NEAT EVALUATION FOR COGNIZANT:

GCC Services

Market Segment: Overall

Introduction

This is a custom report for Cognizant presenting the findings of the 2026 NelsonHall NEAT vendor evaluation for *GCC Services* in the *Overall* market segment. It contains the NEAT chart of vendor performance, a summary vendor analysis of Cognizant, and the latest market analysis summary.

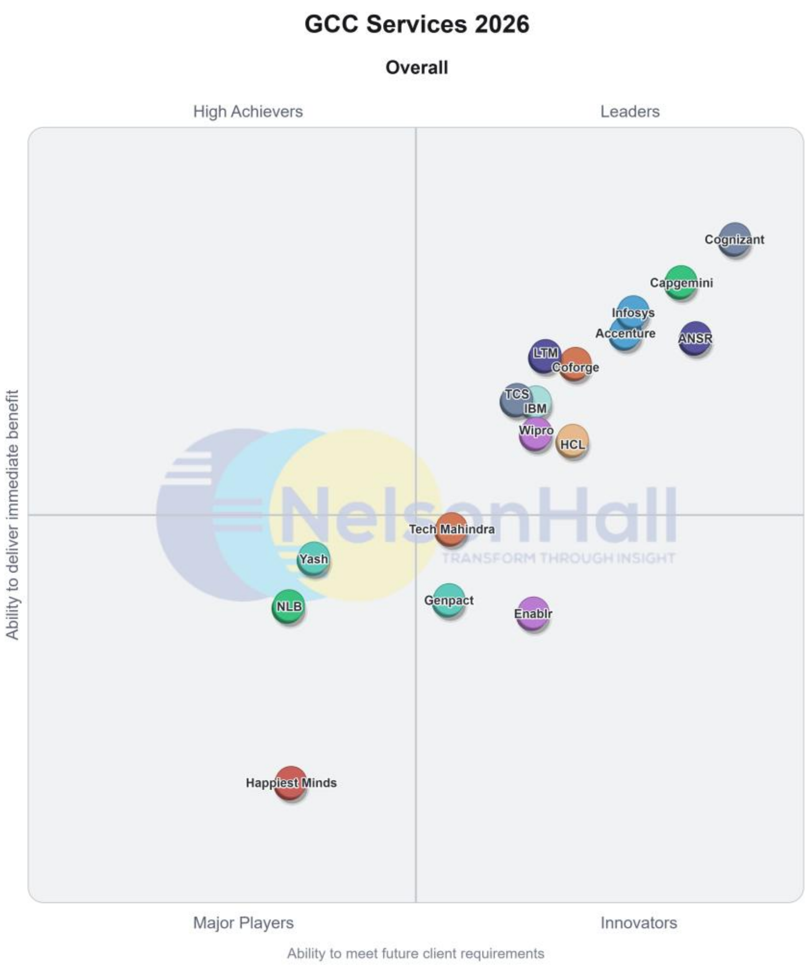
This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering services from Global Capability Centers (GCCs). The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors overall, and with specific capability in GCC set-up and delivering service transformation.

Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: Accenture, ANSR, Capgemini, Coforge, Cognizant, Enablr, Genpact, Happiest Minds, HCL Technologies, IBM, Infosys, LTM, NLB Services, TCS, Tech Mahindra, Wipro, and Yash Technologies.

Further explanation of the NEAT methodology is included at the end of the report.

NEAT Evaluation: Overall



NelsonHall has identified Cognizant as a Leader in the *Overall* market segment, as shown in the NEAT chart. This market segment reflects Cognizant's overall ability to meet future client requirements as well as delivering immediate benefits to its GCC services clients.

Leaders are vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements.

Buy-side organizations can access the *GCC Services* NEAT tool here.

Vendor Analysis Summary for Cognizant

Overview

Cognizant's GCC offering ranges across building greenfield GCCs, optimizing existing GCCs, and monetizing and exiting current ones. The company has ~120 GCC clients and added ~8-10 new clients in 2025.

