

Global Competency Center (GCC) Services 2025 Market Insights™

Driving Enterprise Value Creation
Through GCC Transformation

August 2025

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About the report

About the Global Competency Center (GCC) Services 2025 Market Insights report

1

The Global Competency Center (GCC) Services 2025 Market Insights is a companion report to the Global Competency Center (GCC) Services 2025 RadarView. While the RadarView report concentrates on evaluating service providers, this report takes a broader perspective, offering a comprehensive overview of the current state of the GCC market and Avasant's outlook on its future trajectory.

2

Amid growing interest in the GCC space in recent years, this report aims to inform key stakeholders, including enterprises, service providers, and GCC leaders about the major trends shaping this dynamic landscape. It explores the primary growth drivers, evolving strategic priorities, and the broader transformation of the GCC ecosystem.

3

This report was created with detailed data collection through our ongoing market tracking leveraging the Avasant GCC Intelligence Platform, market surveys and executive interactions with enterprises, GCCs, and service providers. The data and analysis was further strengthened with Avasant's real-world GCC project experiences.

4

The Global Competency Center (GCC) Services 2025 Market Insights report equips stakeholders with a deep understanding of the current landscape and future trajectory of the GCC market, serving as a valuable tool for strategic planning and decision-making.

Avasant's Global Competency Center (GCC) definition

A Global Competency Center (GCC) is a fully owned and operated offshore or nearshore unit of an enterprise that acts as a global hub focused on market entry, specialized expertise, and high-value delivery. GCCs integrate both front-office and back-office functions, driven by experienced resources, to support enterprise objectives. They deliver a wide range of functions across operations, IT, digital, and engineering research & development (ER&D), leveraging global talent pools and the cost efficiencies of the regions they operate in. Over time, GCCs have evolved to move up the value chain, from labor-based delivery to expertise-based, innovation-driven models.

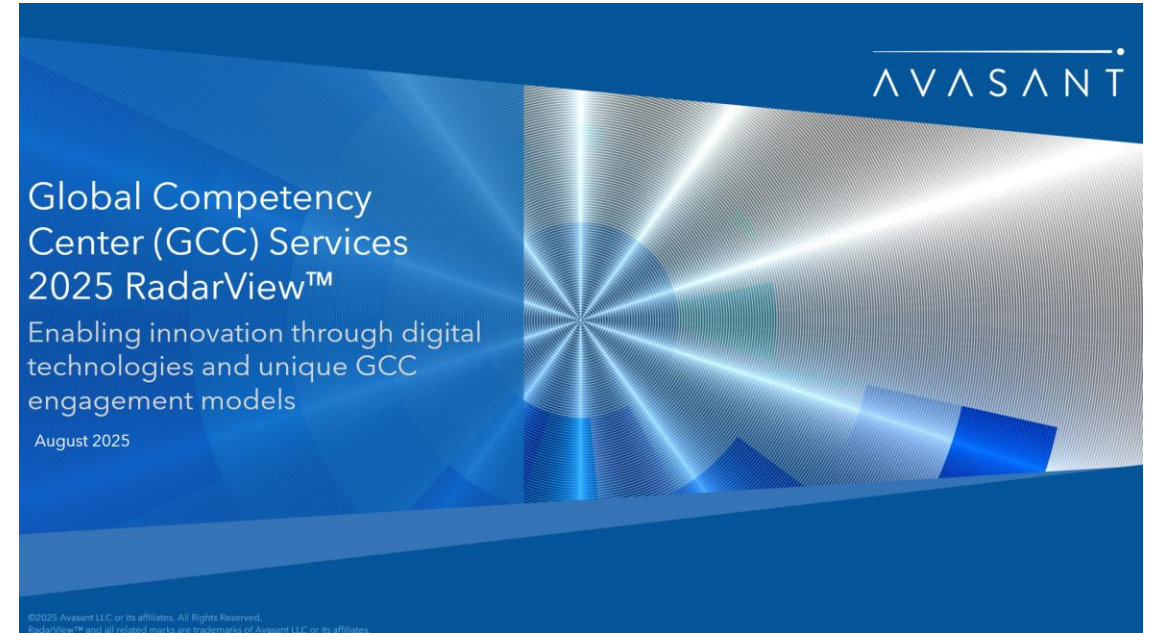
These centers are not external vendors or third-party providers. They are integral parts of the enterprise, aligned with its goals, culture, and operations. GCCs closely coordinate with headquarters and regional teams to stay aligned with global strategies and goals. They engage in regular communication, joint planning, and cross-functional teamwork, contributing to enterprise-wide initiatives.

Key reports of Avasant's Global Competency Center Research



Market Insights™ 2025

This report provides a comprehensive overview of the Global Competency Center landscape. It delves into the current state of the market, analyzes recent trends shaping the industry, and offers a perspective on the future outlook for GCCs.



RadarView™ 2025

This report examines how leading service providers are delivering GCC services. It covers key supply-side trends and features a deep-dive analysis of providers that Avasant has recognized for their excellence and innovation in the space.



Executive summary

Key GCC trends shaping the market

Global market trends

Growth & Untapped Potential



GCCs have grown by ~10% in the last three years, yet significant untapped potential remains

Implications

- The GCC landscape has experienced consistent growth in new setups and expansions over the past three years, with ~18% increase in headcount.
- Currently, 400 out of the Forbes Global 2000 companies have established GCCs in India, indicating untapped headroom in the market, especially as enterprises recognize the value of GCCs for innovation.

Asset Monetization



Enterprises reposition mature GCCs for strategic asset monetization

- As GCCs mature, they become more valuable to their parent firms. However, if they only focus on streamlining costs and achieving operational goals, they might be seen as assets to be monetized.
- Consequently, GCC leaders are focusing on becoming multi-function, owning core processes, and increasing focus on driving enterprise wide innovation and transformation.

Innovation Focus & Digital Shift



GCCs are shifting their focus towards innovation, moving beyond traditional cost benefits

- A clear trend shows that GCCs are heavily investing in innovation, with 52% of job openings in the top 20 mature GCCs now requiring innovation skills. This is a higher demand than for standard process roles.
- The focus on innovation is further underscored by the fact that over half of GCCs (51.5% combined) are now concentrating on digital (24.3%) and ER&D (27.2%) capabilities, with a particular rise in demand for AI/ML roles, reflecting their evolution into innovation hubs.

