

The GCC Playbook: What We're Seeing on the Ground

Strategic lessons and emerging patterns from HEX's recent GCC engagements.

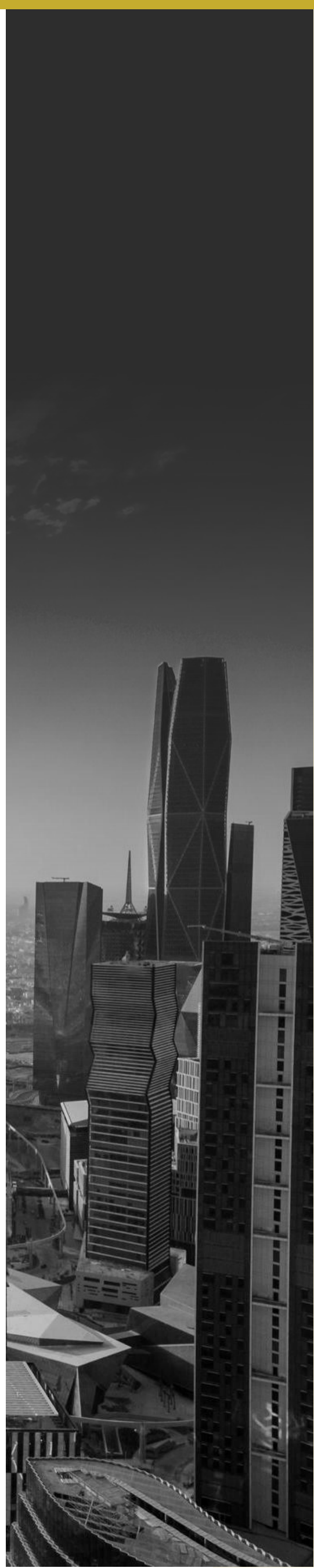


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Efficiently.



