANDEMIC

SOME KEY BUSINESS CHALLENGES DURING THE PANDEMIC



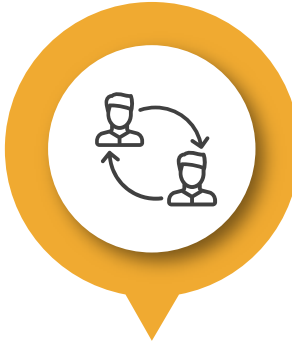
Business Continuity



Operational Efficiency



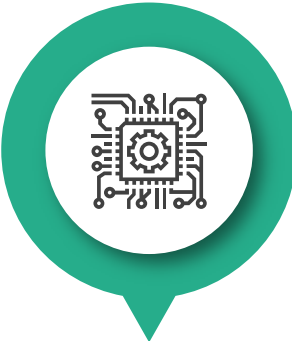
Cost Pressures



Virtual Team Management



Workforce Policies



Technology



Cybersecurity

HOW GCCs PERFORMED DURING THE PANDEMIC

80%

Had **no** operational impact

70%

Had **less than 8%** absenteeism

67%

Confident remote model will **continue**

60%

Reported **10%+** growth

54%

New businesses focused on **digital services** delivered out of GCCs

GLOBAL CAPABILITY CENTERS (GCCs) IN INDIA

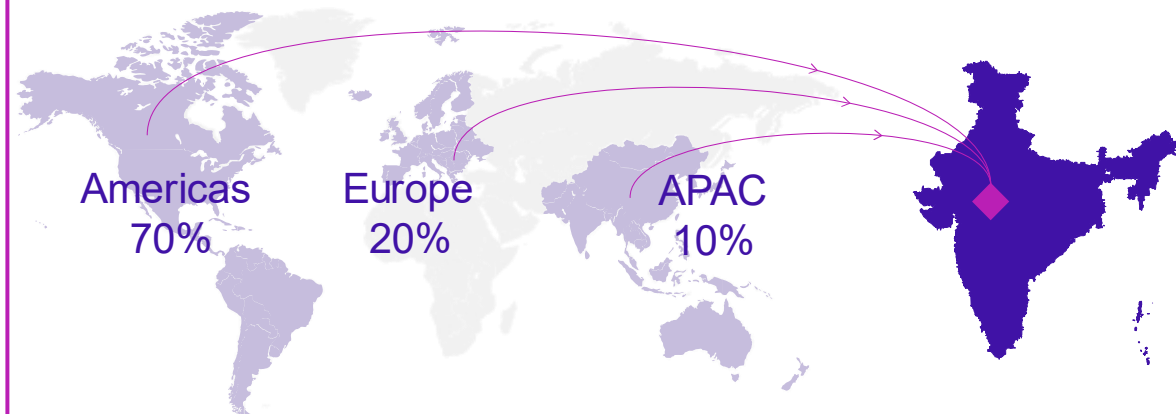


1,430+
GCCs



1+ M
employees

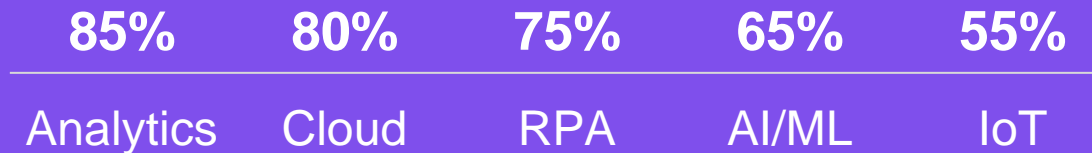
GCCs in India by Headquarter Locations



More than 1 out of 4 GCCs set up in 2020 were in India

180+ innovation centers of Fortune 500 companies

Investments in Key Digital Focus Areas