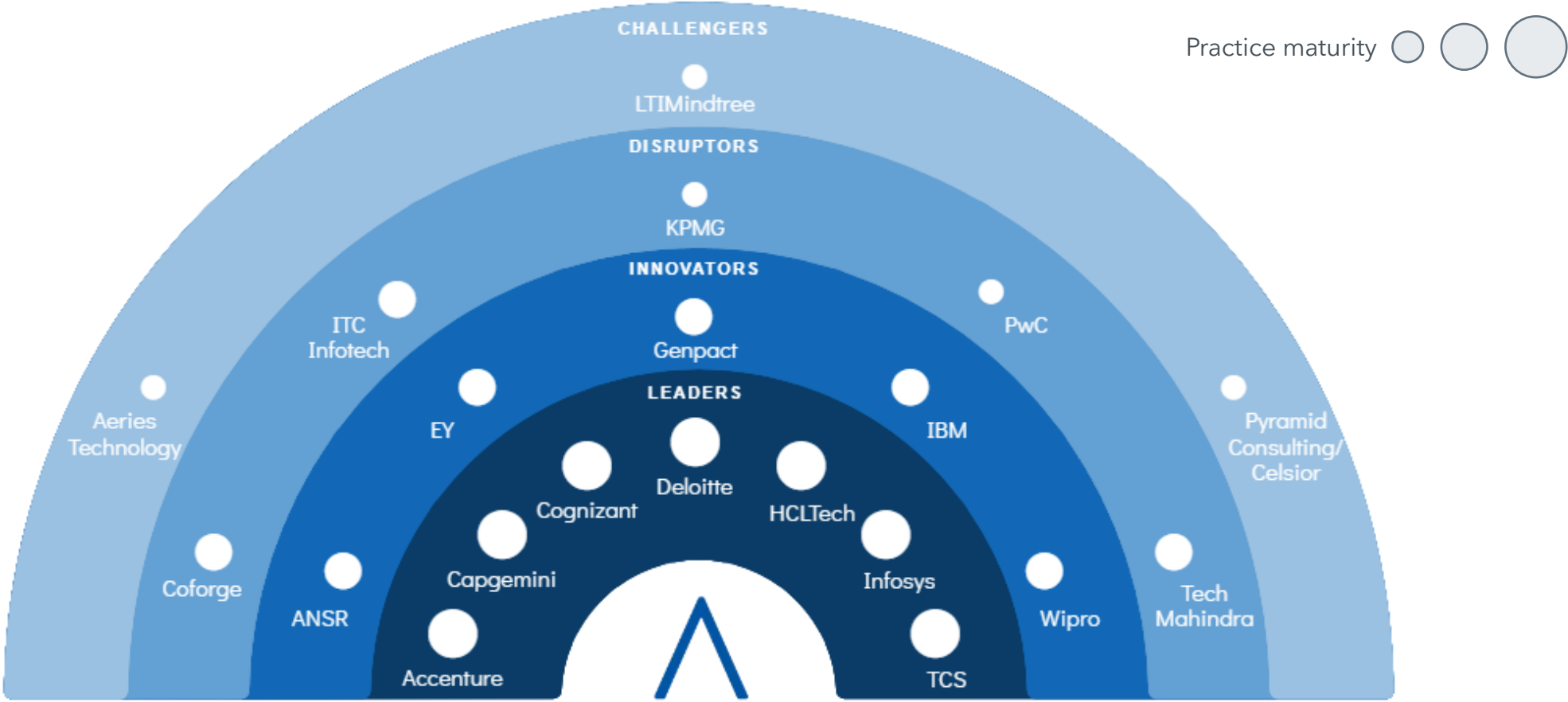
Collaborative Ecosystem



GCCs and service providers' collaborations are increasing; it isn't a zero-sum game

- GCCs are increasingly partnering with service providers for specialized skills and advanced tech such as AI/ML and cloud, accelerating their innovation without heavy in-house investment.
- Collaboration enables GCCs to quickly scale operations up or down, while providers gain stable partnerships.

In this report's companion study, Global Competency Center (GCC) Services 2025 RadarView, the following service providers were recognized



Note 1: Assessments for Deloitte, EY, IBM, Infosys, KPMG, PWC, and TCS were conducted based on public disclosures and market interactions only.
Note 2: Please refer to Avasant's *Global Competency Center (GCC) Services 2025 RadarView* for a detailed analysis of the service providers and supply-side trends.



GCC State of the Market

Both enterprise and supply drivers have created a perfect storm for establishing and growing Global Competency Centers (GCCs) rapidly in the last three years

Enterprise side drivers

Balance cost with innovation

Enterprises are facing tough macroeconomic conditions and a hypercompetitive market where tech-led transformation is a survival strategy

Optimize and control core processes

Enterprises want to maintain control processes that are competitive differentiators for them

Access fast evolving skillsets

As technologies evolve rapidly, enterprises have to ensure an abundant talent pool with the latest skills

Supply side drivers

Government push to attract GCCs

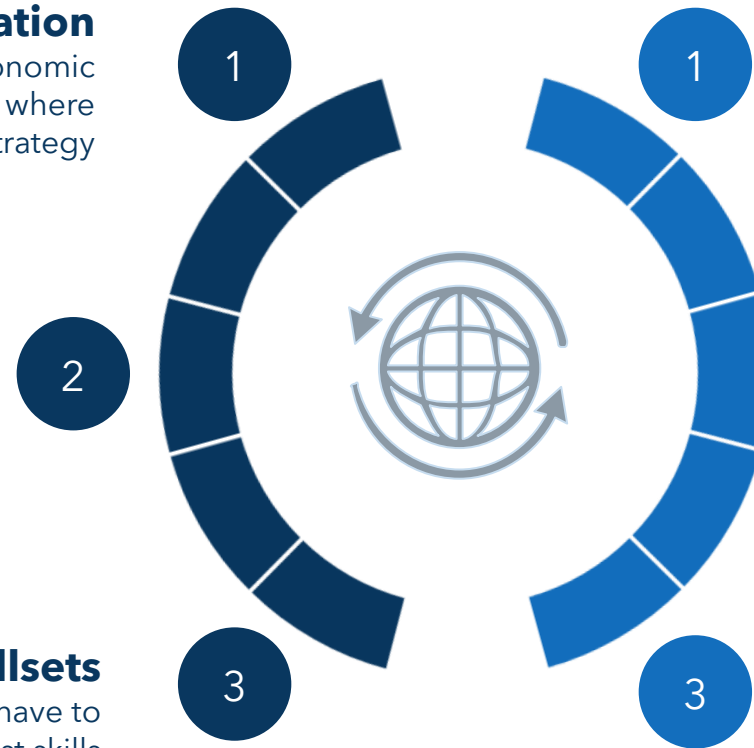
Supportive policies, tax benefits, and infrastructure development offered by host governments are attracting and growing GCC operations