75% of new India GCCs are struggling to scale

Typical Challenges across
the GCC Lifecycle

Design and Setup

- / Contractual lock-in in BOT and JV type models

Scale

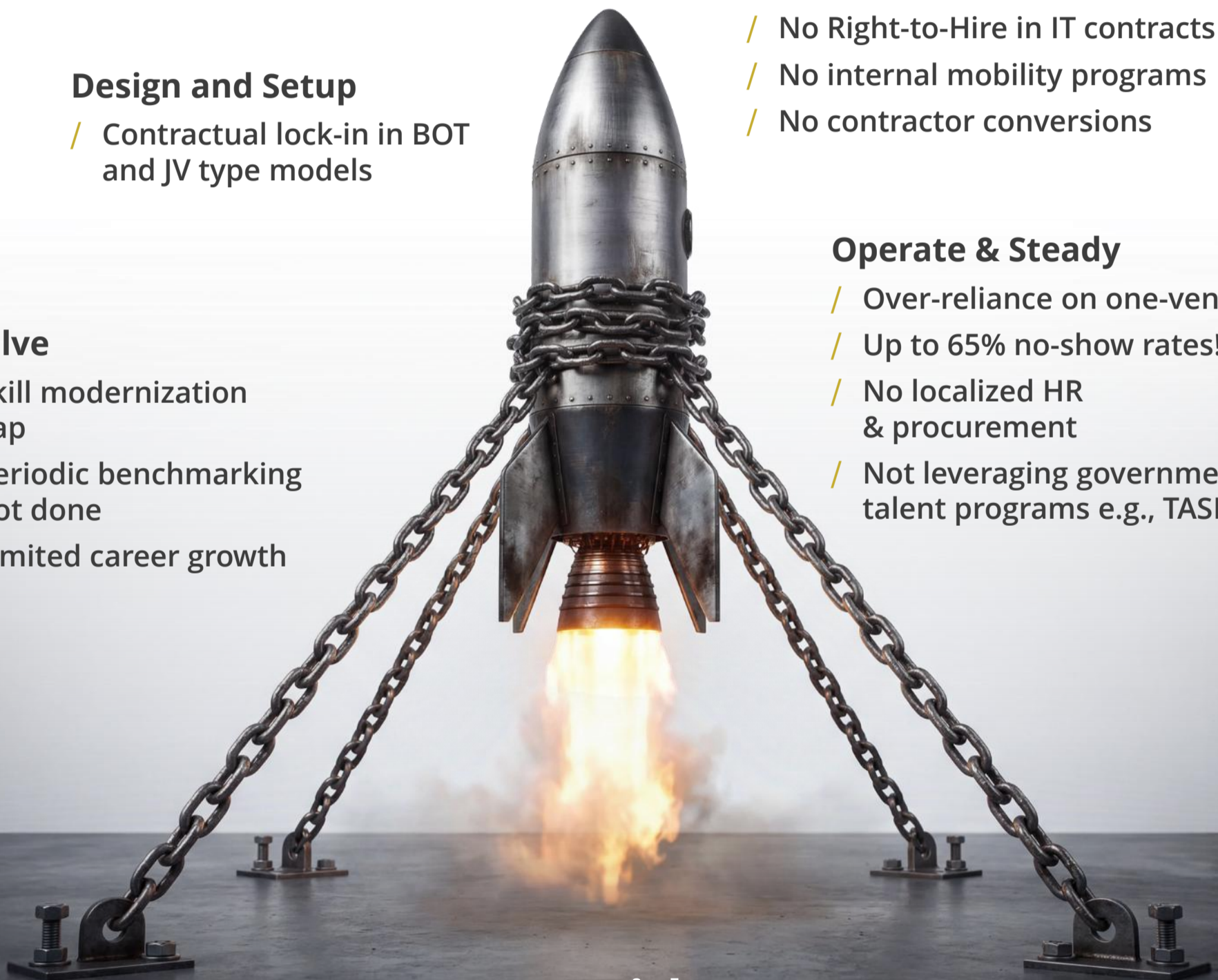
- / No Right-to-Hire in IT contracts
- / No internal mobility programs
- / No contractor conversions

Evolve

- / Skill modernization gap
- / Periodic benchmarking not done
- / Limited career growth

Operate & Steady

- / Over-reliance on one-vendor
- / Up to 65% no-show rates!
- / No localized HR & procurement