Cognizant categorizes its GCC offerings into *new* and *existing*. New GCC services include design and advisory, build, operate, transform, transfer and hypercare, plus support modules such as talent strategy, risk and compliance, change management, and program management. Existing GCC offerings include operating model optimization, automation and transformation, digital asset optimization, and location and corporate function optimization.

These offerings are supported by multiple engagement models, including build/build-and-transfer, build-operate-transform-transfer (BOTT), joint operations, virtual captive or hybrid models, and dedicated offshore delivery centers, alongside a GCC-as-a-service construct covering support functions such as talent, HR, marketing, infrastructure, corporate, operations, leadership, and workspace services.

Cognizant has ~15k-18k FTEs supporting GCC delivery, with ~35% focused on core services and the remainder supporting staff augmentation and IT and BPS transformation. The offering is underpinned with proprietary platforms such as Ignition, Skygrade, Flowsource, WorkNext, and the Neuro AI suite, as well as partnerships with consulting, real estate, hyperscalers, automation, cybersecurity, and learning providers.

Financials

While Cognizant does not disclose GCC-specific revenue, NelsonHall estimates that it had a standalone GCC revenue of ~$70-80m for the year 2025.

Strengths

- Cognizant has an ecosystem of large enterprise clients across industries and has experience serving ~120 GCC clients
- The company provides a full spectrum of GCC services, including transformation programs, AI enablement, partner ecosystem orchestration, and proprietary intellectual property
- Cognizant continues to invest in scaling its GCC ecosystem and has a dedicated GCC leadership with access to the wider Cognizant client base and capabilities.

Challenges

- Cognizant could focus further on strengthening its GCC-specific advisory and strategy frameworks and IPs
- Low current penetration into mid-market GCC clients and a very high dependence on U.S. clients.

Strategic Direction

Over the next 12 months, Cognizant will work to enhance its GCC delivery through:

- Its AI builder strategy, anchored in three pillars: AI-led productivity, industrializing AI, and agentifying the enterprise
- Embedding GenAI, automation, and agentic AI via platforms like NeuroAI, Flowsource, and Agent Foundry to accelerate development and orchestrate autonomous agents with a focus on GCC operations
- Building and scaling cloud-native architectures and intelligent automation that will drive process transformation, supported by standardized governance and outcome-based KPIs
- Agile PODs and co-creation frameworks to boost speed-to-market, while AI labs and upskilling programs build a future-ready workforce
- Integrated governance and hypercare, which ensure compliance, delivering scalable, secure, and value-driven GCC operations globally
- Continuing to build a suite of technology transformation services tailored to GCC maturity and business needs while leveraging embedded engineering and AI capabilities.

Outlook

Expect Cognizant to:

- Invest further in capabilities around hyperproductivity, responsible AI, and dynamic experiences, supported by innovation labs and frameworks to drive a scalable, secure, and outcome-driven GCC offering
- Further strengthen and invest in GCC service delivery through its AI Builder strategy, combining proprietary IP development with strategic collaborations
- Grow its partnership with hyperscalers such as Microsoft Azure, Google Cloud, and AWS to integrate advanced GenAI and agentic capabilities into enterprise workflows
- Co-innovate with startups specializing in AI orchestration, domain-specific SLMs, and automation accelerators to deliver next-generation GCC solutions
- Grow its GCC ecosystem in areas such as alliances with the Big 4, MBBs, and niche consulting firms, alongside corporate functions tailored to local markets
- Ensure scalable, secure, and AI-native GCC transformation while leveraging these ecosystem partners and innovators in the GCC landscape.

GCC Services: Market Summary

Overview

The GCC services market is shifting from cost-arbitrage offshoring to capability building and operational scaling. Clients are setting up GCCs as innovation hubs, digital CoEs, and transformation engines, while vendor engagement is moving from setup to long-term partnering and co-creation with innovation and AI-first GCCs.