Providers are enabling GCC's with AI and R&D expertise

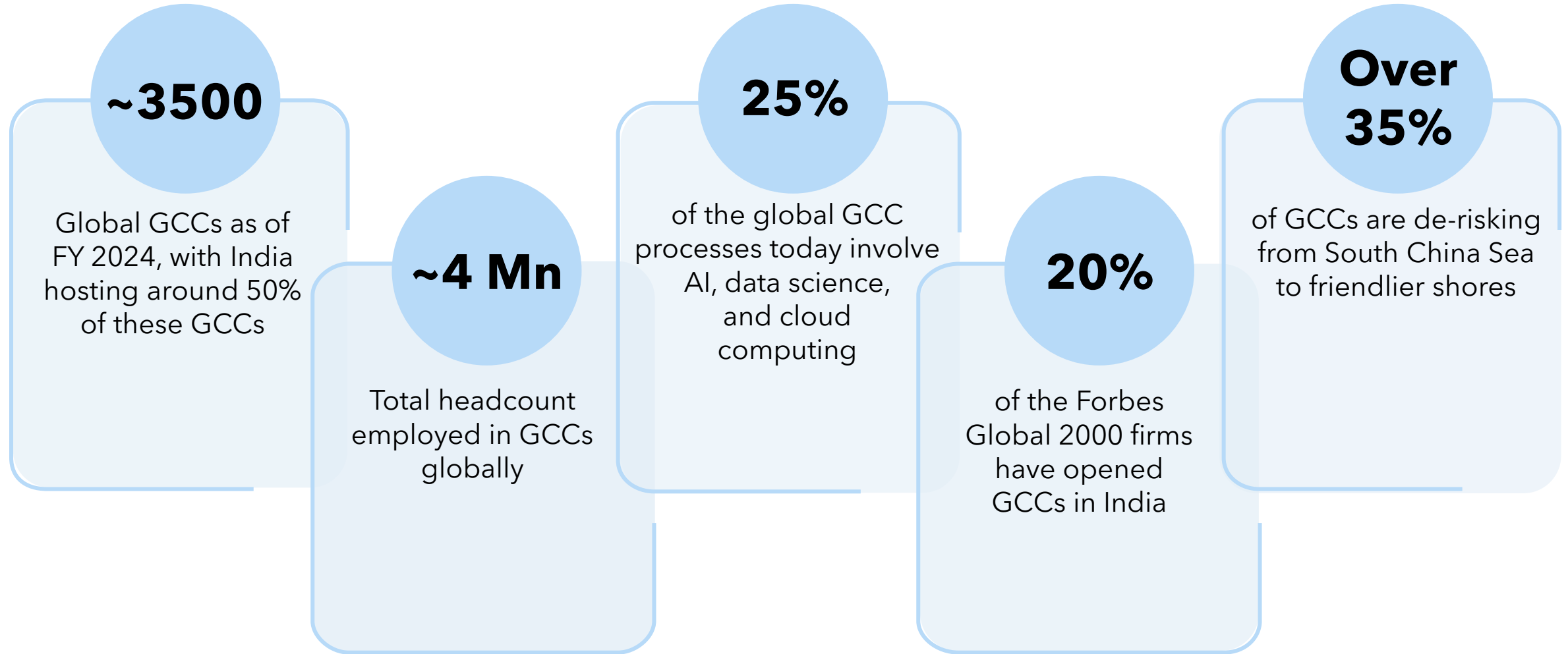
Service providers support enterprises with domain expertise and proven frameworks to adopt ER&D and AI technologies

Availability of skill at scale

Access to a large pool of skilled talent, often at competitive costs, enables the scaling of GCC operations



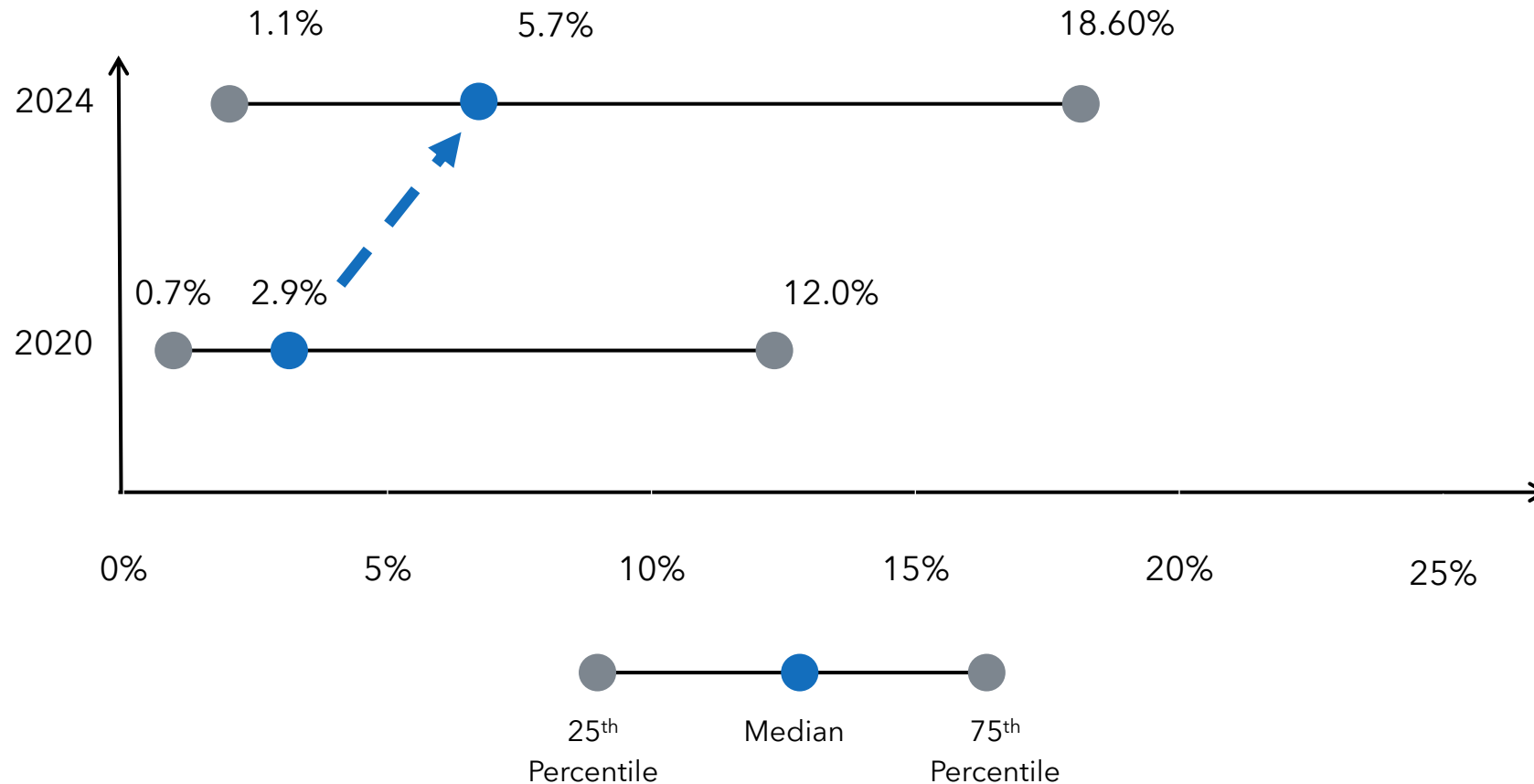
Enterprises across the world are leveraging Global Competency Centers (GCCs) to scale smarter, innovate faster, and grow stronger



Source: Avasant Research, Avasant GCC Intelligence Platform

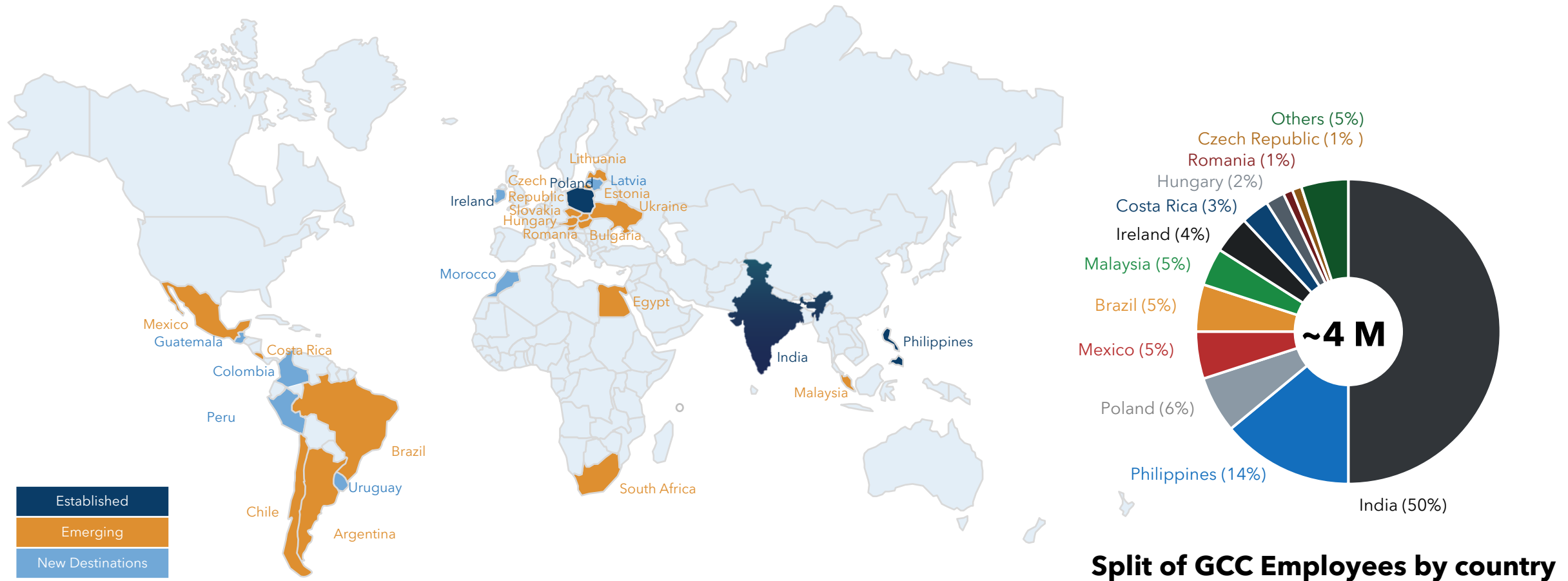
GCC's significance in the parent enterprise's strategy and operations is rising