- / Not leveraging government talent programs e.g., TASK*



**Partner with HEX.
Move past challenges.**

“

All HEX-led
GCCs are **100%**
Self-funded

We extricate inefficiencies
and scope from the existing
portfolio to bootstrap GCCs
and ease EBITDA.

Sarthak Brahma

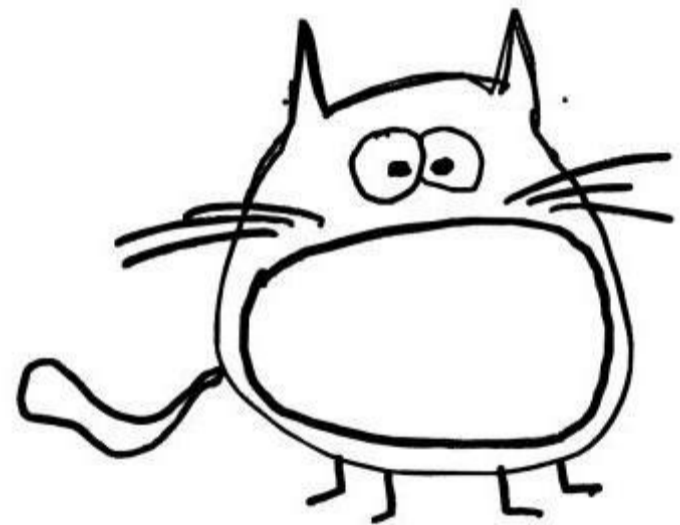
CEO, HEX Advisory Group

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**Trim the
Vendors.**



**Fatten the
GCC.**



Feeding the GCC a steady diet of 'Capacity'
does not make it a 'Capability' center.