THE INDIA ADVANTAGE

Highly Skilled Talent

600 million+ manpower pool by 2025



Dedicated Infrastructure



Government Incentives

Deductions on scientific research



Rapid Digitization



Cost Savings

Up to 45% cost savings over 3-5 years



Cost Centers to Competency Centers



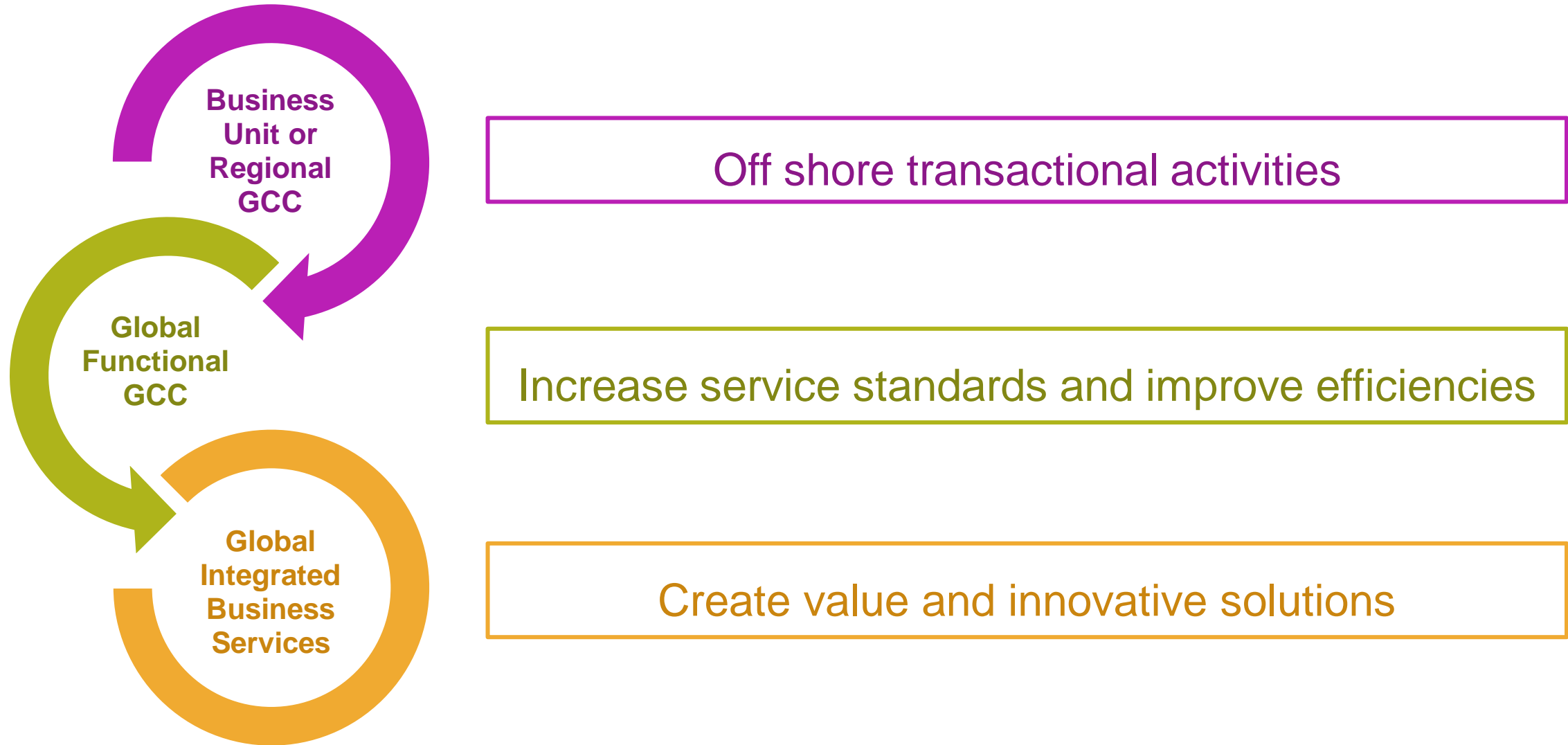
~250% increase in GCCs in 10 years

8 Global Unicorns with centers in India

Source: VARIOUS

A SNEAK PEAK INTO THE KEY OPERATING MODELS OF A GCC AND HOW TO BUILD CYBER RESILIENT OPERATIONS

JOURNEY OF A GCC



GCC OPERATING MODELS


Operating Models →



Captives
Build and Set up



**Build, Operate
and Transfer**



**Managed
Services**
Build, Operate, Govern

PARAMETERS

Set-up Time	↑ High	↓ Low	↓ Low
Investment	↑ High	↑ High	↓ Low
Risk	↓ Low	↓ Low	↑ High
Scalability	↓ Low	↓ Low	↑ High
Cost of ownership	↑ High	↑ High	↓ Low
Pricing	Cost Plus	Cost Plus Management Fee	Fixed Fee/FTE

