KPMG

In collaboration with UnearthIQ

Making it matter: How GCCs Transform Capability into End-Patient Impact

Healthcare and Life Sciences GCCs: A Discussion Paper

February 2026

kpmg.com/in

KPMG. Make the Difference.

Contents

Foreword by KPMG in India

This discussion paper is an ongoing effort by KPMG in India to bring together end patient impact created by Global Capability Centers (GCCs) - particularly those based in India across pharmaceuticals, life sciences, health technology, and medical devices. For the purposes of this paper the term GCCs refers to and encompasses the deep capabilities that global organisations are building in India, across technology, R&D, engineering, core operations and other elements which are embedded at the core of global value chain.

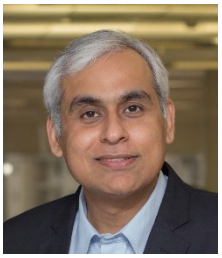
Healthcare and Life Sciences GCCs have entered a defining phase of their evolution. What began two decades ago as a model to deliver operational efficiency and cost advantage has matured into something far more consequential: a powerful engine for scientific innovation, digital transformation, and measurable patient impact.

India's role in this shift is especially pronounced. India's depth of talent, a steadily maturing healthcare innovation ecosystem, and a demonstrated ability to operate at global benchmarks of quality, compliance, and governance have positioned the country as a strategic hub for Healthcare and Life Sciences GCCs worldwide. Several Indian GCCs carry enterprise-wide mandates spanning R&D, regulatory operations, product engineering, and data platforms. This evolution reflects a structural re-architecting of global operating models rather than a cyclical sourcing trend.

What makes this report distinct is its focus on ***making the GCC impact visible***. Rather than viewing GCCs through a narrow operational lens, we highlight real examples of how capability transformation translates into tangible benefits—earlier access to treatments, safer clinical trials, faster time-to-market, more resilient supply chains, and scalable innovation across global healthcare ecosystems. The care pathways of the future are being shaped not only in laboratories and markets, but increasingly in GCCs that combine deep domain expertise with digital fluency.

KPMG in India collaborated with UnearthIQ to bring you this report. We are grateful to all the contributing GCCs for collaborating with us in curating relevant narratives that showcase the high-quality work being done from their centres in India and other parts of the world.

KPMG in India continues to collaborate with the Healthcare and Life Sciences GCC ecosystem in multiple ways, and we are proud to be playing a role in the ecosystem's success.



Akhilesh Tuteja
Partner and Head of Clients and Markets, KPMG in India

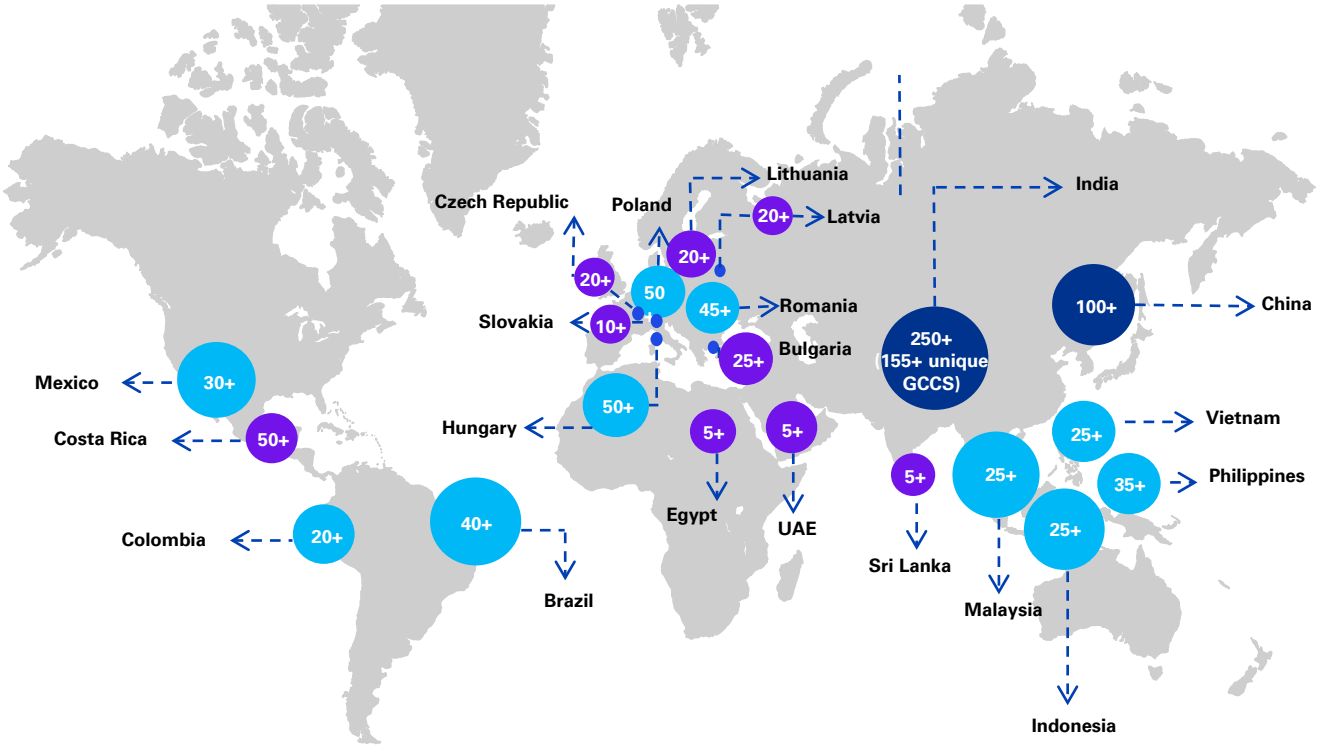
Vijay Chawla
Partner and Leader Life Sciences, KPMG in India

Shalini Pillay
Partner and Leader, Global Capability Centers KPMG in India

Kartik Ramakrishnan
Partner and Leader, Healthcare and Life Sciences GCC KPMG in India

When compared globally, India has a larger number of Healthcare and Life Sciences GCCs

Global Healthcare and Life Sciences GCC Landscape



Global distribution of healthcare and life sciences gcc units

- India provides scale and cost benefits, hosting over 150+ distinct Healthcare and Life Sciences GCCs, totaling more than 250 GCC units and employing around 300,0001 professionals across the healthcare sector
- China possesses Life Sciences R&D infrastructure and local innovation hubs in cities like Beijing and Shanghai. However, due to regulatory and geopolitical considerations, global companies primarily utilise China as a market-focused innovation center rather than a central global GCC
- Poland, Czech Republic, and Romania, along with Hungary, offer engineering expertise aligned with EU compliance standards. Poland has over 50 GCCs and technology centres, and an increasing portion of IT and R&D activities
- Eastern European countries such as Hungary, Czech Republic, Romania, Slovakia, and Bulgaria have EU-regulated clinical operations, quality management systems, analytics, and multilingual capabilities
- Costa Rica and Mexico serve as nearshore locations for North America, providing time-zone compatibility and language alignment. Costa Rica is notably strong in Medtech, supported by established manufacturing and engineering ecosystems.

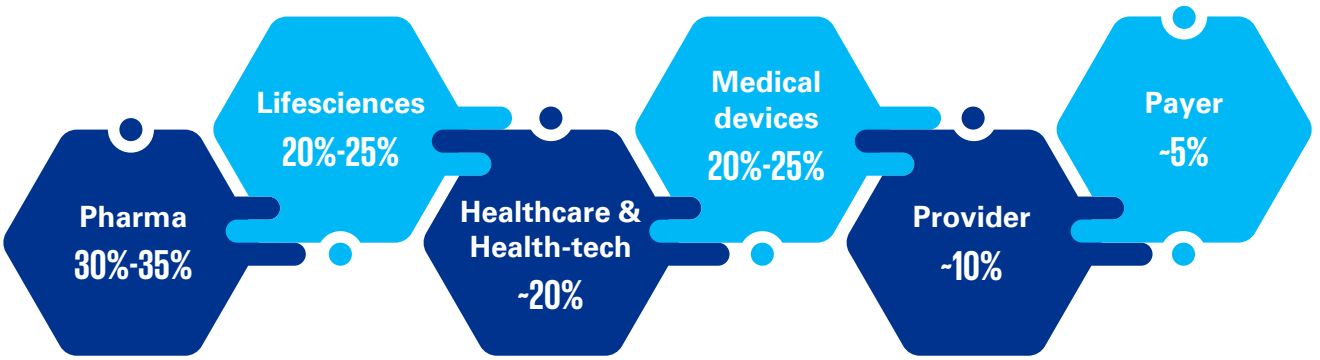
> "GCCs in India are evolving into digital innovation hubs that shape the future of healthcare. The AI driven, secure, and intelligence led operations are redefining how global organisations deliver outcomes. This transformation is creating measurable, sustainable patient impact at scale."
>
> **- Akhilesh Tuteja, KPMG in India**

Source: 1. UnearthIQ GCC Proprietary Database

Indian GCCs operate across segments of the Healthcare and Life Sciences spectrum

India houses 150+1 Healthcare and Life Sciences GCCs across key segments - GCCs include R&D Centres, Global Business Services Centres, Global Shared Services Centres and Centres of Excellence

Key segments of Healthcare & Life Sciences GCCs in India



Source: *UnearthIQ* GCC Proprietary Database & Primary Research, KPMG in India's analysis, 2026

Majority GCCs (~80-90%)[1] present in India today sit across pharma, life sciences and medical devices. GCCs are expanding their scope to support a wide spectrum of healthcare services and innovation. Key domains where healthcare GCCs now operate include:

- **Pharmaceuticals**
  Supporting drug discovery and development across the lifecycle, including AI-enabled target identification, clinical trial design, real-world evidence analytics, and regulatory strategy and submission support.
- **Life Sciences**
  Enabling end-to-end R&D workflows spanning genomics, biomarker research, translational medicine, and digital biomarkers, typically in close coordination with global R&D and medical functions.
- **Medical Devices**
  Contributing to the development of diagnostic and therapeutic solutions, including connected devices, imaging-led analytics, and digital therapeutics, with a strong emphasis on regulatory compliance, quality, and usability.
- **Health Technology**
  Building digital health platforms such as patient engagement solutions, population health tools, and interoperable health records to support improved access, efficiency, and outcomes across care settings.
- **Healthcare Providers**
  Enhancing hospital and clinical operations through digital platforms, clinical decision support systems, telemedicine enablement, and AI-driven diagnostics and workflow automation.
- **Healthcare Insurance and Claims**
  Supporting payer operations through analytics-led claims processing, fraud detection, prior authorisation automation, and insights to enable value-based care models.