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Not all **GCCs** being set-up are GCCs.

Some are GCCCs (Capacity Cleanup Centers).

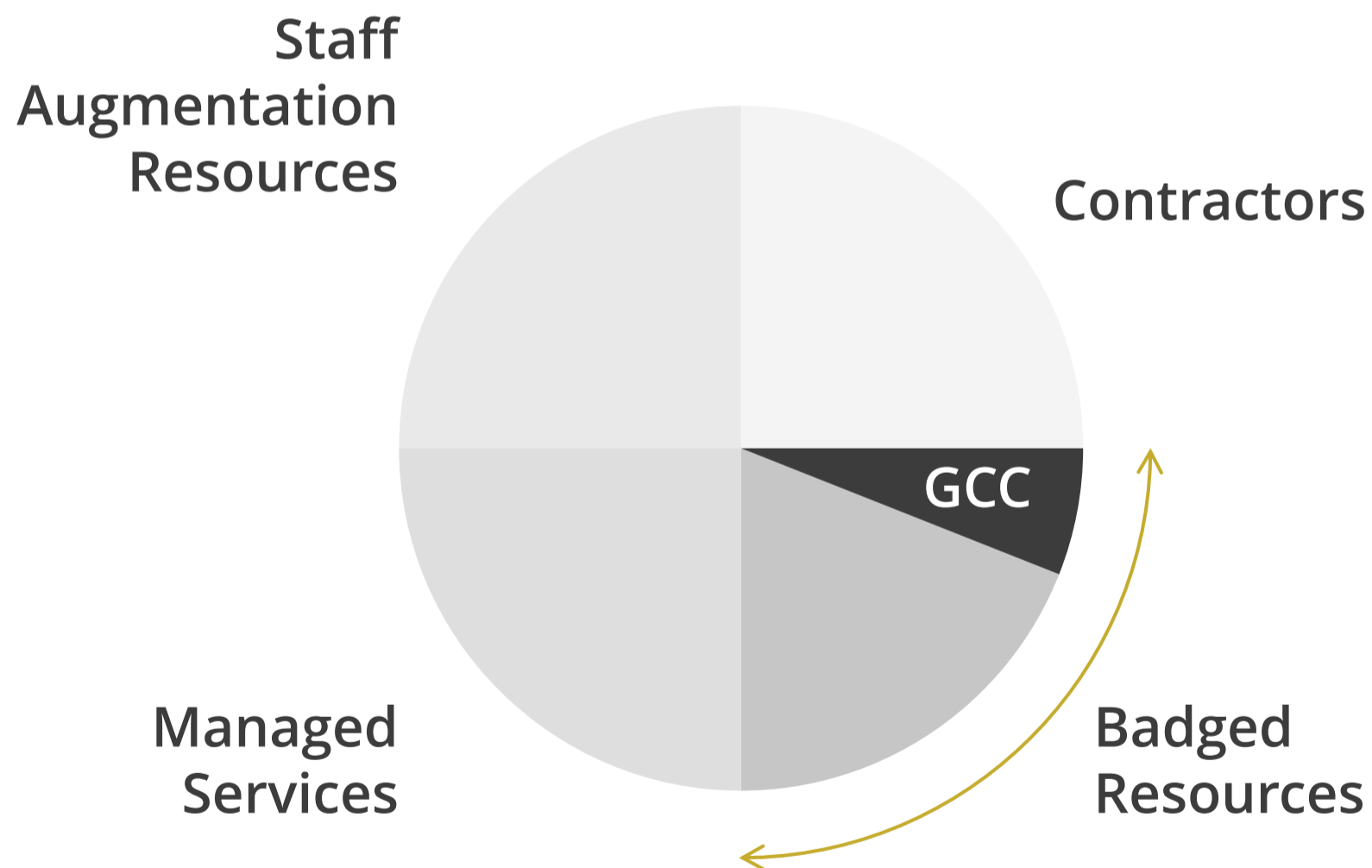
Sarthak Brahma

CEO, HEX Advisory Group

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GCC should **NOT** be a standalone initiative.