PILLARS OF A CYBER RESILIENT GCC



CATALYZE TRANSFORMATIONS AND TAKE ADVANTAGE OF MULTI-FUNCTIONAL GCCs

INDIA BASED MULTI-FUNCTIONAL GCCs

- Finance & Accounting
- Contract Management
- Payroll
- Human Resource Management
- Procurement

Business
Process
Management



12%

Engineering R&D

10%



- Design
- Innovation
- Product Life Cycle Management
- Intellectual Property Management
- Others

IT Services



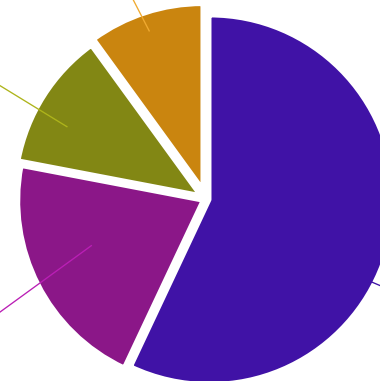
21%

- Application Development & Management
- Cyber Security Services
- Data Center Outsourcing
- Network Services and Service Desks

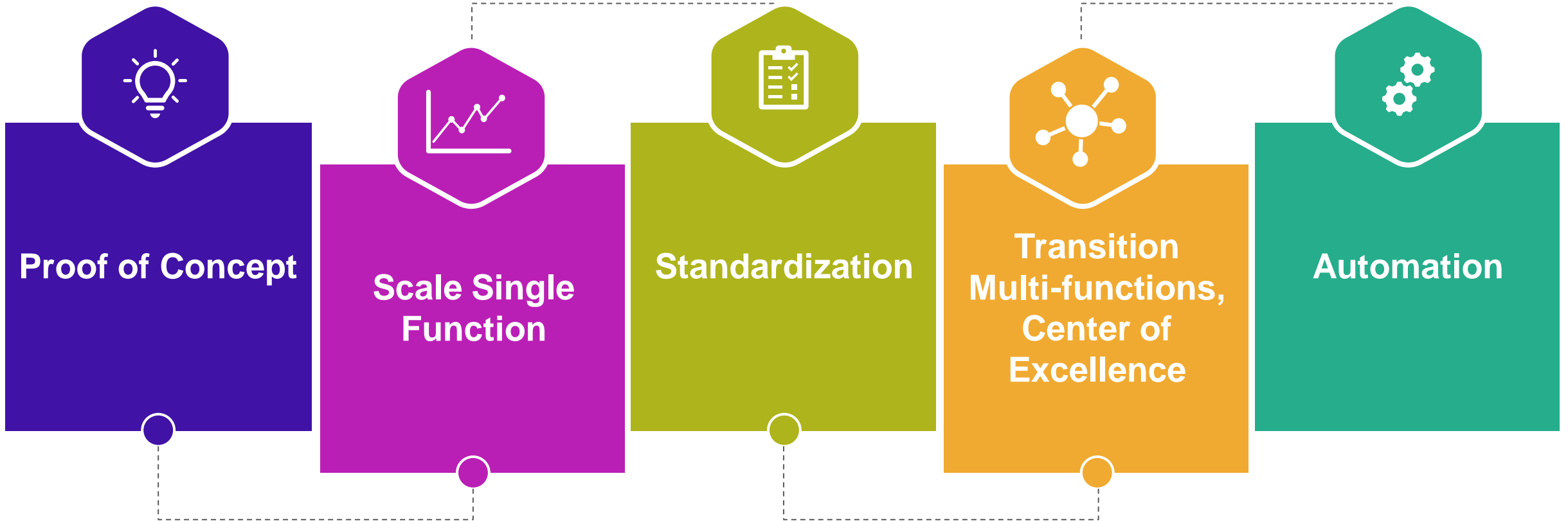
57%



Integrated



MULTI-FUNCTIONAL GCCs TRIGGER TRANSFORMATION



LEVERAGING MULTI-FUNCTIONAL GCCs



Supporting
Transformation



Skilled
Workforce



Future
Leaders



Management
Support



Strategic
Planning

ROLE OF TECHNOLOGY IN VIRTUAL MIGRATION, TRANSFORMATION, AND GOVERNANCE OF GCCs

TECHNOLOGY SUPPORT – SOME EXAMPLES

01

Migration



Workflows – for smooth and efficient management of the processes



Onboarding & Training – Scenario based assessment tools



Reconciliation Tool – helps in faster and more efficient month-end

02

Transformation



Customized Applications for very specific need of the business/process



BOT's/RPA – for automating the administrative and repetitive tasks



OCR/Intelligent OCR (AI/ML Enabled) – for eliminating key stroking of data

03

Governance



Data Visualization Tool – for real-time monitoring and reporting of SLA's and business insights