Source: *1. UnearthIQ GCC Proprietary Database*

Detailed view into India Healthcare and Life Sciences GCC Landscape

India houses 150+ healthcare and life sciences GCCs across cities

2000s
Early movers

2010–2015
Mid-wave expansion

2015–2020
Rapid growth

2020–2025
Major players join

India healthcare and life sciences GCC

Healthcare and life sciences GCC industry is one of the largest within India GCC landscape

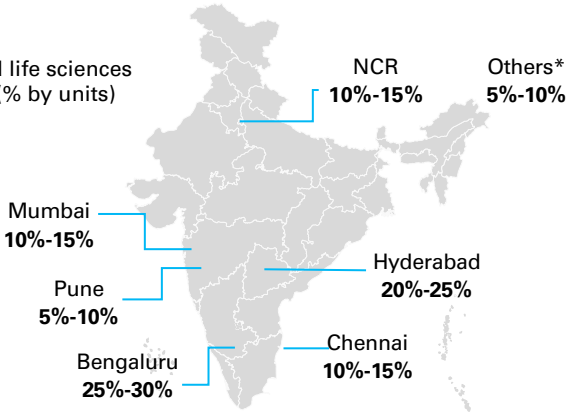
~150+
Established healthcare and life sciences GCCs

300K
Headcount across healthcare and life sciences GCCs

250+
Total no of GCC Units

> 40%
Lifesciences and pharma GCCs have their centres in 2 or more cities

Healthcare and life sciences GCC hotspots (% by units)



*Others include Trivandrum, Kolkata, Ahmedabad, Chandigarh/Mohali

Source: *UnearthIQ GCC Proprietary Database & Primary Research, KPMG in India's analysis 2026*

India's healthcare and life sciences GCC ecosystem has expanded to approximately 150+ centers employing around 300,000 professionals across pharma, Medical devices, healthcare, and life sciences sectors1, now entering a more advanced and strategic stage, with Bengaluru and Hyderabad leading the way. These cities have become premier locations due to their well-established technology talent pools, robust regulatory and data infrastructures, and close connections to innovation centres and academic institutions.

The ecosystem is also decentralising beyond the traditional Bengaluru–Hyderabad corridor, expanding into emerging hubs like Chennai, Pune, Ahmedabad, and Delhi NCR. This shift is fueled by objectives such as talent diversification, cost efficiency, and enhanced operational resilience.

Currently, over 40%1 of multinationals operate multi-city hub models, leveraging location-specific expertise - such as digital health, clinical operations, engineering, and regulatory services - to optimise scale, mitigate risk, and deepen domain knowledge within their global frameworks.

> *"By leveraging India's deep talent pool in data science and life sciences, GCCs are reducing healthcare costs while improving treatment accessibility for underserved populations globally.*
>
> *The strategic positioning of these centres enables pharmaceutical companies to reinvest savings into R&D, ultimately translating into breakthrough therapies that extend and enhance patient lives across emerging and developed markets."*
>
> **- Mrinal Duggal, Head of Sanofi Global Services, Hyderabad Hub**

Source: 1. UnearthIQ GCC Proprietary Database

Prominent healthcare and life sciences clusters have supported the ecosystem

India's position as a strategic hub for healthcare and life Sciences GCCs continues to strengthen, anchored by Bengaluru and Hyderabad. India's healthcare and life sciences landscape is increasingly characterised by a cluster-based ecosystem, combining scale, maturity, and emerging innovation capabilities. Established clusters (such as Genome Valley in Hyderabad) in vaccines and biopharma manufacturing reflect the benefits of long-term ecosystem development, including talent density, global regulatory alignment, and rapid operationalisation, which together have supported the growth of India as a reliable manufacturing and innovation base.

Genome Valley - "Vaccine capital of the world / Pharmacy of the world"

Journey

1999 - 2005 Foundation and establishment	2006 - 2014: Growth and consolidation	2015 – 2019: Scale-up and infrastructure boom	2020- - 2023: COVID-19 era and global validation	2024 Onwards: Innovation pivot and capability expansion
Birth of Asia's first organized life sciences cluster	Manufacturing momentum and global recognition	The manufacturing powerhouse emerges	The vaccine capital ascends	From manufacturing hub to innovation ecosystem

- **Geographic footprint –** 2000 Acres spanning multiple knowledge parks, SEZs, incubation hubs, multi-tenanted lab & R&D spaces.
- **Healthcare companies –** 200+ life-sciences companies from ~18 countries; substantial base of big pharma, vaccine makers, CROs, CDMOs, biotechs
- **Total employees –** 25000+
- **Speed –** 3-5 months to operational
- **Quality -** GMP, FDA, WHO-prequalified
- **Innovation -** CGT, bioprocess, gene therapy (emerging
- **Cluster positioning -** End-to-end R&D + manufacturing + scale-up hub; heavy in vaccines, generics, biosimilars, bulk drugs; globally recognised life-sciences cluster
- **Typical firm "fit" today -** Large vaccine/pharma manufacturers, CDMOs, global CROs, mid-large biotechs, plus R&D-heavy MNCs looking for scale lab + light-mfg infrastructure and integrated ecosystem.
- **Maturity / risk profile -** Low ecosystem risk, high proof-points – cluster is proven; infra & regulatory mechanisms tested; costs and benchmarks reasonably well-understood.

Source: *National Industry Reports and Cluster Benchmarks*

In parallel, **newer innovation clusters (such as BLR district)** illustrate the evolution of Indian healthcare hubs toward integrated, campus-style models. These developments signal a shift from traditional research and IT concentration toward lab-ready, sustainability-aligned environments capable of supporting discovery, pilot-scale activity, and selective manufacturing within a single, integrated footprint.

Emerging hubs: Beyond the primary hubs, several Indian cities have developed healthcare and life sciences GCC ecosystems with differentiated capability strengths that contribute to global pharmaceutical and healthcare innovation. Across major metropolitan regions - such as the Mumbai-Navi Mumbai corridor, Pune, Chennai, and Delhi-NCR—GCCs support a range of mandates spanning R&D, regulatory operations, digital health, advanced analytics, and CRO-linked research, reflecting varying stages of ecosystem maturity.

Collectively, India's combination of mature, developing, and emerging clusters creates a diversified and resilient GCC landscape. This enables healthcare and life sciences organisations to make deliberate location choices aligned to strategic priorities—such as discovery, digital innovation, regulatory excellence, and platform-based research—while balancing scale, specialization, and risk across their global operating models.

Healthcare and life sciences GCCs are shifting the traditional maturity curve

Evolving beyond the traditional maturity model:

The healthcare and life sciences GCC sector is experiencing a significant transformation, shifting focus from transactional cost-efficiency to strategic value generation. Established GCC operations have evolved over several decades, gradually advancing from basic support roles to spearheading global initiatives in clinical trial design and drug discovery. Conversely, newer GCC setups are skipping the conventional maturity progression by adopting a "Core-First" approach from inception. These advanced centres encompass complex capabilities such as AI-powered molecular modeling, medical device development, patient-focused digital health solutions, and automated, technology-driven support functions.

By integrating the full value chain—from research and development to commercial analytics—these organisations are moving beyond being satellite offices to become digital hubs that drive innovation, shorten clinical development timelines, and have a direct impact on global patient care outcomes.

Evolution of healthcare and life sciences GCCs in India

From support-led growth to core-first innovation

The evolutionary path (Traditional GCCs)

Long-standing players in pharma and medical devices that scaled over decades

2010s-Present — Phase 3
Focus: Strategic ownership
Functions: : Drug discovery, clinical trial design, AI-led commercial analytics

2000s-2010s — Phase 2
Focus: Capability expansion
Functions: : Added supply chain, pharmacovigilance, regulatory submissions and customer support

1990s-2000s — Phase 1
Focus: Foundational support
Functions: IT helpdesk, payroll, accounts payable, data entry

- **Top global pharmaceutical company and global diabetes and metabolic leader :** Moved from data entry to leading global drug safety and clinical data science.
- **Global medical devices major:** Evolved from basic CAD drafting to high-end product engineering.
- **Leading global healthcare services organisation:** Scaled over a decade to become a massive global technology engine.

The core-first approach (Newer GCCs)

Pharma, Healthtech, and medical devices established in the last 5 years

Strategic core and value hub

R&D
AI-driven molecular modeling and genomics

Digital Health
Patient-facing apps and remote monitoring software

Support 2.0
AI and automation to handle finance, HR, and IT

Cybersecurity
Protecting sensitive patient data

Data Science
Predictive analytics for clinical outcomes and real-world evidence (RWE).

Accelerated value

- **Leading global biopharma company and global biotechnology major:** Launched with "Digital Hubs" for high-end R&D and data science from the start.
- **Leading global medical devices company:** Established in India with a focus on core engineering and software-defined medical tech.
- **Large US healthcare provider:** Setup focused immediately on clinical innovation and data-driven care delivery.

Source: *UnearthIQ GCC Proprietary Database & Primary Research, KPMG in India's analysis 2026*

> "The next phase of evolution of the GCC model, as it moves up the maturity curve will be driven by the business context and core sector/domain knowledge. Leveraging emerging technologies & GenAI to impact the core sectoral challenges is what will drive significant outcome and truly unlock the RoI. The GCCs, technology and innovation hubs focused on streamlining the underlying data structures, integrating technology across the core value chain, investing in techno-functional capabilities, and leveraging the wider ecosystem to fuel research and innovation, will pave the way forward for global Healthcare and Life Sciences players"
>
> **- Shalini Pillay, Partner and India Leader – Global Capability Centres, KPMG in India**

Wider ecosystems are empowering GCCs to innovate through diverse partnerships

GCCs in India are transforming beyond traditional cost arbitrage frameworks into full-fledged innovation hubs by building multi layered ecosystems through startup accelerators, academic collaboration, government partnerships, hospital alliances and integration with industry clusters. This is a critical pivot; the ecosystem model removes the 'Tech' and Functional' silos, organically building deep capabilities that was previously thought to be exclusive to the global headquarters. The exposure to clinical, regulatory and patient constraints augments deep domain knowledge enabling techno-functional talent.

GCCs now cover the complete value chain, moving from delivering work to owning outcomes. This is a structural departure from traditional GCC models to engineering multi layer ecosystem platforms that collapse distance between scientific discovery and patient outcomes.