It **MUST** be integral to the overall
IT or BPS resource portfolio and
serve a clear and distinct need.



“

GCC is NOT a one-vendor utopia. It is an ecosystem that needs to be curated and stitched to serve the enterprise

Sarthak Brahma

CEO, HEX Advisory Group

”



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HEX advised GCCs
enjoy **Day 1 Talent & IP
Autonomy, ZERO Capex,**
and hyper-flexible vendor
contracts.

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Incumbency vendors can play a pivotal role in **GCCs**. But neither parties think beyond BOT (Build, Operate, Transfer), and that aint it!

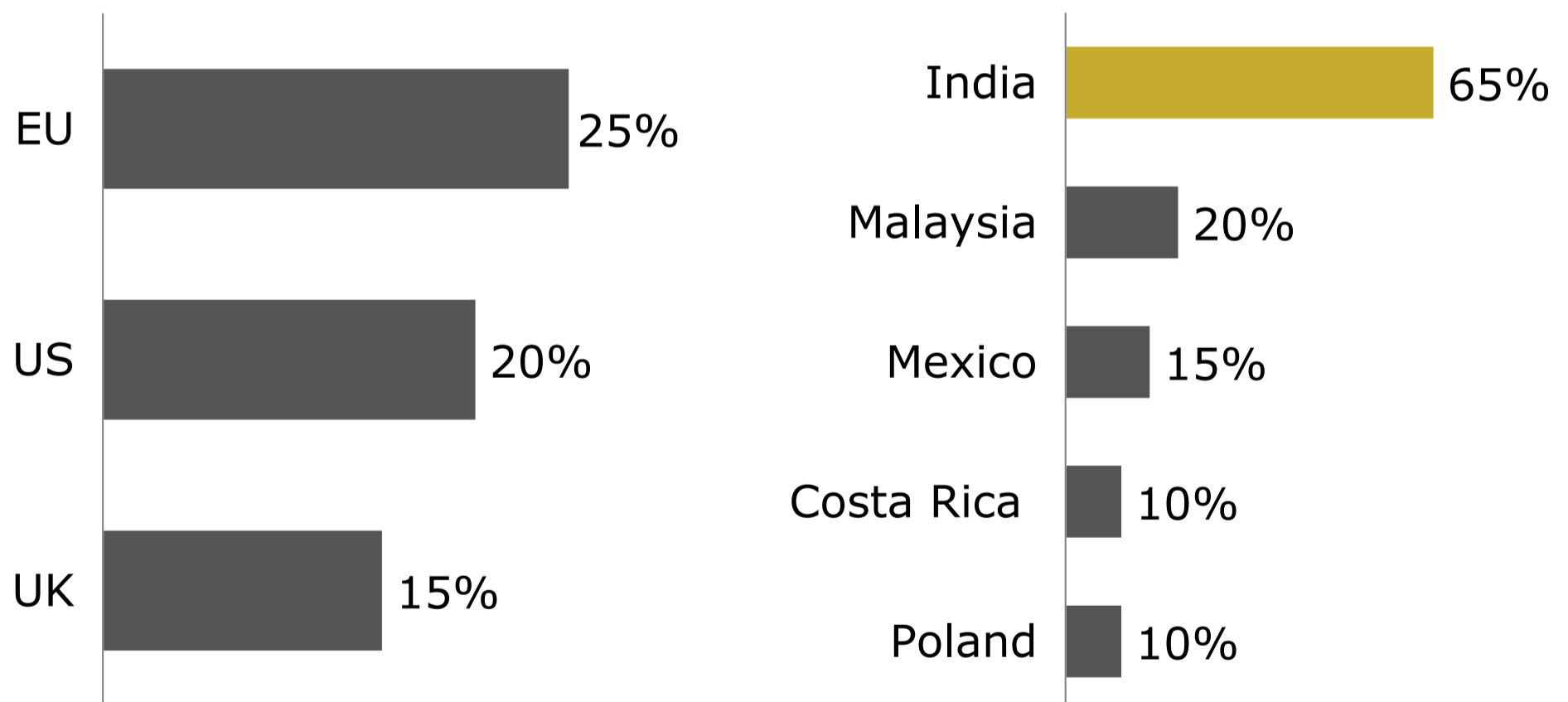
Sarthak Brahma

CEO, HEX Advisory Group

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Excruciating No-show rates are already clouding the India **GCC** sector

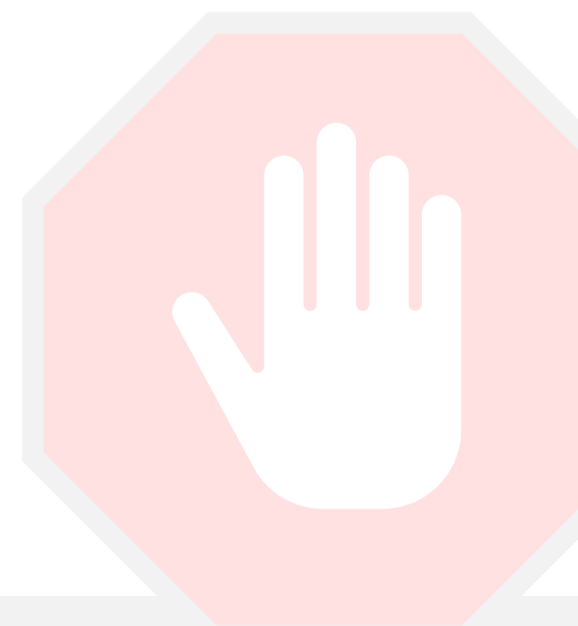
IT Hire No-show Rates by Country Parent and GCC No-show Rates, CY2024