Project Management Tools

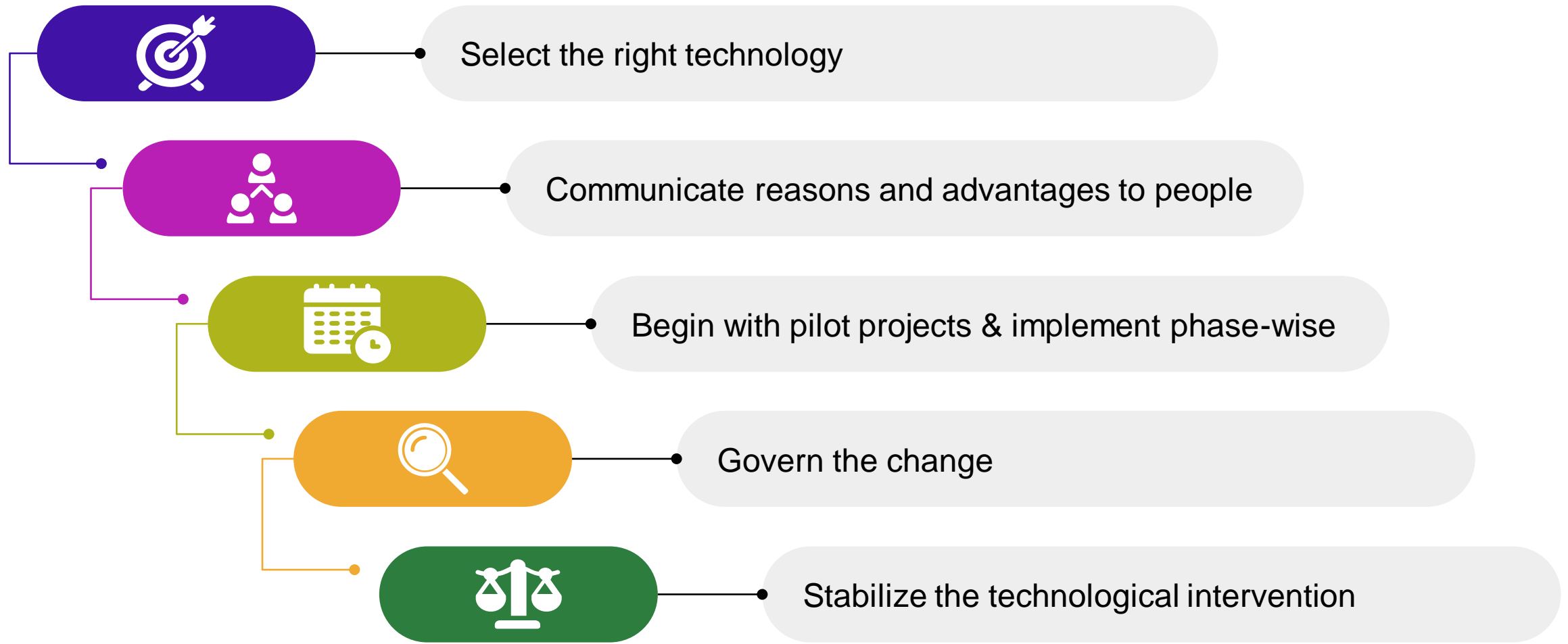


Cloud-Based Collaboration Apps

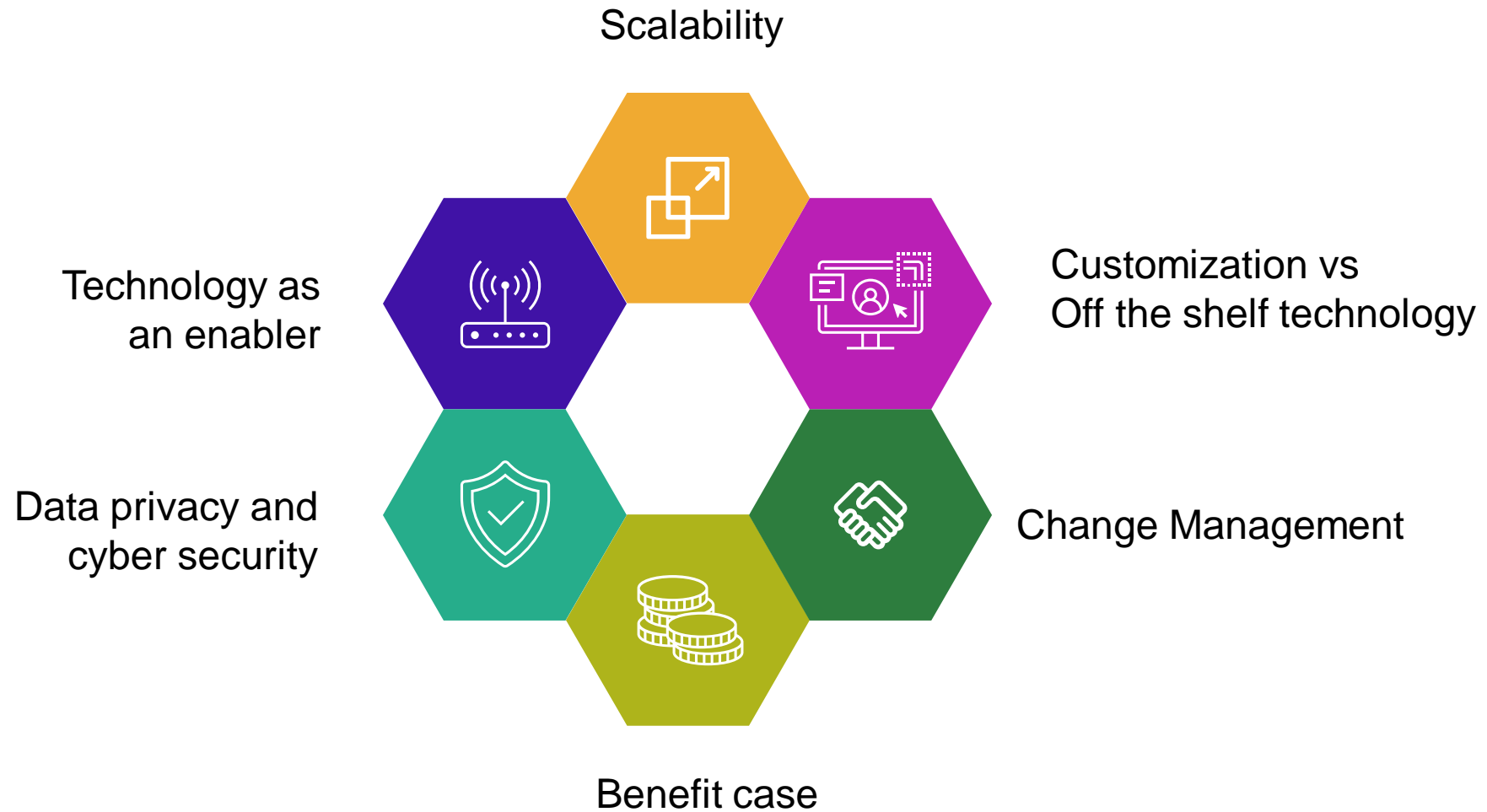
Communication tools

Data Storage and Retrieval

INTEGRATING TECHNOLOGY WITH PEOPLE



BEING RIGHT WITH TECHNOLOGY



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