The ecosystem supporting GCCs benefits from strong government backing, state-level policies and incentives, and an increasingly favorable business environment that continues to improve over time.

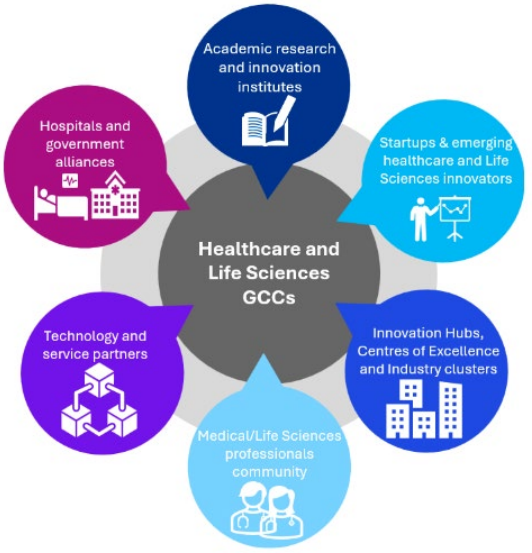
India's healthcare and life sciences GCC landscape has matured into a sophisticated, enterprise-level innovation platform composed of five closely integrated partner layers

A GCC of a leading pharmaceutical company partnered with 10 AI startups enabling their internal regulatory experts to work shoulder to shoulder with AI engineers to validate algorithms, building functional expert capabilities who know how to train, audit and deploy LLMs for submission process

A German medtech company entered partnerships with academia and hospitals to augment digital healthcare capabilities at its innovation center in India

A GCC of multinational pharmaceutical company created a solution accelerator program to focus on mixed reality technologies and SLMs for healthcare including PoC development

A biopharmaceutical company GCC integrated academic research by co-developing a university curriculum to create a bidirectional talent pipeline.



Source: *UnearthIQ GCC Proprietary Database & Primary Research, KPMG in India's analysis 2026*

> "The thriving business ecosystem supporting GCCs plays a proud role in enabling expertise and talent for GCCs in areas like Data Analytics, Taxation, Risk, Regulatory compliance, Technology, Operations support, and even R&D, among others. In addition, startups, Academia, and other platforms enabled by local state governments and private players infuse fresh thinking, talent, and innovation. But what truly sets the GCC ecosystem apart is its collaborative and inclusive nature - GCCs actively encourage newcomers and openly share their experiences. This openness significantly enriches the entire ecosystem in unique and valuable ways."
>
> **- Kartik Ramakrishnan, Partner and KPMG in India leader for Healthcare and Life Sciences GCC**

Pharma and life sciences value chain

The Pharma and life sciences industry value chain represents a multifaceted ecosystem, covering essential processes from discovery and development through manufacturing, supply chain management, commercialisation, and post-market support, all supported by critical enabling functions such as corporate services, human resources, infrastructure, IT, and operational support.

A significant transformation is taking place as GCCs integrate AI, machine learning, data analytics, and cloud technologies into key areas. This integration accelerates drug discovery through bioinformatics, automates regulatory compliance to streamline submissions, enhances manufacturing efficiency with predictive quality controls, and strengthens supply chain resilience via real-time forecasting. Driven by digitally skilled talent pools and agile operational models in hubs like India, GCCs are evolving into co-innovators, delivering comprehensive value amid the challenges of personalized medicine, regulatory demands, and supply chain disruptions.

Pharma and life sciences value chain

Primary functions

R&D and preclinical development	Clinical trials and development	Regulatory compliance	Manufacturing and supply	Marketing, sales and post-market surveillance
• Target identification • Drug research and discovery • Lead optimisation • Preclinical studies • Toxicology	• Phase I–III trials • Biometrics • Data management • Pharmacovigilance	• Dossiers • Compilation and submission • Compliance management • Pricing and reimbursement • Health economics	• API and formulation manufacturing • Quality control/assurance • Packaging • Distribution planning and analysis	• Brand strategy • Marketing and sales • Key account management medical affairs • Real-world evidence • Post-market surveillance

Margin

Support functions

Finance and Legal	Finance, Accounting, Tax, Legal, Risk, Internal audit, Investor relations
HR and Marketing support	HR, Talent Acquisition, Learning, Facilities, Corporate communications
IT & Emerging technologies	Planning, Design and implementation, Application development and maintenance, Infrastructure management, Security, RPA, Cloud platforms, Data engineering, Analytics, AI/ML platforms, Digital workplace, Blockchain, IoT, Mobility, AR/VR, 3D Printing
Operations support	Procurement, Vendor management, Marketing, Sales, Logistics Coordination, Customer Service, Compliance and regulatory support, EHS, ESG, Sustainability

Margin

Source: *UnearthIQ GCC Proprietary Database, KPMG in India analysis 2026*

> "India has earned its place as the strategic hub for global transformation. GCCs will shape discovery, influence regulatory pathways, and accelerate product innovation, making India indispensable to the future of Life Sciences.
>
> **- Vijay Chawla, Partner and Leader Life sciences, KPMG in India**

Technology innovation driving speed, safety and access across the value chain

Tech innovations impact across pharma and life sciences value chain (India GCCs)

Low · Average · Good · Very Good · Excellent

	R&D and preclinical development (60% penetration)	Clinical trials and development (60% penetration)	Regulatory compliance (55% penetration)	Manufacturing and supply (45% penetration)	Marketing, sales and post-market surveillance (60% penetration)
AI/ML for discovery and development Drug discovery; Small-molecule design; Personalised treatment	Very Good	Good	Average	✕	✕
RPA/Automation Real-time monitoring of patient data,Clinical Trials Management, Patient Matching	Good	Very Good	Good	✕	✕
Advanced imaging and diagnostics Medical imaging and AI; Fluorescence imaging; Advanced medical devices	Very Good	Very Good	✕	Good	Good
Omics, molecular testing and genomics Molecular testing and genomics; Predictive & personalised-health analytics platforms	Very Good	Good	✕	✕	Average
Big data, analytics and AI platforms Big data and analytics; Advanced commercial analytics and omnichannel engines	Very Good	Good	✕	✕	Very Good
eClinical and trial-operations tech Digital / decentralized clinical-trials platforms; AI-optimised trial design and sample size	✕	Very Good	Good	✕	✕
Digital manufacturing and supply-chain tech Digital-twin models for plants & processes; AI & IoT-enabled smart pharma logistics	✕	✕	Good	Very Good	✕
Core digital infrastructure and cybersecurity Healthcare IT and cloud infrastructure; Cybersecurity & data-governance frameworks	Very Good	Very Good	Very Good	Good	Very Good

Source: *UnearthIQ Analysis*

Technologies in R&D and preclinical stages are already making a significant impact as AI/ML, genomics, advanced imaging, and data platforms integrate to enhance target identification, molecule design, and biomarker discovery. GCCs must develop cross-functional teams and scalable AI and analytics frameworks that can be applied across various assets and therapeutic areas, facilitating more precise treatments and accelerating the progression of promising candidates into clinical trials.

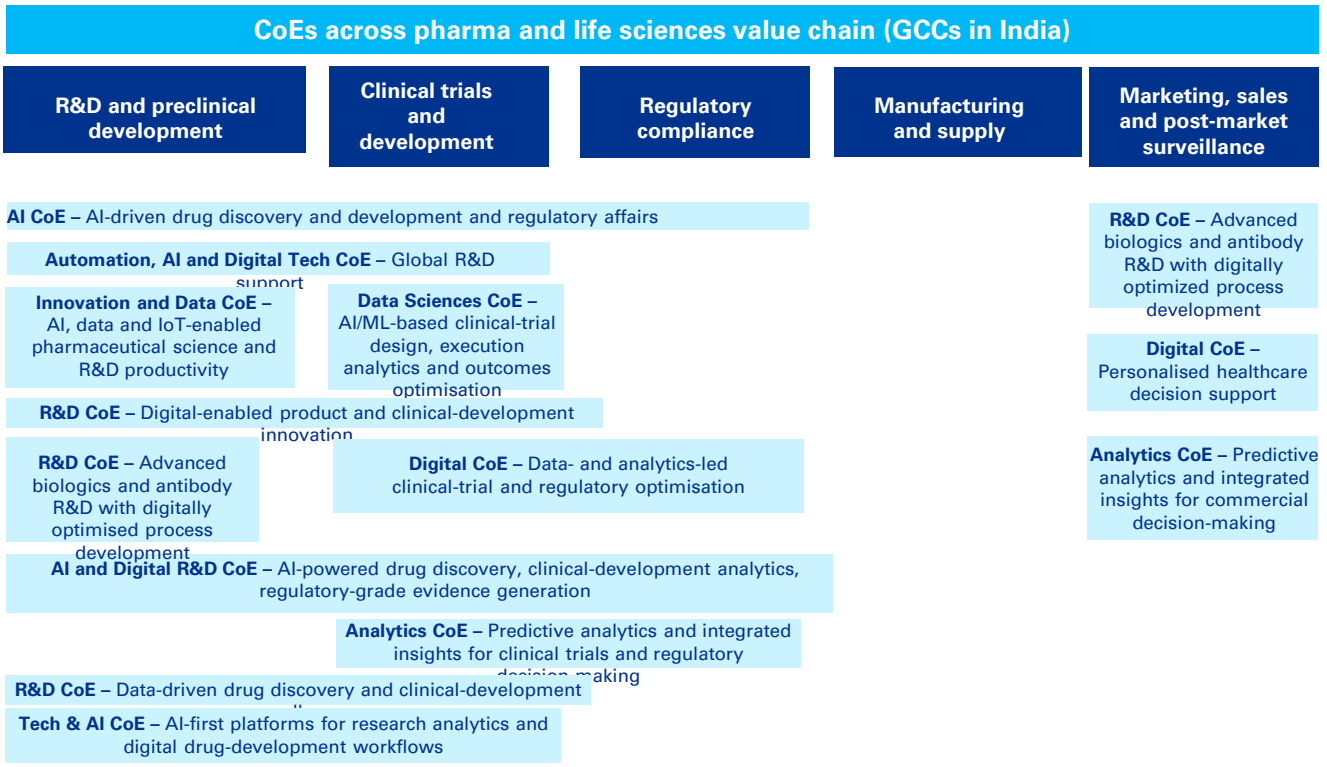
Within clinical trials, AI/ML, eClinical platforms, RPA, and big data support decentralised trial models, adaptive designs, and more effective management of sites and patients. GCCs have the potential to function as global trial command centers, optimising protocol development, participant recruitment, and safety monitoring, while providing patients with easier hybrid access, improved trial matching, and enhanced safety oversight.