Significance ratio: GCC headcount/Total enterprise headcount



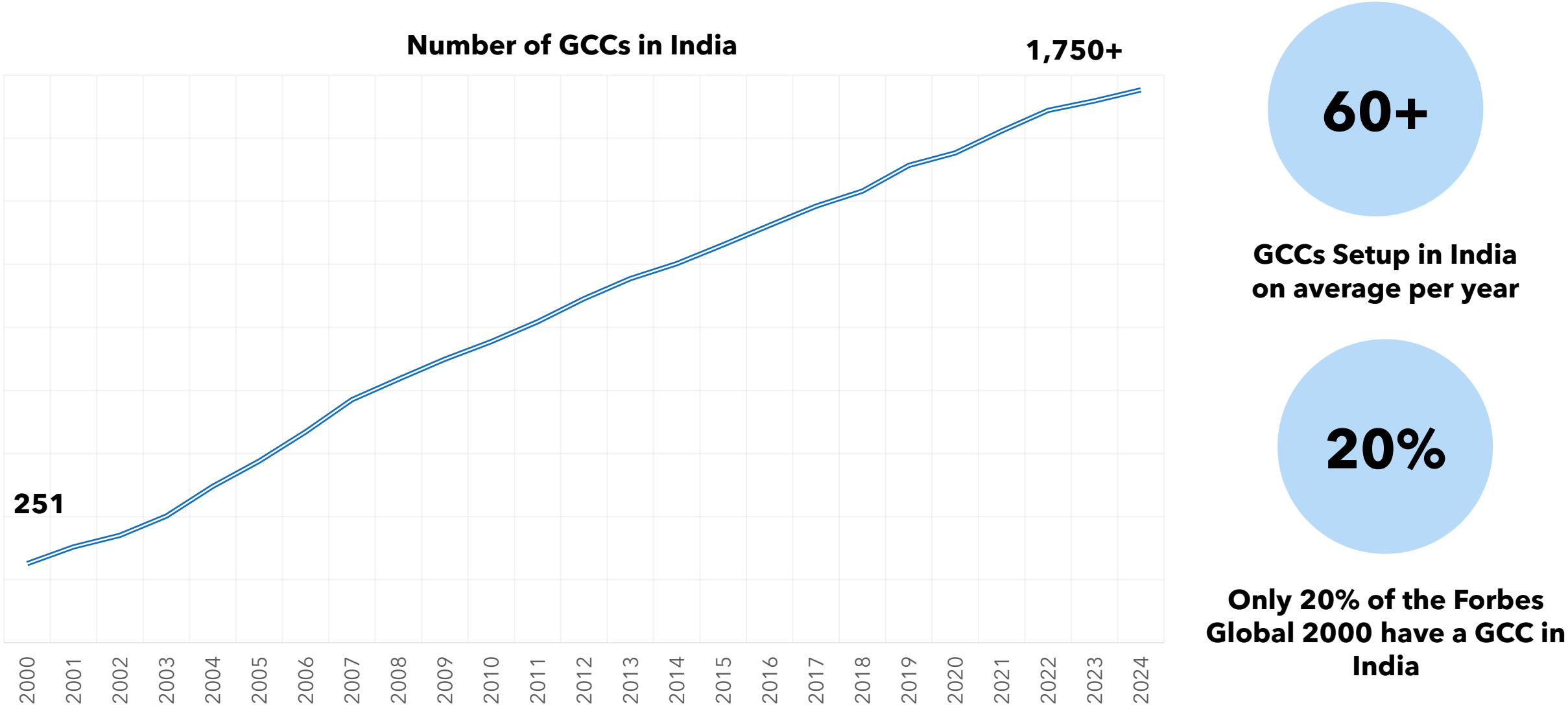
- Significance ratio has risen sharply from 2020 to 2024 reflecting the enterprises' growing reliance on GCCs for core business and technology roles.
- This trend also signals a shift in enterprise hiring patterns, with many organizations sustaining or increasing GCC hiring even as overall hiring slows.

GCCs have become a global phenomenon with several new locations emerging;
India is currently the most mature and established GCC destination



Source: Avasant Research

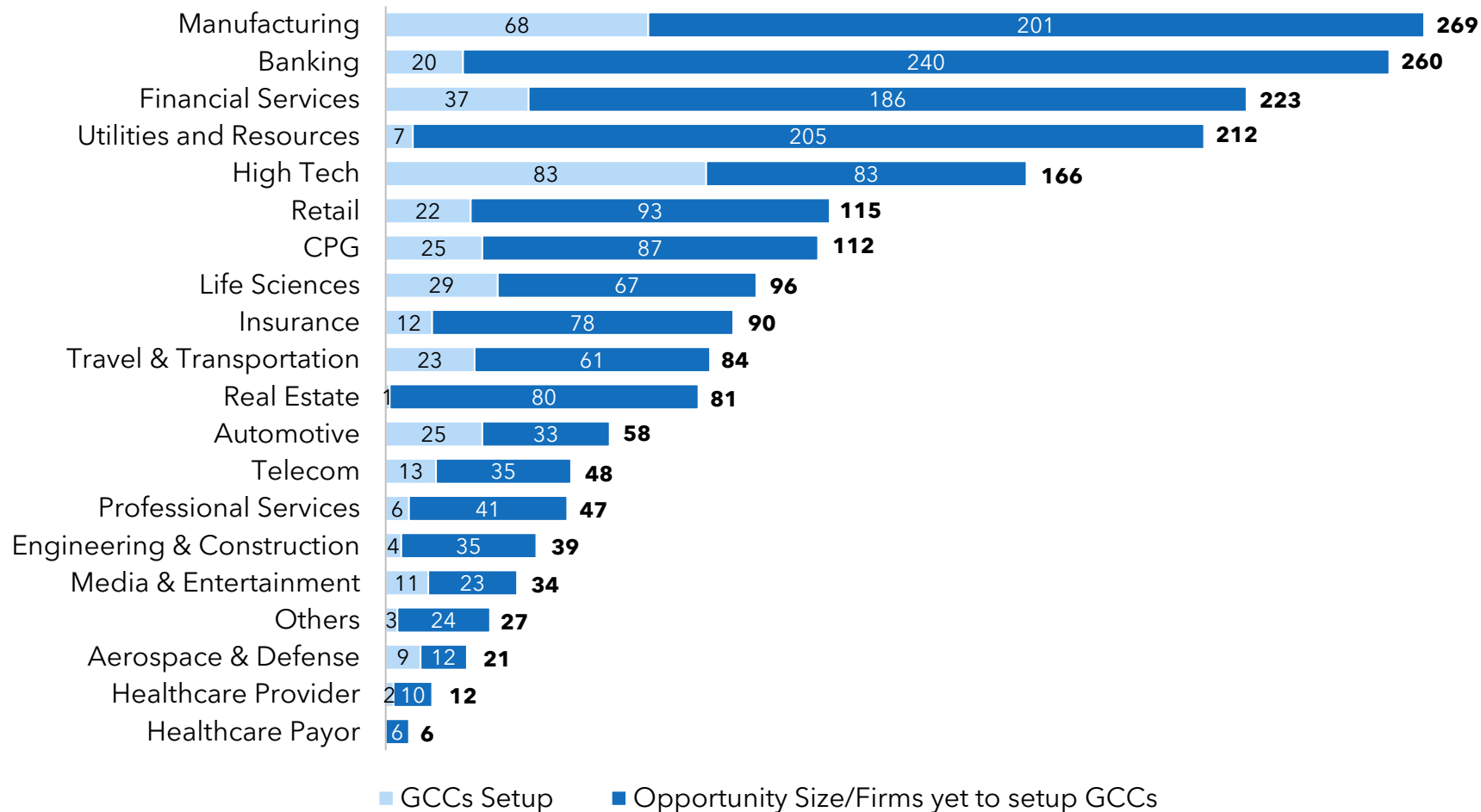
GCCs in India have grown consistently; however, there is still significant headroom for GCC growth in India