Technology and product engineering GCCs are the fastest-growing segment, with clients prioritizing AI/ML, cloud engineering, data analytics, and cybersecurity as the key use cases for GCCs. Beyond headcount, clients are also looking for outcome-based models with measurable KPIs, adoption of GenAI and agentic AI, and ROI within 12 to 18 months. Vendor portfolios are diversifying from BOT/T into hybrid managed services, JV co-ownership, and GCC-as-a-Service with an AI-first positioning.

Large enterprises account for ~70% of GCC market share, concentrated across financial services, healthcare, manufacturing, retail, and telecoms and media sectors. Mid-market clients are the fastest-growing segment.

Based on our client survey, the average NPS across clients is 8.4, with ~69% of clients as promoters, ~23% as passives, and ~8% as detractors. Talent management is the most commonly outsourced service, while GCC-as-a-Service accounts for 23% of services, indicating potential for growth. Ability to support transformation ranks as the top vendor selection criterion, followed by industry knowledge and FTE quality. 85% of clients are planning GCC digitalization initiatives over the next two years, with more than half expecting their vendor to play a major role.

Over the next three to five years, client priorities will move to AI-first capability building, autonomous operations, platform engineering, and consolidation of vendor footprint. Client requirements will shift from functional delivery to product engineering, cybersecurity operations, and agentic BPS. Demand for autonomous GCC operations with embedded agentic AI, intelligent automation, and IT infrastructure will become the baseline expectation rather than a differentiator.

Vendors will differentiate through proprietary AI platforms, industry-specific digital accelerators, pre-trained enterprise LLMs and SLMs, and technology stacks that can accelerate GCC maturity. Europe and the Asia Pacific will lead new GCC setups, while brownfield GCCs will target technology penetration and automation coverage as the primary growth lever. Mid-market and first- or second-generation outsourcing clients will adopt the GCC model at scale. India remains the mainstream destination, with growth shifting to tier-2 and tier-3 Indian cities.

Buy-Side Dynamics

- ~85% of large clients have plans to further digitalize their GCC operations, and ~54% of them have plans for GCC expansions, allowing vendors an opportunity to improve penetration
- IT and HR remain the key areas where vendors are most leveraged across GCCs; other areas where vendors are actively being leveraged include F&A, analytics, and ER&D
- While ~69% of GCC buyers are net promoters for their incumbents in the NPS study, there is a trail of detractors as well

- Transformation skills, contextual industry knowledge, and quality of FTEs are some of the key decision criteria when selecting a GCC vendor; speed of transformation is not a very high priority area amongst GCC clients.

Market Size & Growth

NelsonHall estimates that the GCC services market will grow from $1.6bn in 2025 to $1.94bn in 2029, representing a CAGR of ~5%. This is being driven by accelerating mid-market adoption, enterprise demand for AI-enabled GCC models, and a surge in demand for center-of-excellence establishments across APAC, Europe and North America.

As organizations look to move beyond cost arbitrage toward capability-led GCC strategies, vendors that can deliver integrated AI and agentic AI capabilities, transformation, and COE setup services are well-positioned to capture growing demand.

Success Factors

Key competitive differentiators and success factors in GCC setup and transformation include:

- Vendors bringing pre-built frameworks, accelerators, and proven playbooks that accelerate GCC setup timelines from 12–18 months to 3–9 months, enabling faster value realization and speed to market
- Vendors bringing pre-built accelerators and center of excellence teams with deep domain knowledge across industry and technology, reducing the learning curve and accelerating functional maturity
- Vendors absorbing execution risk during the first 12–18 months through structured governance, compliance-ready processes, and transition management expertise that de-risks the ramp-up period and mitigates uncertainty risks
- From BOT/T to hybrid, JVs and managed services models, vendors offering commercial flexibility that aligns investment with maturity stages and de-risks capital commitments.

Outlook

Client priorities over the next 3-5 years are AI-first capability building, driving productivity from AI adoption, autonomous operations, platform engineering, and self-sustaining GCC models, with a focus on innovation and consolidation of the vendor footprint.