Regulatory and post-market stages depend heavily on big data, AI, and digital infrastructure for safety analytics, real-world evidence generation, and continuous monitoring. GCCs could take ownership of regulatory data platforms and automate submissions, reducing approval timelines and enhancing ongoing risk-benefit evaluations, thus enabling earlier patient access to new therapies and more proactive identification of adverse events.

In manufacturing and supply, the adoption of digital plants, advanced supply-chain technologies, and cybersecurity measures can be supported by GCCs to enable predictive, interconnected operations that minimise stockouts and quality issues, thereby improving the reliability of medicine availability.

Together, these developments position India-based GCCs as comprehensive innovation hubs throughout the drug development lifecycle, significantly shortening discovery-to-delivery timelines while enhancing safety, accessibility, and patient outcomes.

Technology enabled CoEs are changing drug development outcomes



- The entire drug development cycle is typically 10-15 years long.
- Average cost is USD1Bn
- Out of every 10,000-15,000 new compounds identified during discovery, five are considered safe for testing in human volunteers. Only one of these compounds is typically approved as a marketed drug

Source: *UnearthIQ analysis*

Pharmaceutical and life sciences organisations are establishing specialised Centres of Excellence (CoEs) throughout every phase of the drug development value chain, ranging from research and preclinical activities to clinical trials, regulatory affairs, manufacturing, and commercialisation. These CoEs are deeply rooted in AI, data science, automation, and digital platforms. Notably, there is greater adoption in regulatory compliance and marketing/safety areas where analytics and real-world evidence play a vital role.

For GCCs, this represents a clear transition from traditional IT and operational roles to high-value, domain-specific capabilities such as AI-driven drug discovery, trial analytics, digital regulatory management, and commercial intelligence. GCCs that prioritise developing cross-functional expertise - encompassing data scientists, clinicians, and regulatory specialists - and invest in integrated AI and analytics platforms can effectively manage these CoEs on a global scale, positioning themselves as true R&D and innovation hubs rather than support centers.

> "The technical capabilities, digitisation platforms and the talent at scale at the capability center directly impact our ability to develop solutions faster, creating value for patients. Various functions being co-located here allow collaboration, joint problem-solving with complementary capabilities and foster innovation. Beyond cost savings, the value lies in creativity, innovation, and speed to market. "
>
> **- Mukta Arora, MD and head of Astellas Pharma GCC**

GCCs are shifting the narrative to product velocity and scalable innovation

India's pharma and life sciences GCCs are driving significant reductions in drug development timelines and costs by leveraging AI, automation, and advanced analytics across the value chain. From faster protein design in preclinical stages to improved patient recruitment and trial execution, these centres systematically eliminate operational bottlenecks—shortening regulatory documentation and approval cycles that previously extended over months.

The real game-changer is the efficiency gained, which frees R&D teams from routine tasks and redirects talent toward bold, high-impact innovation. Proven results from front-running organisations confirm that these efficiencies are delivering tangible, real-world outcomes.

For patients, the impact is profound: therapies reach clinics faster, trial success rates climb, and cost savings translate to more affordable medicines. Breakthroughs in oncology, rare diseases, and chronic conditions arrive sooner, saving lives and easing burdens—proving India's GCCs aren't just cost centers, but global health accelerators driving equitable, rapid innovation.

Impact of GCCs on pharma and life sciences value chain

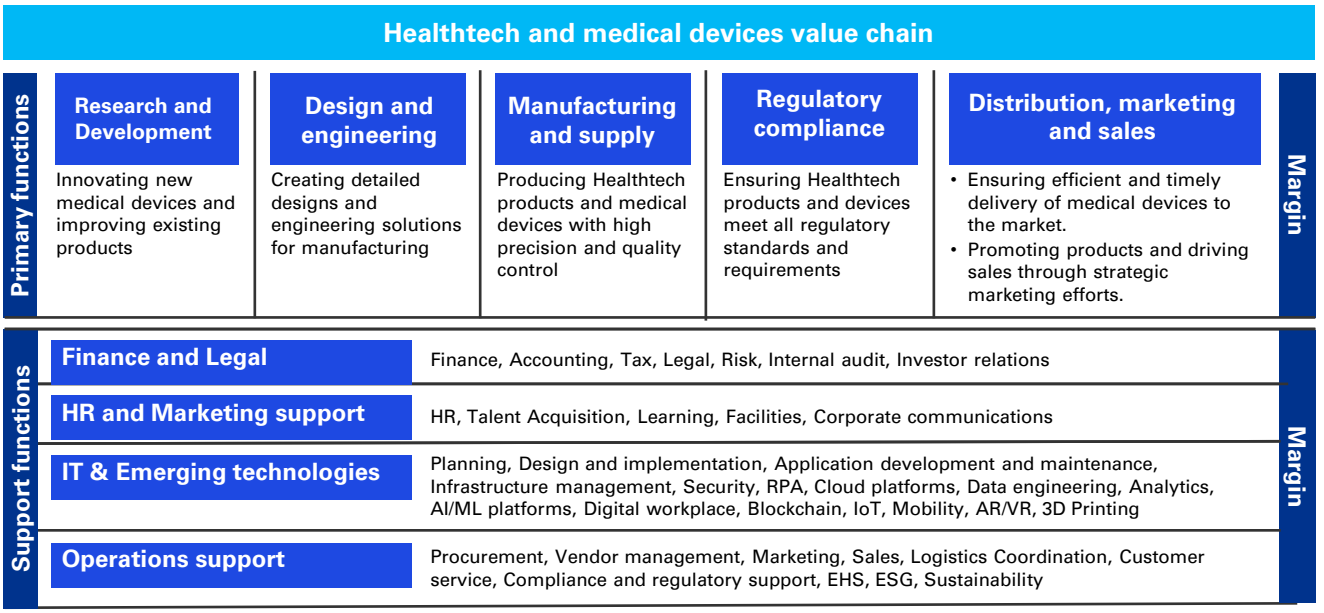
Faster, Leaner, Smarter: GCCs cut drug timelines (10–15 → 9–13 years) and lower R&D to launch costs (20–30% → 15–25%)

Typical time/cost range
GCC Impact

	R&D and preclinical development	Clinical trials and development	Regulatory compliance	Manufacturing and supply	Marketing, sales and post-market surveillance
Time taken Cost incurred	**4-8 years USD100-500M**	**6-7 years USD500M-$1.5B**	**0.5-2 years USD2-10M**	**1-2 years USD50-200M**	**Ongoing USD300-500M**
	5-6 years $80-400M	**4-6 years $400M-$1.2B**	**0.4-1.5 years $1.8-9M**	**No Direct impact** (enablement and support)	**No Direct impact** (enablement and support)
GCC cost impact stories	Global biopharma leader achieves **20-30% R&D cost reduction** via AI/ML and supply chain analytics.	Global biotherapeutics leader achieves **45% operating cost reduction & 32% fewer clinical tests** via AI-led digital trials. Global biopharma leader **improves late-stage trial success rates** via AI/ML and supply chain analytics. Global life sciences conglomerate **accelerates Phase III/IV trials** via AI in clinical trials.	Top global pharmaceutical company **reduces inspection observations to zero** via AI-driven validation and GxP compliance. Top research-driven pharma company **reduces documentation time from 8 months to 1 month** via AI bots. Top global pharmaceutical company **boosts right-first-time data packages from 72% to 96%** via central Data Quality Operations hub and Clinical Data Interchange Standards Consortium standards. Top global pharmaceutical company **cuts cycle time from 14 days to 3 days (79% reduction)** via automated pipelines and submission workbench. Global diabetes & metabolic leader **slashes document processing from 40 hours to 40 minutes** via AI.	Top research-driven pharma company achieves **97% accuracy** via AI bots. Global healthcare leader **delivers USD 0.5B impact** via intelligent automation. Top research-driven pharma company **cuts purchase requisitions into purchase orders turnaround time by 60%** and **improves external vendor on-time delivery from 83% to 93%** via AI bots. Global healthcare leader **achieves faster, more accurate invoice-to-cash and reduces plant-level downtime and waste** via intelligent automation.	Top research-driven pharma company achieves 97% accuracy via AI bots. Global healthcare leader delivers USD 0.5B impact via intelligent automation. Top research-driven pharma company achieves 97% accuracy via AI bots. Global healthcare leader delivers USD 0.5B impact via intelligent automation.
GCC time impact stories	Global biopharma leader **accelerates 70% projects** via AI drug design platform Leading biotech company **designs therapeutic proteins faster** via AI/ML. Global vaccines & pharma leader **speeds up R&D by 30-40%** via AI for protein modelling.	Global biotherapeutics **leader improves patient recruitment by 28%** via AI-led digital trials. Global diabetes & metabolic leader **saves 80% clinical trials/protocols time** via AI tools. Clinical technology & eHealth provider **cuts clinical protocol capture time by 30%** via Gen-AI tool. Leading biotech company **expedites innovative therapies delivery** via AI/ML in clinical trials.			

Source: *UnearthIQ Analysis and KPMG in India's analysis 2026*

Healthtech and medical devices value chain



Source: *UnearthIQ GCC Proprietary Database, KPMG in India analysis 2026*

Impact of GCCs on pharma and life sciences value chain

The Healthcare and medical devices value chain constitutes a highly regulated, innovation-centric ecosystem encompassing stages from product ideation, design, clinical validation, regulatory approval, manufacturing, commercialisation, to post-market surveillance. This ecosystem depends heavily on digital platforms, robust data infrastructure, cybersecurity measures, and global operational capabilities. With an increasing focus on outcomes-based care, digital therapeutics, connected devices, and personalised treatments, the value chain is undergoing rapid transformation.

Global Capability Centers (GCCs), particularly those in India, have evolved from primarily cost-efficient IT units into strategic innovation hubs closely integrated with product development. They capitalise on expertise in biomedical engineering, software architecture, data science, and regulatory technology to participate fully across the device and digital health lifecycle.

GCCs are at the forefront of AI-driven product design, utilising digital twins, simulation validation, and human-factors engineering. They also facilitate remote clinical trials, generation of real-world evidence, and AI-enhanced diagnostics, thereby accelerating market entry while improving trial efficiency and participant diversity.