Source: Avasant GCC Intelligence Platform

Only 400 Forbes Global 2000 firms have set up their GCCs in India, revealing substantial growth potential for the GCC market in India

Split of Forbes Global 2000 firms with GCCs in India



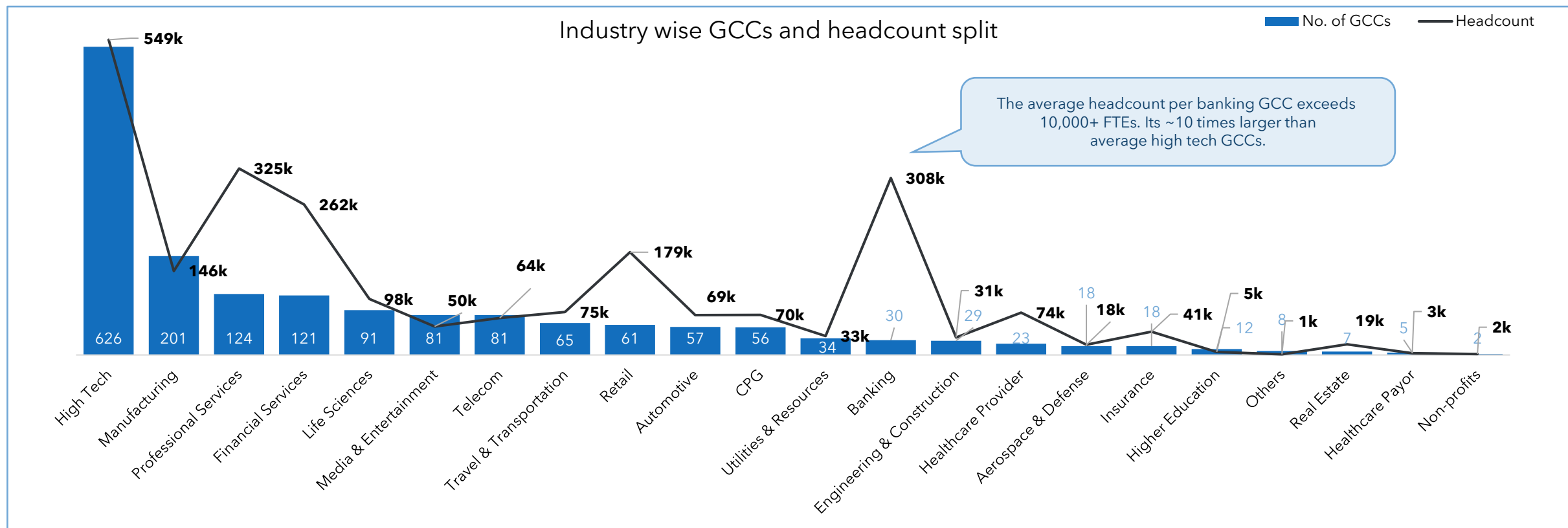
Vast Untapped Market Potential

- 80% of Forbes Global 2000 firms are yet to establish GCCs in India.
- Manufacturing, banking, and financial services remain key sectors with room for large-scale GCC growth.
- High Tech leads GCC adoption, with 50% growth potential.

Significant Untapped Potential in Consumer & Health

- 88 GCCs were set up by Forbes Global 2000 firms across Retail, CPG, Life Sciences, and Insurance.
- This is driven by recent setups such as Walmart, Zoetis, and Generali in the last two years.
- Yet, 325 firms in these sectors are still untapped, highlighting potential for future GCC expansion.

High Tech leads in the number of GCCs opened, and banking dominates in the average size of the workforce



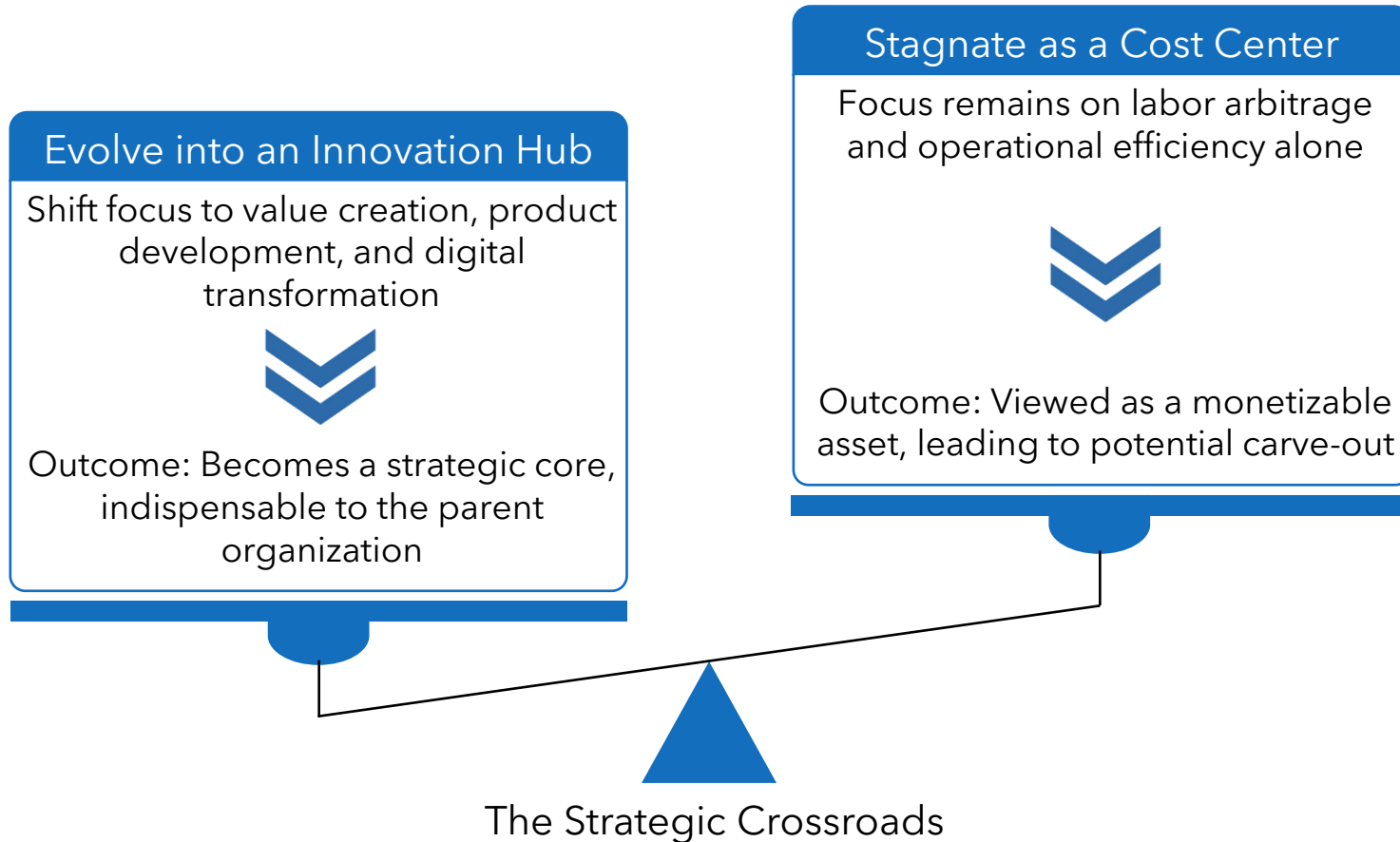
Highlights:

- High Tech GCCs are leading with the highest number of GCC setups, but relatively lower average headcount, signaling innovation-led teams rather than scale-driven expansion. In contrast, banking firms operate significantly larger GCCs, focusing on enterprise-wide initiatives, that requires large teams.
- With numerous GCCs, manufacturing firms maintain focused initiatives driven by its GCC workforce. In contrast, both professional services and financial services firms have significantly large talent pools within fewer GCCs, highlighting their role as major strategic hubs for enterprise-wide services delivery.
- Life sciences, media & entertainment, and telecom together account for a significant over 250 GCCs, reflecting strong adoption across these industries. With rising demand for digital transformation, content delivery, and healthcare innovation, this number is expected to grow steadily in the coming years.



The path ahead for GCCs

Enterprises retain GCCs that create strategic value, often considering spin-offs or sale of the underperforming, cost-focused units



Carve-out examples



- In April 2024, Happiest Minds bought Macmillan Learning India GCC, providing software development for the Macmillan Group (USA).

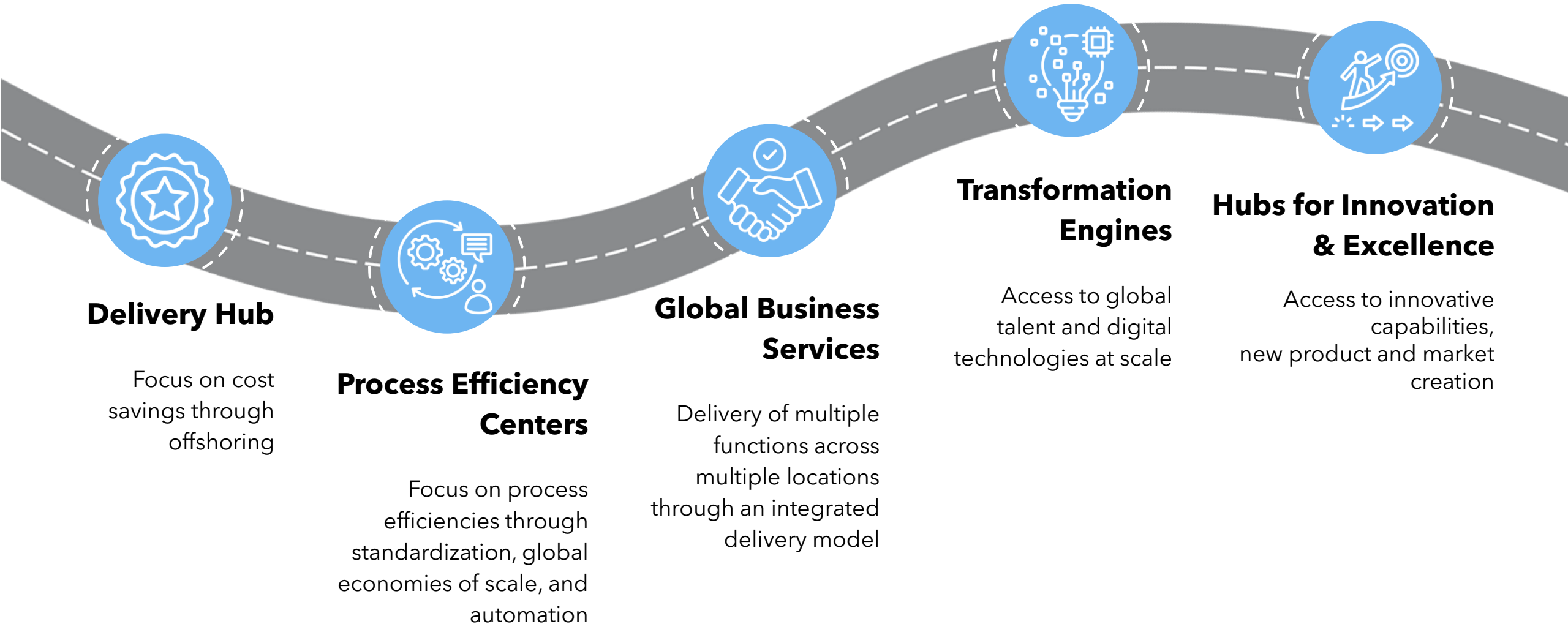


- The acquisition strengthens Happiest Minds' Edtech sector and enhances its Gen AI capabilities, aligning with its focus on AI-driven solutions.



- In September 2023, Infosys acquired Danske Bank's IT center in India, enhancing its presence in the Nordics and strengthening its financial services.
- This deal involved over 1,400 Danske Bank IT professionals joining Infosys to help accelerate Danske Bank's digital transformation.