Productivity and outcome-led GCC operations powered by AI agents, GenAI copilots, and digital accelerators will become a mainstream driver within greenfield and brownfield GCCs. Vendors will differentiate through proprietary tools, pre-built IPs, AI platforms, industry-specific digital accelerators, pre-trained LLMs or SLMs for enterprise functions, and technology stacks to accelerate GCC maturity.

NEAT Methodology for GCC Services

NelsonHall's (vendor) Evaluation & Assessment Tool (NEAT) is a method by which strategic sourcing managers can evaluate outsourcing vendors and is part of NelsonHall's *Speed-to-Source* initiative. The NEAT tool sits at the front-end of the vendor screening process and consists of a two-axis model: assessing vendors against their 'ability to deliver immediate benefit' to buy-side organizations and their 'ability to meet future client requirements'. The latter axis is a pragmatic assessment of the vendor's ability to take clients on an innovation journey over the lifetime of their next contract.

The 'ability to deliver immediate benefit' assessment is based on the criteria shown in Exhibit 1, typically reflecting the current maturity of the vendor's offerings, delivery capability, benefits achievement on behalf of clients, and customer presence.

The 'ability to meet future client requirements' assessment is based on the criteria shown in Exhibit 2, and provides a measure of the extent to which the supplier is well-positioned to support the customer journey over the life of a contract. This includes criteria such as the level of partnership established with clients, the mechanisms in place to drive innovation, the level of investment in the service, and the financial stability of the vendor.

The vendors covered in NelsonHall NEAT projects are typically the leaders in their fields. However, within this context, the categorization of vendors within NelsonHall NEAT projects is as follows:

- Leaders: vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements
- High Achievers: vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet future client requirements
- Innovators: vendors that exhibit a high capability relative to their peers to meet future client requirements but have scope to enhance their ability to deliver immediate benefit
- Major Players: other significant vendors for this service type.

The scoring of the vendors is based on a combination of analyst assessment, principally around measurements of the ability to deliver immediate benefit; and feedback from interviewing of vendor clients, principally in support of measurements of levels of partnership and ability to meet future client requirements.

Note that, to ensure maximum value to buy-side users (typically strategic sourcing managers), vendor participation in NelsonHall NEAT evaluations is free of charge and all key vendors are invited to participate at the outset of the project.

Exhibit 1

'Ability to deliver immediate benefit': Assessment criteria

Assessment Category	Assessment Criteria
Offerings	GCC Advisory offerings GCC Setup offerings Greenfield GCC Transformation offerings Brownfield GCC Transformation offerings GCC support Services GCC Carve-out offerings
Delivery Capability	Depth of green-field GCC delivery capabilities Depth of brown-field GCC delivery capabilities Use of next-gen technology in GCC services Availability of proprietary tools Availability of partner ecosystem
Client Presence	Scale of client base: GCC setup Scale of client base: Transformation services Number of global/multi-country clients
Benefits Achieved	Level of cost optimization delivered Level of vendor consolidation delivered Extent of GCC setup and scaleup delivered Level of innovation and COE establishment delivered via GCC Level of talent management and productivity delivered AI and GenAI enabled benefits and outcomes delivered Level of successful transformation and transition delivered

Exhibit 2

'Ability to meet client future requirements': Assessment criteria

Assessment Category	Assessment Criteria
Investments	Investment in GCC setup and advisory capabilities Investment in GCC partner ecosystem building Investment in next-gen technology in support of GCC Investment in proprietary tools and frameworks in support of GCC Investments in IT and ER&D capability Investments in BPS capability building
Ability to Deliver Innovation	Mechanisms in place to deliver client innovation Extent to which client perceives outcome and transformation has been delivered Suitability of vendor to meet future needs of client Innovation in delivery management and engagement commercials
Partners & Technological Advancements	Existing partners and technology alliances Agility and investments towards strategic alliances and partnerships Ability to evolve services Perceived commitment to transformation
Market Momentum	Client wins in the past 12 months

For more information on other NelsonHall NEAT evaluations, please contact the NelsonHall relationship manager listed below.

reimagine.nelson-hall.com

Sales Inquiries

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:

Darrin Grove at darrin.grove@nelson-hall.com