The regulatory and quality assurance domains benefit from automated regulatory intelligence, electronic quality management systems, and AI-powered submission workflows compliant with FDA, MDR, and ISO standards. These capabilities reduce compliance risks and approval timelines while maintaining continuous readiness.

Within manufacturing and supply chain management, GCCs support Industry 4.0 initiatives such as predictive quality analytics, IoT-enabled smart factories, and demand-sensing platforms, enhancing supply chain resilience amid geopolitical and logistical challenges. Post-market activities include managing connected-device monitoring, adverse event detection, cybersecurity, and real-time product analytics to ensure ongoing safety and compliance.

Beyond operational roles, GCCs co-own global product strategies, develop cloud-native health platforms, device software ecosystems, interoperability standards like FHIR and HL7, and AI/ML models that drive revenue. Their adoption of agile methodologies, product-centric funding, and close collaboration with global R&D and business units has elevated GCCs from execution centers to essential innovation partners.

Technology innovation impacting end-to-end product lifecycle outcomes

Tech innovations impact across Healthtech and medical devices value chain

Tech innovations impact across healthtech and medical devices value chain

Low · Average · Good · Very Good · Excellent

	Research and Development	Design and engineering Indicative ~75–85%	Manufacturing and supply Indicative ~45–60%	Regulatory compliance Indicative ~30–45%	Distribution, marketing and sales Indicative ~40–55%
AI/ML for device intelligence Embedded AI, imaging analytics, decision support					
Digital health platforms and RPM Remote monitoring, app ecosystems, digital therapeutics				✕	
Connected devices and interoperability IoT/5G, FHIR/HL7, device cloud, APIs					
Cybersecurity, privacy and governance Secure-by-design, threat modeling, compliance controls					
Advanced sensors and wearables Biosensing, continuous monitoring, edge analytics					
Robotics and automation Surgical robotics, automation, haptics, autonomy					
Digital quality & regulatory tech eQMS, eIFU/UDI, submissions, audit readiness					
Digital manufacturing and supply chain Digital twin, additive mfg, predictive quality					✕

Source: *UnearthIQ Analysis*

India's GCC ecosystem is shifting from traditional engineering-led support roles to software-centric, data-driven ownership models that significantly impact product velocity, scalability of compliance, and post-market performance. This transformation is most evident in software platforms and product engineering, where GCCs are taking on full responsibility for end-to-end lifecycle management, enabling quicker iteration cycles and enhanced global reuse of digital assets. These changes are driving tangible reductions in time-to-market. Improved integration between R&D, validation, and regulatory processes is minimizing development bottlenecks, while greater automation in documentation, testing, and quality assurance is shortening regulatory timelines that previously lasted several months.

Consequently, organizations are increasing portfolio throughput without corresponding rises in cost or risk. Post-launch, GCCs are playing a pivotal role in continuous product monitoring and lifecycle management. Centralized analytics, remote device tracking, and real-world evidence collection are boosting product reliability, facilitating earlier identification of performance issues, and enabling more proactive regulatory and safety interventions.

This evolution from reactive support to ongoing stewardship is enhancing clinical outcomes and strengthening brand reputation. At the enterprise level, GCCs are becoming key drivers of operational leverage. Through platform standardization, industrialization of quality and compliance workflows, and consolidation of digital ownership, organizations are realizing scale efficiencies while bolstering resilience across global product lines. Although physical manufacturing remains regionally based, digital governance of product intelligence, compliance coordination, and post-market surveillance is increasingly centralized within GCCs. This strategic allocation emphasizes areas where software scalability, talent optimization, and global reuse deliver the greatest long-term value.

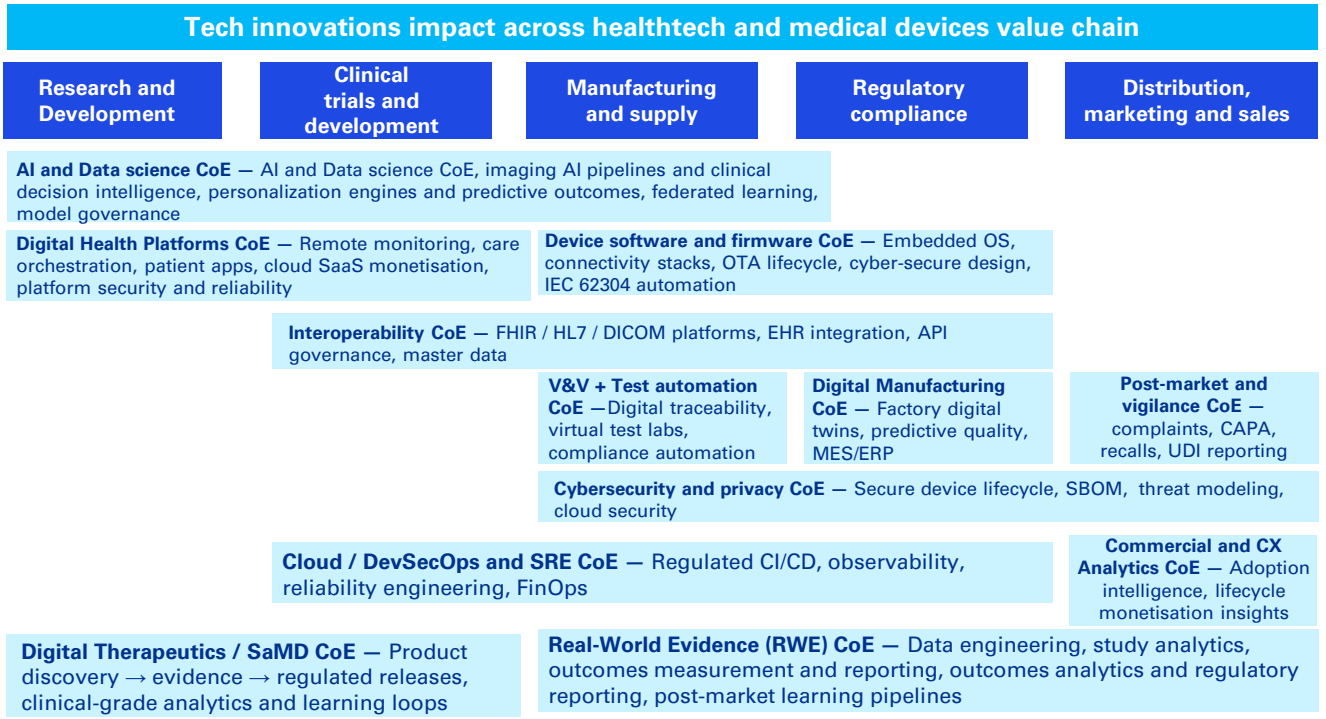
Growing presence of CoEs driving ownership across the value chain

Healthcare and medical devices companies are evolving their India GCCs into specialised product-focused Centers of Excellence (CoEs) covering the full product lifecycle, from engineering and AI diagnostics to regulatory automation and digital platforms.

India GCCs are transitioning from generic IT services to innovation hubs emphasizing domain expertise and IP creation, managing global product roadmaps, reusable platforms, validation automation, and analytics IP across multiple CoEs while ensuring regulatory compliance and patient safety.

Top GCCs integrate diverse skills—biomedical engineers, embedded architects, cloud engineers, data scientists, clinical, cybersecurity, and regulatory experts—supported by AI platforms, DevSecOps, digital validation, and automation, positioning India as a global healthcare and Mmedical devices innovation centre.

Representative CoEs across healthTech and medical devices value chain in India



- India healthcare GCC ecosystem: India hosts 100+ healthcare GCCs with rapidly rising AI penetration (>85%). Leaders are shifting GCCs from delivery hubs to product-aligned CoE platforms owning IP, regulatory scalability and lifecycle economics. Winning firms fund GCCs as product factories, not cost centers.
- AI/ML involvement in Healthcare GCCs increased from 65% (2019) to 86% (2025). GCCs increasingly deliver advanced digital mandates (e.g., digital therapeutics, real-world evidence analytics) and deical device software/cybersecurity programs.
- CoEs shown are illustrative "capability building blocks" observed across public reports/case studies; actual CoE portfolios vary by company and regulatory footprint.

Source: *UnearthIQ Analysis*

> "In healthcare and life sciences, the next wave of digital transformation will be AI-native, with intelligence embedded across R&D, regulatory, quality, and product engineering workflows. This evolution supports GCCs in moving beyond traditional delivery metrics toward stewardship models that enable scale, improve cycle times, and accelerate the delivery of impact to market."
>
> **- KG Purushothaman, Partner & Head of Technology Transformation and AI, KPMG in India**

GCCs are changing the narrative by delivering faster, leaner and smarter product lifecycle

Impact of GCCs on healthtech and medical devices value chain

Impact of GCCs on healthtech and medical devices value chain

Faster, Leaner, Smarter: GCCs compress device development cycles (5–8 → 3–5 years) and improve software-led margin leverage (10–15% → 18–25%)

Typical time/ cost range
GCC impact

	Research and Development	Design and engineering	Manufacturing and supply	Regulatory compliance	Distribution, marketing and sales
Time taken Cost incurred	3-5 years USD30-120M	2-4 years USD15M-60M	0.5-2 years USD2-10M	1-2 years USD20-100M	Ongoing USD50-200M
Time saving Cost saving	20–35% faster design cycles	30–50% faster software releases	40–60% validation automation	10–20% yield improvement	20–30% service productivity
GCC cost impact stories	• 30–40% rework reduction • AI-driven simulation and design reuse • 30–50% reduction in development costs	• Higher uptime and OTA velocity • Platform reuse	• Supply resilience • ~60–70% lower product cost	• Predictive quality • Shorter approval cycles • Audit readiness	• Remote monitoring monetisation • Installed-base analytics
GCC time impact stories	• Imaging leader reduces design iterations by 35% via AI simulation • Wearables firm accelerates edge algorithm tuning by 40%	• Platform team cuts release cycles from quarterly to monthly • OTA automation improves uptime by 25%	• Digital twin improves yield by 18% • Downtime reduced by 22%	• Submission prep reduced from 6 months to 6 weeks • Manual validation reduced by 55%	• Remote services grow revenue by 30% • AI triage cuts response time by 40%

Source: *Internet sources, Company Websites, UnearthIQ Analysis and KPMG in India's analysis 2026*

Healthcare and Medtech Global Capability Centers (GCCs) in India are transitioning from traditional engineering delivery hubs to innovation-driven centers focused on product development, encompassing AI platforms, regulatory automation, cybersecurity, and digital health monetization. Industry leaders are showcasing accelerated product development cycles alongside scalable compliance frameworks.