GCCs are transitioning from mere functional and tech efficiency centers to hubs for innovation and excellence



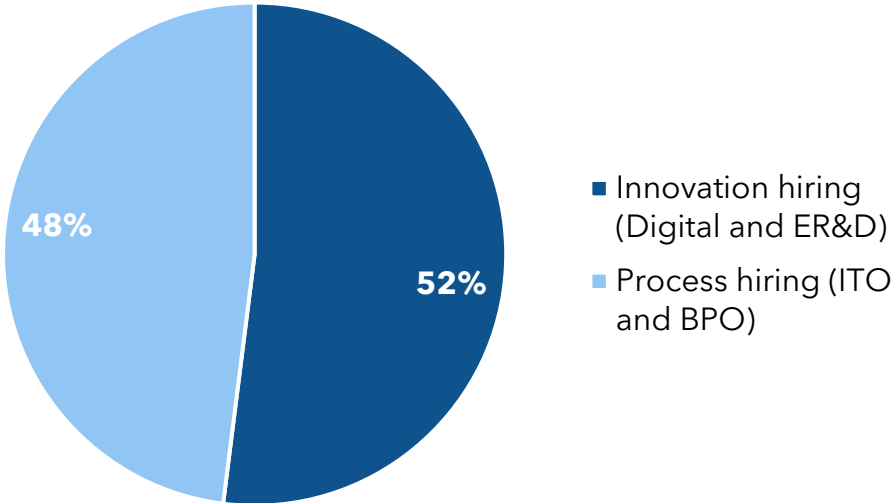
To align with the new innovation imperative, GCCs are expanding their talent pools by actively hiring for dedicated innovation roles

Mature GCCs are increasing their focus on innovation

	Cost & Efficiency	Process & Talent	Innovation
Greenfield setup	46%	33%	21%
Brownfield (0 - 2 years) - Young GCCs	34%	39%	27%
Brownfield (2-7 years) - Growing GCCs	31%	47%	22%
Brownfield (7+ years) - Mature GCCs	21%	38%	41%

Note: These percentages indicate the primary focus areas for GCCs at different stages of their maturity.

Distribution of hiring at the top 20 Mature GCCs



Note: This chart illustrates the distribution of hiring priorities within the top 20 Mature GCCs

Source: GCC and Parent Executive interviews, GCC Career portals

GCCs drive innovation by strategically hiring and scaling diverse talent for advanced tech, operations, and R&D engineering



Scaling for engineering talent

- Vanguard set up its first GCC in Hyderabad with plans to onboard 2,500 skilled engineers within four years.
- This new GCC will concentrate on key areas like AI, data analytics, mobile, and cloud engineering, leveraging India's rich tech talent pool.



Scaling for R&D

- Zeiss set up its GCC in Bengaluru in 2024 to tap into India's technology workforce for global R&D efforts.
- The center will concentrate on AI, cloud, cybersecurity, digital transformation, and medical technologies, with plans to hire over 600 employees and double by 2028.



Scaling for product innovation

- Wayfair established its GCC in Bengaluru, aiming for growth from zero to over 550 employees within two years.
- The center focuses on leveraging India's deep tech talent pool to drive AI, ML, and product innovation, to reach 700 employees by 2025.



Scaling for operations

- RSM US is scaling its India GCC, with plans to more than double its headcount to 5,000 employees within three years.
- The center is focused on enhancing operations across consulting, audit, tax, and AI-powered services by leveraging India's deep talent pool.



Scaling for digital talent

- In May 2023, Visa set up a new technology hub in Poland to expand its digital capabilities.
- This hub aims to hire over 1,500 professionals, focusing on AI, cybersecurity, and digital payments, leveraging Poland's strong talent pool.



Collaborating with service providers

GCCs are partnering with service providers for end-to-end support across the value chain via engagement models

GCC services value chain	Services	GCC services specialist providers	IT services providers
Strategy & Design	<ul style="list-style-type: none"> Initiate GCC vision: Define its purpose and strategic Lay the groundwork: Detail location, talent, and governance plans 	●	●
Build	<ul style="list-style-type: none"> Construct the core: Set up infrastructure and organizational framework Assemble the team: Attract and strategically integrate talent 	●	●
Transition	<ul style="list-style-type: none"> Enable smooth handoff: Plan and execute the operational shift Formalize operations: Implement controls, staffing, and system platforms 	●	●
Operate	<ul style="list-style-type: none"> Manage daily execution: Oversee routine GCC activities Ensure continuous support: Provide governance, essential tools, and tech 	●	●
Scale & Transform	<ul style="list-style-type: none"> Elevate strategic role: Guide GCCs to become innovation powerhouses Drive modernization: Lead digital transformation and automation 	●	●
Digitization	<ul style="list-style-type: none"> Empower the workforce: Enhance skills to boost overall productivity Future-proof technology: Integrate advanced tech to ensure readiness 	●	●

● Strong capabilities
 ● Moderate capabilities
 ● Weak capabilities

Provider-focused models leveraged by GCCs across the value chain



Build-Operate-Transfer (BOT)

(Set up, manage, and then transfer the GCC operations to the client)

Build-Operate-Automate-Transfer (BOAT)

(Establish, run, automate workflows with AI, and then transfer the automated GCC to the client)

Assisted

(Optimize processes, implement tech solutions, and offer flexible talent augmentation)









Turnkey

(Remote operations support, managing infrastructure, tools, talent, and compliance)

JV/Partnership

(Collaborate in a joint Go-To-Market strategy, sharing investment)

GCCs are leveraging service provider capabilities across the value chain to accelerate their transformation initiatives

Enterprises	Service Providers	Value Chain	Illustrative examples
		Build Operate Transition	<ul style="list-style-type: none"> Citizens Financial Group partnered with Cognizant to launch a new GCC in Hyderabad, aimed at accelerating innovation and technology execution. Leveraging a Build-Operate-Transfer (BOT) model, Cognizant will manage the GCC's setup and operations, scaling to 1,000 professionals by March 2026 for next-gen banking solutions.
		Strategy & Design Build Operate	<ul style="list-style-type: none"> Aeries Technology has been selected by Diligent, a SaaS firm, to establish and grow a new GCC in Guadalajara, Mexico. It will support this initiative through advisory services, talent acquisition, pilot-based scaling, and optimization, to enhance customer service functions and operational efficiency for Diligent.
		Build Operate Scale & Transform Digitalization	<ul style="list-style-type: none"> Daikin collaborated with EY to establish the GCC in Gurgaon, India, focusing on enhancing IT, digital, finance, and AI capabilities. This strategic hub aims to employ approximately 700 individuals, leveraging India's talent pool for Daikin's global operations and reinforcing India's role as a key market.
		Strategy & Design Build Operate	<ul style="list-style-type: none"> Lowe's partnered with ANSR for a solution that covered all aspects of setting up the India GCC, including sourcing and hiring top talent, leasing and setting up the workspace, and managing IT infrastructure. ANSR leveraged advanced tools like AI and a global network to efficiently recruit specialized tech and non-tech talent.

The image features a dark blue background with a subtle, radial pattern of concentric circles and lines emanating from the center. In the upper center, the word "AVASANT" is written in a white, sans-serif font. Above the text is a thin white horizontal line that ends in a small white dot on the right side.

AVASANT

Future Outlook

GCCs are evolving as strategic global hubs driving innovation and digital transformation, and poised to act with strategic conviction



GCCs will become more strategic, leading to new setups and expansions. Enterprises increasingly recognize GCCs as vital engines for managing core processes, and innovation, driving further investments in their scale and global footprint.



GCCs will gain greater autonomy to lead enterprise-wide transformation. Expect GCCs to move beyond operational efficiency, driving broader mandates to spearhead digital and strategic change across the organization.



More GCC carve-outs and acquisitions by providers are expected. Companies will divest non-core GCCs which are stagnating as cost centers, and service providers will acquire them to expand scope, capabilities and talent pools.



Leadership roles from GCCs to rise significantly. As GCCs become more strategic, they will naturally foster executive leadership that will have an impact across the parent enterprise.



GCCs are set to become primary hubs for enterprise AI adoption. Their unique position makes them ideal for piloting, developing, and scaling AI, GenAI, and automation solutions across the enterprise.



Service providers will rapidly expand and diversify offerings for GCCs. Recognizing the growing opportunity, providers will strategically invest in specialized services, co-creation models, and advanced tech support tailored for GCCs.