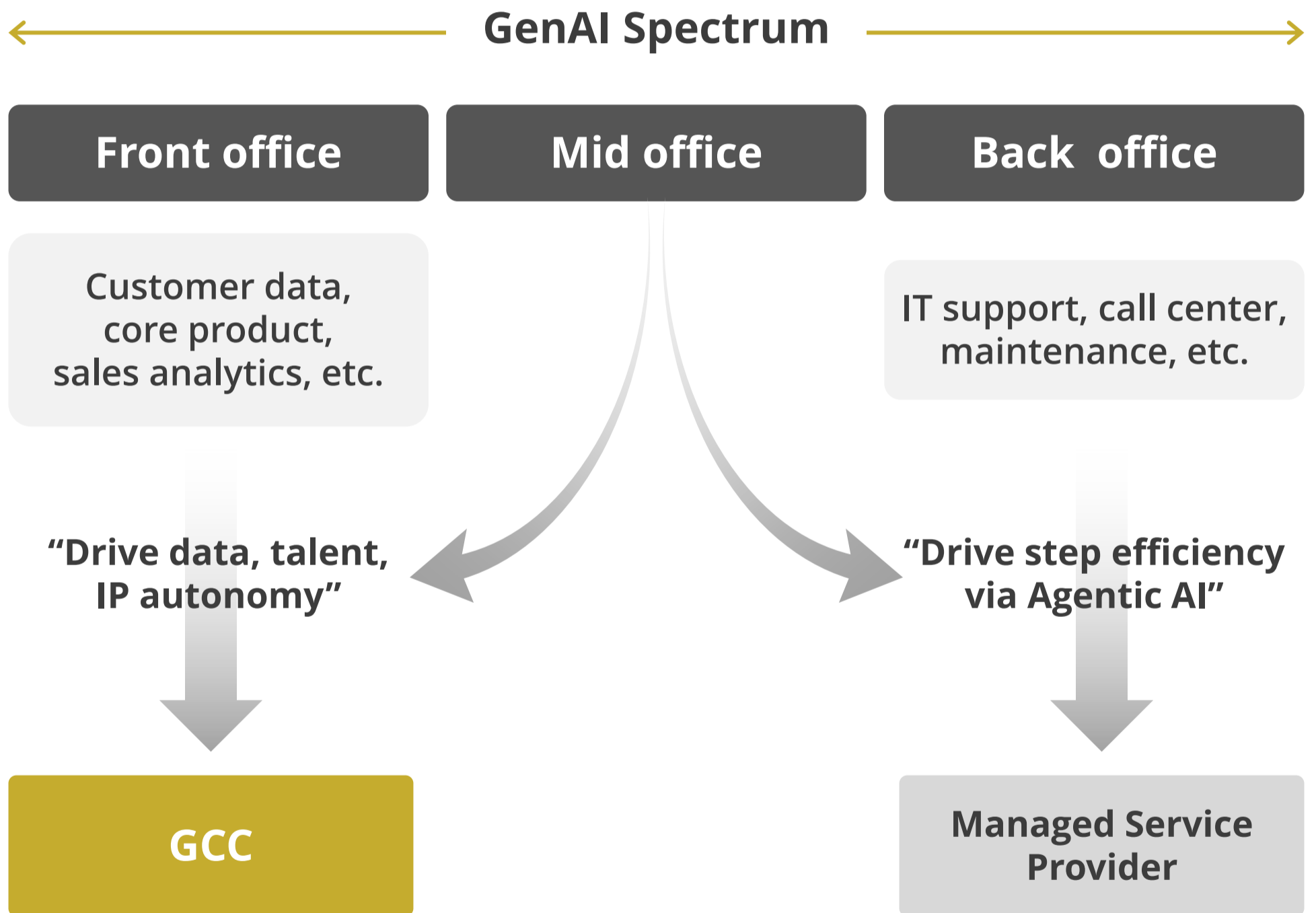
BOTs are **old-school and vendor leaning.**

NO well-informed enterprise wants

- **Build related capex**
- **Operate covenants**
- **Transfer uncertainty**



Enterprise Value Dictates GenAI Sourcing



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Enterprises over-invest in location intelligence with advisors*. The one unstated fact that they **DO NOT** tell you:

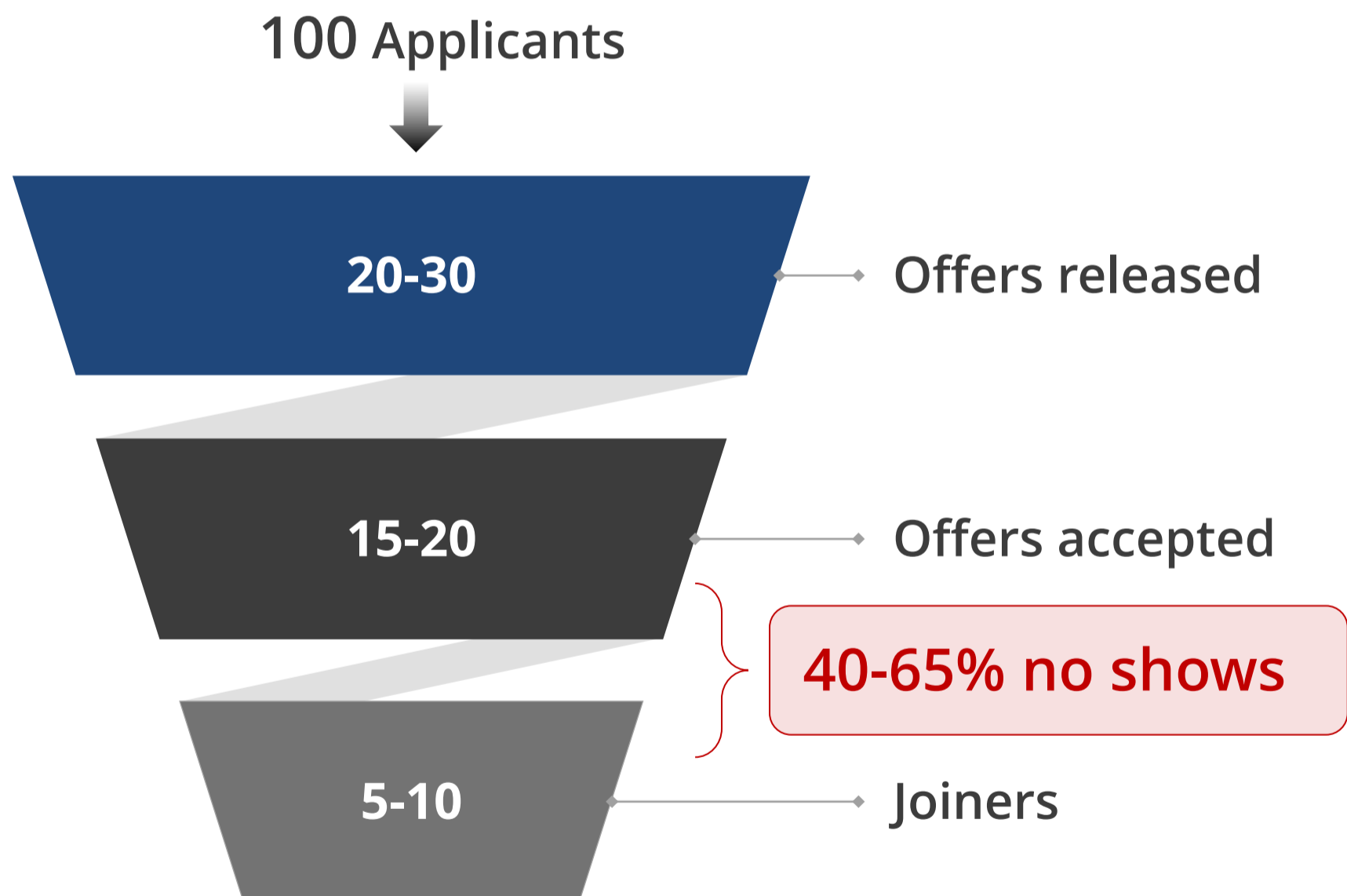
**All intelligence aside,
you will set-up your GCC in the
location that your site lead is most
familiar with and/or rooted to.**

* HEX's location intelligence benchmarks are core and complementary to our client conversations **#JustAskHEX**

”

The India Inc.'s No-Show Crisis: 75% of New GCCs Lagging in Scaleup Plans!

With up to 65% no shows, India accounts for one of the highest no-show rates globally



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No two children are the same, just as no two **GCCs** are. Who they become is largely attributable to their parents.

Sarthak Brahma

CEO, HEX Advisory Group

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Thinking

B O T ?

Then you are already being led down a beaten path.

HEX delivered **six bespoke GCC Models** this past year, and **NONE** handcuffed our clients in:

- ⊗ **B**uild Capex
- ⊗ **O**perate Covenants (term, value, scale, scope)
- ⊗ **T**ransfer Uncertainty



Break Free from the Beaten Path – Explore Bespoke GCC Models Today!

“

No one remembers the nurses who delivered Lincoln or Einstein. It doesn't take a genius to birth a genius—just an exceptionally skilled practitioner.

HEX delivers GCCs the same way: expertly, efficiently, and in the shadows.

Sarthak Brahma

CEO, HEX Advisory Group

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Watch this space for more valuable insights on the **GCC industry**

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