A prominent global healthcare technology firm exemplifies India-led Medtech innovation with its ultra-portable ECG device, entirely conceptualized, engineered, sourced, and manufactured at its Bengaluru R&D center. Designed specifically to overcome challenges prevalent in emerging markets—such as unstable power supply, limited access to cardiologists, and high equipment costs—the battery-powered, lightweight device is priced at approximately one-third of imported alternatives. This affordability enables general practitioners in rural areas to perform ECGs effectively. With over 7,500 units sold worldwide, including more than 2,000 in India, the platform has since evolved to include even more cost-effective variants. This achievement highlights the role of India-based R&D and GCCs in driving reverse innovation, expediting product development, lowering costs, and establishing India as a global hub for Medtech product innovation and lifecycle management. This successful model has spurred increased investments from numerous global Medtech leaders in Bengaluru and Hyderabad, expanding capabilities in engineering, research, and full product ownership, thus reinforcing India's position as a strategic center for scalable healthcare technology solutions.

These developments signal a broader trend of India becoming a central hub for global product ownership, fostering scalable innovation, optimizing costs, and delivering sustained value across healthcare technology portfolios.

This discussion paper has been developed through multiple dialogues with a diverse group of industry leaders spanning pharmaceuticals, life sciences, health technology, and medical devices, many of whom oversee substantial segments of their global R&D, product engineering, and digital platforms from India.

The initial sections of this paper outline the landscape facilitating the transformation of GCCs into enterprise-critical hubs. They illustrate how GCCs within the sector have become integral to global value chains—a structural change reflecting the redesign of global operating models, where capability ownership and accountability are increasingly centered in India.

Building upon this foundation, the subsequent section offers a series of select industry case studies that demonstrate this transformation.

Case Study 1

Novo Nordisk GBS supported in accelerating oral Wegovy® from trial to submission readiness in record time in the US, delivering a convenient pill therapy with efficacy comparable to injectable Wegovy® for patients worldwide

How the GCC enabled this impact

Project leadership (End-to-end project delivery including biostatistics, clinical data scientists, clinical data management, lead medical writer and regulatory lead)

24/7 Operations (Hybrid collaboration)

Manufacturing Capacity Planning (Post-launch continuity)

Strategic partnership (Design, analysis and interpretation of clinical trials,medical writing activities, submission strategy, QnAs, publications)

Health authority management (Submission readiness, authority query resolution including proactive Q&A preparation)

Outcomes and value delivered

- **Regulatory readiness:** Regulatory submission package prepared in 12 days post-LPLV versus six+ months
- **Improved patient reported outcomes:** Comparable efficacy, Enhanced PROs
- **Faster market access:** Reduced clinical trial report generation time from 12 to 2-4 weeks

Impact on patients / internal stakeholders

- **Patient:** Timely access to effective oral weight management treatment enhancing convenience, reducing social stigma, improving adherence, and eliminating the need for patient training.
- **Internal stakeholders:** Streamlined processes, optimised resource allocation, enhanced collaboration between and across the global teams

GCC's Role in value chain

R&D And preclinical development	Clinical trials and development	Regulatory compliance	Manufacturing and supply	Marketing, sales and post-market surveillance
Optimising trial design and endpoints	Defining and executing analysis, clinical data management, Statistical programming, medical reviews, medical writing, Health authority engagement	Inspection readiness, Global submissions, Managing authority questions & responses, Approval enablement, Lifecycle management	Planning manufacturing capacity and ensuring supply continuity	Contributing data and analysis to conferences and publications, Post marketing surveillance of safety signals and reporting

"Novo Nordisk GCC has moved beyond its traditional support role; we are now taking the lead in delivering excellence and fostering collaboration,"

- Pallavi Trivedi, Regulatory Affairs CMC Associate Director at Novo Nordisk.

"Novo Nordisk GCC plays a pivotal role as a strategic partner—accelerating innovation and helping bring our therapies to patients with greater speed and impact."

- Santosh Ghatol, Associate Director, Clinical Reporting, Novo Nordisk

The story exemplifies the transformative potential of Bengaluru's GCCs in the pharmaceutical sector, evolving from operational hubs to strategic powerhouses driving global innovation.

The Bengaluru center's impact on accelerating Oral Wegovy® submission underscores India's maturing role in high-stakes pharma value chains. By slashing clinical reporting timelines from 12 weeks to 2-4 weeks and enabling submission readiness in just 12 days, it demonstrated unparalleled agility—leveraging deep clinical, biostatistical, and regulatory expertise to align with FDA, EMA, and other mandates eliminating the need for supplemental studies. The 24/7 model, bridging Bengaluru, Denmark and US, optimised cross-functional workflows, resource allocation, and health authority engagements, while extending into manufacturing scale-up and post-market surveillance.

Bengaluru GCCs deliver quantifiable ROI through speed (faster market access), efficacy (matching injectable outcomes with superior patient adherence), and cost efficiencies (streamlined regulatory submissions). This positions them as indispensable for digital-native R&D acceleration, talent-driven regulatory navigation, and patient-centric outcomes—heralding a new era where India's GCC ecosystem propels global obesity therapies and beyond.

"This paper does not contain NN confidential information and should not be construed as promotional material or a health advisory. The quotes provided herein are solely those of the authors and not of Novo Nordisk. Further, Novo Nordisk accepts no responsibility for the content, accuracy, or reliability of information published on external sites linked to this whitepaper."

Case Study 2

Novo Nordisk GBS played a pivotal role in accelerating Regulatory Submission for Wegovy® 7.2 mg s.c using CNPV Fast Track Process.

Outcomes and value delivered

Timeline acceleration: Regulatory Submission for Wegovy ® 7.2 mg s.c reduced **from 12 months to 2 months**

Compressed Response Review Timelines: Meeting **c**adence and tech help reduce regulatory query responses within 24–48 hours (one of the first large pharma companies to utilize the CNPV voucher)

Scalable regulatory model: Biostatistics and analytics involvement from early protocol design to market launch.

How the GCC enabled this impact

Strategic alignment (Leadership collaboration on strategic priorities helped align global and local leaders)

Proactive FAQs and rapid response desk Created meeting governance framework with basic technology to enable response within 24–48 hour (CNPV responses)

Key role in life-cycle management – Bengaluru playing key role in enabling/supporting both late and early LCM project, showing the trust placed by HQ on GCC model

Denmark-Bengaluru enterprise grade agility: (24/7 operating model across Bengaluru–Denmark-US eliminated handoffs, improved submission readiness under extreme timelines)

Impact on patients / internal stakeholders

Patient: Faster patient access & tailored treatment options for different BMI categories and obesity profiles.

Internal stakeholders: Seamless global collaboration & hybrid working models helped break geographic silos enabled faster drug to market via CNPV (Commissioners National Priority Review Voucher) (Fast-track approval)

GCC's Role in value chain

R&D And preclinical development	Clinical trials and development	Regulatory compliance	Manufacturing and supply	Marketing, sales and post-market surveillance
Planning for regulatory submission, streamlining trial design workflows	Follow-the-sun collaboration, AI narrative generation, automated validation processes	Building real-time issue resolution dashboards, accelerating submission readiness cycles	Integrating predictive analytics platforms	Supporting rapid publication pipelines

"We have built an agile ecosystem that enables faster decision making and strengthens global regulatory readiness. Leveraging opensource R programming has enhanced the way we analyse data and support submissions across Novo Nordisk's global portfolio "

- Rajesh Joseph, ***Director, Biostatistics at Novo Nordisk***

"The accelerated submission for Wegovy 7.2mg reflects the strength of our global partnership model. GBS Bangalore has demonstrated how deep expertise, agility, and seamless collaboration can meaningfully shorten the path from innovation to patients. This is a strong example of how we are building a more connected, future ready organisation that delivers better access and better outcomes worldwide.

- John Dawber, ***VP & MD India GCC Leader, Novo Nordisk***

This story exemplifies the transformation of India's healthcare GCCs from delivery centers into strategic innovation engines shaping high-stakes global drug development.

The Bengaluru center's role in fast-tracking the Wegovy® 7.2 mg s.c submission through the US FDA's CNPV pathway signals India's growing involvement in late-stage regulatory programs with direct impact on global portfolios. By compressing regulatory review timelines from ~12 months to ~2 months and enabling near-real-time responses to health authority queries within 24–48 hours, the Bengaluru GCC demonstrated enterprise-grade agility—anchored in deep biostatistics, clinical reporting, statistical programming, data management, safety surveillance and regulatory capabilities,

The 24/7 operating model across Bengaluru, Denmark and US eliminated handoffs, improved submission readiness under extreme timelines, and ensured continuity across LCM programs spanning both late-stage and early development phases.

India GCCs are now delivering measurable ROI for Novo Nordisk across speed (faster market access for differentiated obesity therapies), resilience (multi-city, follow-the-sun delivery for regulatory critical paths), and strategic leverage (de-risking global pipelines through scalable regulatory and clinical platforms). This marks a structural shift—India is no longer a downstream executor, but a strategic partner in driving accelerated approvals, portfolio-scale regulatory orchestration, and patient-impact at global scale.

Wegovy® 7.2 mg is still under review with the FDA and not yet approved - "This paper does not contain NN confidential information and should not be construed as promotional material or a health advisory. The quotes provided herein are solely those of the authors and not of Novo Nordisk. Further, Novo Nordisk accepts no responsibility for the content, accuracy, or reliability of information published on external sites linked to this whitepaper. The application for approval of Wegovy® 7.2 mg is currently under review with the regulatory authorities and this paper does not make any claims, endorsements, or recommendations regarding it."

Case Study 3

Lilly India supported accelerated patient enrollment and reduced participation burden across Lilly's global clinical trials, enhancing efficiency and accessibility for diverse patient populations worldwide.

Outcomes and value delivered

Accelerated trial Initiation: Optimized study-build processes enabled launch of thirty trials in 2025.

Compressed study go-live Timelines: Trial setup timelines reduced from seventeen to thirty weeks to under six.

Earlier patient access to therapies: Faster trial starts advanced patient access to breakthrough treatments.