AVASANT

Cognizant profile

Cognizant: RadarView profile



Practice overview		Client case studies				
<ul style="list-style-type: none">Practice size: 20,000+Active clients: 120+Delivery highlights: Around 117 delivery centers across Asia, North America, Europe, Latin America, the Middle East, and Africa		<ul style="list-style-type: none">Established a global competency center (GCC) in Hyderabad for Citizens Financial Group in 2025, leveraging Cognizant Neuro and FlowSource to accelerate digital transformation. The center will aim to enhance innovation, support cloud migration, and boost time-to-market for new products.Established a GCC for a European education and publishing firm under a BOT* model, scaling to over 2,000 resources and ensuring smooth vendor transitions. This engagement delivered \$55M in committed savings and transferred over 170 associates post a seven-year build and operate phase.Established a GCC in Hyderabad for a communications tech firm, delivering HR services across talent acquisition and operations with AI, RPA, and Gen AI-enabled transformation. It achieved 40% process efficiency improvement, 100% role fulfillment, and 97% turnaround within 24 hours.Established a GCC in India for a pharmaceutical company to centralize customer operations, drive Gen AI-led automation, and consolidate global vendors. This resulted in a 35% increase in productivity and a 25% reduction in total cost of ownership.				
<div><div>~20%</div><div>Growth in GCC clients, CY 2023 to CY 2024</div></div> <div><div>~ 60%</div><div>Revenue share from very large (>\$25B revenue) GCC clients, FY 2024</div></div>		Key IP and assets		Key partnerships	Sample clients	Value Chain Coverage
<ul style="list-style-type: none">Cognizant Ignition™: An AI-powered tool enabling automated data platform modernizationCognizant FlowSource™: An AI-powered platform accelerating secure, collaborative, full-stack software developmentCognizant WorkNext™: An AI-driven platform enhancing digital workplace experience, productivity, and complianceNeuro® AI: An AI-powered front office tool enhancing automation and continuous improvement					<ul style="list-style-type: none">Citizens Financial GroupA European education and publishing firmA communications tech firmA pharmaceutical companyA North American bankA data collaboration providerA financial services companyA healthcare companyA global payment technology firmA provider of personal finance	<div>Strategy and Design</div> <div>Build</div> <div>Transition</div> <div>Operate</div> <div>Scale and Transform</div> <div>Digitalization</div>

Darker color indicates higher industry concentration: ●●●●●

*BOT: Build-operate-transfer

- Practice maturity ★★★★★
- Partner ecosystem ★★★★★
- Investments & innovation ★★★★★

Leverages Gen AI solutions, partnerships, CoEs, and global talent programs to provide end-to-end GCC services to global clients.

Cognizant: RadarView profile

Analyst insights

Practice maturity



- Cognizant offers end-to-end GCC services across various industries, delivered from global locations including North America, Europe, Asia Pacific, Latin America, the Middle East, and Africa. With over 60% of its GCC clients headquartered in the US, it emphasizes local hiring to strengthen in-country delivery and enable closer client collaboration, supported by its integrated global delivery model and scalable digital capabilities.
- It is expanding its global delivery capabilities for GCC clients by entering emerging locations such as Bhubaneswar, Indore, and Gift City, Ahmedabad, while strengthening its presence with the opening of a new campus in Hyderabad in 2024. It is also strengthening its market share in industries such as communications and media, energy and utilities, oil and gas, and aerospace and defense through managed services deals and strategic partnerships.
- It supports GCC clients in scaling and transforming greenfield and brownfield centers through specialized GCC microservices tailored to specific service line goals. Its in-house capabilities, flexible Talent Pipeline as a Service (TPaaS) solution, combined with specialized talent development recognized by NASSCOM and the Brandon Hall Group, ensure smooth operations, innovation, and future-ready teams.

Partner ecosystem



- Cognizant has partnered with Google to enhance its GCC offerings by providing advanced big data and analytics solutions. This includes setting up CoEs in Bengaluru and London, along with the Cognizant Google Cloud AI University, to upskill professionals and optimize technologies for GCC operations.
- It has also partnered with hyperscalers such as Microsoft and AWS, with over 35,000 developers trained on Microsoft solutions and over 8,700 experts certified in AWS, to enhance its GCC offerings through cloud, AI, and Industry 4.0 solutions, driving innovation and operational efficiency.
- It has partnered with IBM to support its GCC capabilities, training over 2,500 experts in advanced business solutions. In 2024, they launched a Global Financial Operations Center of Excellence to modernize enterprise applications and drive innovation with AI and mainframe modernization.

Investments and innovation



- Cognizant is scaling its GCC capabilities through strategic acquisitions, such as Thirdera, Belcan, and Mobica, enhancing AI, digital engineering, and cloud expertise. This has strengthened GCC services across strategy, transformation, and operations, enabling over \$100M in deals and client growth in 2024.
- It is investing \$1 billion over three years to enhance its Gen AI capabilities and train one million people in digital skills by 2026 through its Synapse program. This includes training 25,000 professionals in Google Cloud AI technologies, strengthening AI-led solutions, and cybersecurity.
- It has invested in embedded engineering, smart mobility, aerospace, defense, and Industry 4.0 transformation, developing the Neuro suite of platforms with multi-agent orchestration and AI labs. It is also investing in building the Cognizant AI Research Lab and AI innovation studios to foster AI innovation.



Appendix: About RadarView

Global Competency Center (GCC) Services 2025 RadarView assesses service providers across three critical dimensions

Practice maturity

- This dimension evaluates the type, market acceptance, and quality of offerings in the GCC services space. It also assesses the strength of the overall practice with respect to its size, certified employees, embedded expertise in emerging technologies, and value chain coverage.
- The width and depth of the client base, practice revenues, the use of proprietary/outsourced tools and platforms, and future strategy are important factors that contribute to this dimension.

Investments and innovation

- This dimension measures the strategic direction of investments and resultant innovations in the offerings and commercial model, and how these align with the industry's future direction.
- The overall strategic investments, both organic and inorganic, in capability and growth, technology development, and human capital development, along with the innovations that the service provider develops, are critical aspects of this dimension.

Partner ecosystem

- This dimension assesses the nature of the provider's partnerships and ecosystem engagements. It evaluates the partnerships' objective (codevelopment or co-innovation) and the provider's engagement with technology solutions or product providers, startup communities, and domain associations.
- The kind of joint development programs around offerings, go-to-market approaches, the overall depth of partnerships, and their leverage to deliver superior value to clients are important aspects of this dimension.

Research methodology and coverage

Avasant based its analysis on several sources:

Public disclosures	Publicly available information from sources such as Securities and Exchange Commission filings, annual reports, quarterly earnings calls, and executive interviews and statements
Market interactions	Discussions with enterprise executives leading digital initiatives and influencing service provider selection and engagement
Provider inputs	Inputs collected through the service provider capability decks and structured briefings from March 2025 to May 2025

Of the 68 service providers assessed, the following are the final 20 featured in the Global Competency Center (GCC) Services 2025 RadarView:



Reading the RadarView

Avasant has recognized service providers in four classifications:



Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, investments and innovation, and partner ecosystem) and have had a superior impact on the market as a whole. These service providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders, setting the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.



Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate in a few select areas or industries and distinguish themselves through superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers, redefining the rules of the game.



Disruptors enjoy inverting established norms and developing novel approaches that invigorate the region. These service providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of focus.



Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale of the service providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the region. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of the providers in other categories.

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