How the GCC enabled this impact

Technology platform orchestration (Centralised management of clinical technology platforms and tools)

Multi-language trial deployment (Localised configurations enabled faster rollout across geographies)

Impact on patients / internal stakeholders

Patient: Earlier access to breakthrough therapies, reduced complexity and effort for patient participation, Improved trial experience

Internal stakeholders: Accelerated clinical timelines, operational scalability, stronger global–local alignment, lower operational risk

GCC's role

R&D and preclinical development

Optimising study build process, Enabling early trial readiness, supporting global development and alignment

Clinical trials and development

Accelerating trial initiation workflows, reducing patient participation burden, enabling multi-language trial deployment

This story reinforces that modern GCCs are no longer just cost-saving entities but can add value in several areas across the value chain.

By centralising technology platform orchestration and bridging the gap between global strategy and local execution, this GCC has supported several enhancements to the trial lifecycle.

The most striking achievement is the radical compression of study go-live timelines—shrinking a traditionally cumbersome 17-30 week process to under six weeks. This nearly five-fold acceleration does more than just optimise internal workflows; it alters the competitive timeline for drug commercialisation, supporting breakthrough therapies in reaching the market and the patient significantly faster.

Beyond mere speed, the GCC's role in the value chain demonstrates a coordinated integration of regulatory compliance and multi-language deployment. By standardising configurations and automating manual dependencies, the center has contributed to the establishment of a scalable architecture that has supported thirty trials simultaneously in 2025 alone. This model delivers a dual-track value proposition: for the enterprise, it offers unparalleled operational scalability and lower risk; for the patient, it reduces the complexity of participation and provides earlier access to life-changing treatments.

Case Study 4

Lilly India supported accelerated database lock via process and tech changes, speeding key study submission and delivering transformational medicines faster.

Outcomes and value delivered

Timeline acceleration: Database lock reduced from 30–45 days to 7 days, enabling a 3-month earlier regulatory submission.

Automation-led efficiency: AI-driven narratives and validation cut manual review effort by ~70%

Scalable delivery model: Follow-the-sun delivery enabled 3 parallel publications in one-third the time.

How the GCC enabled this impact

Proactive data issue resolution (Real-time dashboards and predictive analytics prevented pre-lock data issues)

AI-Enabled narrative drafting (Automated patient narratives generated first drafts using AI tools)

Follow-the-sun" model (Utilized teams located in US, Cork Ireland, and Bengaluru) to enable 24/7 productivity)

Impact on patients / internal stakeholders

Patient: Faster access to transformational medicines for a critical disease condition, potentially improving health outcomes and saving lives sooner.

Internal Stakeholders: Streamlined workflows, eliminated bottlenecks, automated validation, and real-time dashboards; boosting efficiency, productivity, and future project speed.

GCC's role

R&D and preclinical development

Streamlining trial design workflows

Clinical trials and development

Follow-the-sun collaboration, AI narrative generation, automated validation processes

The transformation in this success story delivers a dual-value proposition: it maximises internal ROI through accelerated submission timeline, while simultaneously ensuring that life-altering treatments reach patients with a velocity that was previously unattainable in the heavily regulated biopharma landscape.

Leveraging advanced automation, globalised labor models, and predictive analytics, Lilly India has supported the transformation of clinical delivery from a linear, time-intensive process into a high-velocity, parallelised engine.

By integrating AI-enabled narrative drafting and a "follow-the-sun" operational model across Bengaluru, Ireland, and the US, Lilly has effectively decoupled drug development timelines from traditional constraints.

The ability to compress database lock cycles from 45 days down to a mere week is not just an incremental efficiency gain; it is a competitive paradigm shift that enables regulatory submissions to occur months ahead of schedule.

Beyond mere speed, the GCC's role in "Pipeline Standardisation" signals a move toward institutionalised agility, where high-stakes clinical validation is no longer a bespoke manual effort but a scalable, tech-driven asset. By reducing manual review effort by 70%, these centers are freeing up high-value clinical talent to focus on complex problem-solving rather than administrative data reconciliation.

Case Study 5

Becton Dickinson Technology Campus in India accelerated the design and development of Urology and Critical Care products especially senior citizen patients with severe Urinary Incontinence (UI)

Outcomes & Value Delivered

Faster Market Access:
Compressed design-to-verification cycles accelerated launch timelines & enabled earlier patient access.

Automation-Led Efficiency:
DFx, in-house labs, & digital verification cut rework and external dependencies, lowering cost-to-serve.

How the Technology Campus in India Enabled This Impact

Concept innovation (Concept creation across pumps, wearables which helped in conclusive design which were stable and robust)

Design Responsibility (Mechanical Module ownership from concept to verification enabled faster decisions, tighter feedback loops, and fewer handoffs)

DFx + IP Engine (Design-for-manufacture simplified components by >30% while converting innovations into patent filings)

Advanced Verification (In-house battery, airflow, fluid-flow, and pressure testing enabled rapid design iteration and first-time-right regulatory-grade validation)

Impact on Patients / Internal Stakeholders

Patient:
Restores independence and dignity for wheelchair-bound patients through a discreet, non-invasive urine management solution that fits seamlessly into daily life.

Internal Stakeholders:
Accelerates time-to-market and lowers cost-to-serve through DFx-led design simplification, component reduction, and in-house verification at BD TCI.

The Bengaluru-based BD TCI team co-created a breakthrough urology care solution for wheelchair-bound patients with severe incontinence, restoring patient dignity and independence through a mobile, discreet, non-invasive urine management system that seamlessly integrates with external catheters and materially improves caregiver efficiency in constrained care settings.

By owning product-mechanical and development, from early concept studies till design verification—BD TCI compressed productization cycles and solved hard engineering trade-offs. The team simplified industrial design into a manufacturable reality, reduced component complexity by over 30% to lower assembly costs and improve reliability, and conducted full verification testing (battery performance, fluid/air flows, pressure) in state-of-the-art India labs. Multiple invention disclosures and patent filings emerged from this work, signaling IP creation, not just delivery.

The India Technology Campus delivered quantifiable ROI across patient outcomes (greater mobility, dignity, and adherence), operational efficiency (simpler UI for caregivers, faster deployment in care environments), and cost-to-serve (DFx-led component reduction and manufacturing-ready design). This marks a structural shift in MedTech R&D: India Technology Campus are now core innovation partners driving human-centred device design, IP generation, and scalable global product platforms across urology and critical care portfolios.

This success story exemplifies how India's MedTech Technology Campus are moving beyond engineering execution to outcome-driven product innovation with direct patient impact.

Case Study 6

Alcon Global Services India's Integrated Model Powering the Future-Ready Digital Platform for ECPs and Patients Worldwide

Outcomes and value delivered

The platform modernizes the contact lens purchasing journey by digitizing end-to-end ordering, reducing manual work, errors, and operational costs for clinics and the company. Eye Care Professionals gain tools for patient management, digital prescriptions, catalog management, invoicing, payments, and communication, helping them grow their practice and stay competitive. Patients benefit from seamless direct ordering, automated reminders, tracking, and doorstep delivery. The solution supports B2B and B2B2C models across 80+ countries.

How the GCC enabled this impact

Alcon Global Services enabled this transformation by bringing product, engineering, ERP, architecture, QA, DevOps, integrations, and analytics together under one operating model. This accelerated collaboration, ensured faster alignment, and strengthened delivery. Leveraging Bengaluru's deep digital and engineering talent, AGS built strong capabilities while driving employee development through structured learning and mobility programs. Close partnership with global leadership ensured consistent strategy, scalable architecture, and rapid deployment across multiple markets.

Impact on patients / Internal stakeholders

Impact on ECP (Eye care professionals) and Patients

This platform empowers Eye Care Professionals by helping them stay continuously connected with their patients, efficiently manage and grow their practice, and stay protected from increasing digital disruption from online retailers and tech companies playing in the eye care industry. Capabilities include patient management, digital prescription creation, product catalog management, dashboards, invoicing, patient communication, payments, orders and more.

For patients, the platform delivers a seamless, convenient and secure experience—enabling direct to patient contact lens ordering, efficient order tracking and management, automated reorder reminders, and hassle-free shipping right to their doorstep.

This platform, currently offering B2B (all markets) & B2B2C (selected markets) capabilities, is deployed in 80+ countries with customers worldwide.

GCC's role in value chain

The GCC hosts end-to-end engineering and governance, managing ideation, development, quality assurance, and global deployment. It introduced integrated Product and Engineering PODs, a Multi-Market Deployment POD, and an Architecture POD to ensure scalability and consistent standards. DevOps maturity improved through automated CI/CD, multi-region deployment, monitoring, and observability. Automation in QA enabled rapid, reliable releases. The GCC established a cloud-native architecture using SaaS commerce, headless CMS, AWS serverless, Terraform, and MuleSoft.

This case study talks about how a modern global digital platform transformed the contact lens purchasing and patient engagement experience for eye care professionals (ECPs) and their patients. The platform streamlines end-to-end order processing, reduces manual workload, and strengthens practice efficiency while delivering a seamless, secure ordering experience for patients. It has been deployed across 80+ countries, serving over 30,000 customers with localized digital capabilities. This impact was enabled by a GCC-led operating model that unifies product, engineering, architecture, DevOps, QA, and analytics into a cohesive delivery engine. By replacing fragmented legacy systems with a scalable cloud-native architecture and a POD-based collaboration model, the team established a future-ready foundation that supports global growth and continuous innovation.

"By strengthening our partnership with Eye Care Professionals and ensuring our vision care products reach patients faster and more seamlessly, we are delivering on our purpose of helping people see brilliantly."

- Rufus Anderson, Director of Engineering,

Engineering delivery for Digital Health Vision Care

"Impact is the new currency of GCCs — measured by how our work improves end-user experience and patient outcomes."

– Vineet Dwivedi, Vice President, Alcon Global Services.

Case Study 7

Alcon Global Services India's Role in Reimagining the Cataract Surgery Experience Through Technology

Outcomes and value delivered

The next-generation digital platform for ophthalmic care is transforming how surgeons, patients, and practices operate by integrating workflows and automating manual tasks so critical information is available exactly when needed. Its cataract surgical planning module is projected to elevate quality and consistency by reducing planning variability and enhancing decision-making. With streamlined end-to-end workflows, practices can expect smoother operations, better collaboration, higher efficiency, and improved clinical and operational outcomes across the surgical journey.

How the GCC enabled this impact

AGS India enabled this transformation through strong global collaboration with R&D, Digital Health, Franchise strategy, IT, Quality, and Regulatory Affairs into a unified ecosystem that accelerates innovation and strengthens product quality. By centralizing end-to-end capabilities, the GCC ensured faster time-to-market, greater localization, and seamless global adoption of the platform. Its integrated operating model, deep clinical and med-tech expertise, and strong alignment with global teams allowed Alcon's digital health solutions to scale efficiently across regions.

Impact on patients / Internal stakeholders

For patients, the platform creates a more confident and informed cataract surgery experience through personalized, automated surgical plans and real-time connectivity across pre-op, intra-op, and post-op stages. For surgeons and staff, it provides the ability to plan anywhere, unify EHR data, device outputs, and surgical information, and eliminate more than 25 manual steps, saving 4.3 minutes per patient. These efficiencies return valuable time to practices, improving care quality, productivity, and clinical outcomes.

GCC's role in value chain

AGS India plays an end-to-end role across the value chain—spanning R&D, Digital Health, IT, Franchise and GTM strategy, and Quality and Regulatory Affairs. By integrating these functions in one ecosystem, the GCC accelerates innovation, strengthens product quality, and supports global deployment of digital solutions. This model enhances time-to-market, ensures regulatory alignment, and enables localized relevance while supporting product development, clinical enablement, market expansion, and ongoing post-market improvements for Alcon's digital health technologies.

The changes brought about by this digital surgery platform create a dual value proposition. It improves internal return on investment by streamlining clinical and operational workflows. At the same time, it significantly improves patient outcomes by enabling faster, more consistent surgical decision-making. What used to be a disjointed, manual, and clinic-bound planning process is now a cloud-based operating layer for cataract care. This shift reduces the time needed for surgery readiness while boosting confidence at the point of care.

By integrating Intelligent surgical planning, automated workflows, and a scalable digital health structure, the India GCC has transformed cataract surgery planning. It has turned a linear, administrative bottleneck into a fast, always-ready clinical engine. Removing over 25 manual transcription steps and enabling surgeons to plan from anywhere frees surgical throughput from administrative hurdles. This change returns thousands of clinical minutes to patient care and expands surgical capacity.

In addition to speed and efficiency, this program signals a shift in how digital health platforms are created and expanded worldwide. With built-in compliance (HIPAA, SOC 2, HITRUST), strong interoperability with devices and EHRs, and a platform-product operating model based in India, the GCC is establishing "Surgical Workflow Standardisation" as a key enterprise capability. It changes what was once custom, site-specific planning into a repeatable, intelligent global resource for ophthalmic care at scale.

"Innovating the future of eye care to help people .See Brilliantly"

- Senthil Nedunchezhian, Head of Digital Health Surgical Engineering, Global Product development and delivery of Adi – Digital Health Surgical products.

What the future of healthcare and life science GCCs in India is likely to look like

Future outlook for healthcare and life sciences

From Capability centres → **To Digital, R&D and Innovation Hubs**

The number of healthcare and life sciences GCCs in India is expected to increase from 160 (2025) to ~200+ (2030), employing >3.5 lakh professionals, with around ~275+ GCC units

Ecosystem propelling GCC evolution	Disruptive forces shaping 2030 ecosystems	Strategic pillars for global dominance
• **Techno-functional talent:** Talent that will fuse deep domain expertise with digital first capability • **Academic research**: Deep partnerships with universities, medical institutions and research consortia • **Policy support:** State Government support for GCCs, dedicated National GCC Frameworks for Tier-II/III cities • **Operational ease:** Safe Harbour rules for Transfer Pricing • **Infrastructure:** Development of large, specialized Healthcare clusters (such as Genome Valley in Hyderabad, and also other parts of India) • **R&D funding:** substantial private R&D investments	• **Artificial intelligence:** Transitioning from isolated AI pilots to integrated, enterprise-wide AI ecosystems. • **Micro and nano GCCs:** Rise of hyper-specialized, agile centers (25–250 people) focusing on niche areas like Genomics and Digital Therapeutics, among others. Private Equity play. • **GCC setup innovation:** Capex-Lite models like KPMG's OneGCC model, adoption of Build-Operate-Transfer (B-O-T) models - both will reduce setup time and upfront investments • **GCC strategy:** - 'AI first': with maturity, processes built around AI - Hybrid Sourcing: mix of inhouse & outsourced models - Startup Cross-Pollination: HealthTech co-creation - Supply Chain 2.0: AI infused supply chain management & shifts toward "Manufacturing-linked R&D"	• **Deep-Tech talent:** India is becoming the global hub for Digital, Bio-informatics and AI/ML • **Geo-diversification:** Shifting from the "Big 2" (Bengaluru/ Hyderabad) to a 10-city grid to optimize costs and talent. Healthcare Cluster development • **AI and regulatory leadership:** Centers are now leading and managing global compliances (FDA/EMA), automated pharmacovigilance and faster GXP for more reliable data, Digital and Cyber strengthening • **Key alliances**: strengthening ecosystem alliances is key, with startups, academia, and others

Source: *KPMGin India's analysis 2026 and UnearthIQ trends and analysis*

Healthcare and life Sciences GCCs are evolving into innovation hubs, positioning India as the global command hub for healthcare innovation. This shift is driven by a transition from transactional back-office support to the co-ownership of high-value intellectual property and global product strategies. Key enablers like the recent Labour Codes rules, and the Digital Personal Data Protection (DPDP) Act and industry evolved frameworks (such as GCC 2.0/3.0), along with robust talent supply are fueling this growth, creating a robust regulatory and operational bedrock that allows for secure, large-scale clinical data management and advanced R&D.

Additionally, the Indian Government (via the budget announcement in February, 2026) is proposing to structurally deepen the Healthcare and Pharma ecosystem, via:

- Large-scale, multi-year biopharma mission funding (Biopharma SHAKTI), including new NIPER setups and expanding existing, clinical trial sites, and regional medical hubs
- Healthcare and research infrastructure scale-up (DHR/ICMR, PM-ABHIM, PMSSY, surveillance networks)
- Introduction of greater tax certainty for healthcare GCCs via relaxed and expanded safe harbour norms and fast tracking of certain categories of APAs - likely to benefit IT/ITES/contract R&D and data centers

All such initiatives will help develop the Healthcare and Life Sciences GCC ecosystem as well as local Indian industry, via deeper research funding, better regulators, richer data, and clearer tax rules. In addition, initiatives such as Biopharma SHAKTI, NIPER expansion, regional medical hubs and the scaled-up DHR/ICMR architecture will increase and strengthen the talent pool available to GCCs and could also help create a network of public-sector and academic partners.

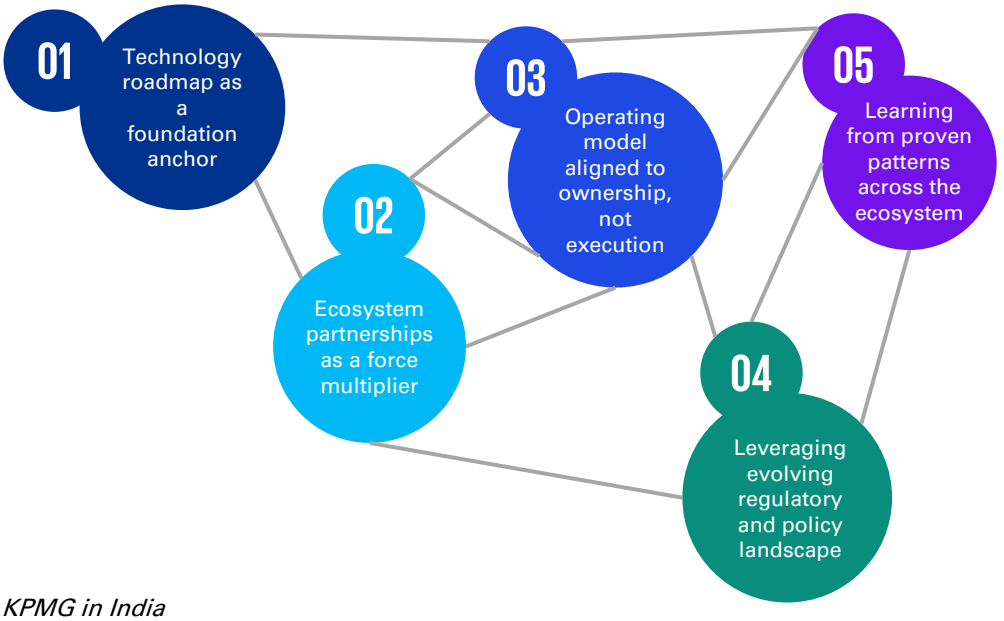
These initiatives will further strengthen India's position as a must-have destination for Healthcare & Life Sciences majors seeking to innovate, research, de-risk supply chains and accelerate time-to-market.

The GCC ecosystem is growing further and will adapt to both opportunities and disruptions

As global enterprises navigate accelerating scientific complexity, tighter regulatory scrutiny and rising expectation on speed and access, GCCs are emerging as global platforms to scale critical capabilities across the value chain.

India has emerged as a natural anchor for the sector's next generation GCCs owning complex, high stakes responsibilities that sit at the heart of global operating models. The experience reflected across this report indicates enterprises are entering India through multiple models, but what differentiates successful entrants is the clarity of intent and the ability to design for evolution from the outset.

Several considerations consistently shape successful GCC setups and evolution paths:



Source: *KPMG in India*

Applying this approach, several next generation digital-first centres are coming into India with a thought-through location strategy, conscious legal entity setup choices, strong regulatory compliance, operating model design, and workforce build-outs, ensuring a robust foundation for long-term efficiency, resilience, and growth.

GCCs in India are thriving, and while there are geo and macroeconomic factors to take into account, a stronger GCC ecosystem shaped by strong talent and technology will make the global Life Sciences and Healthcare sector stronger and more resilient, along with the enhances abilities in core functions.

> "In healthcare, the success of a GCC must be measured by outcomes not headcount. By pairing agentic AI capabilities with orchestrated workflow interventions across the entire patient care lifecycle, we can compress time-to-decision, anticipate needs, and elevate the quality of care at scale while still delivering material economic value. India-based GCCs are fast becoming the nerve centers of truly patient-centric enterprises."
>
> **- Vikas Sankhla, Partner, GBS Advisory, KPMG in India**

Acknowledgment

We sincerely thank GCCs involved in the publication of this report. We acknowledge the efforts put in by the core team, from the initiation to the publication of this report.

KPMG in India

- Shalini Pillay
- Kartik Ramakrishnan
- Sandeep Paidi
- Vandana Chopra
- Vijay Vadali
- Siddharth Sharma
- Amitesh Kumar
- Gayatri Sharma
- Nisha Fernandes
- Nandini Tare
- Saritha Rana
- Arun Choudhary
- Mahima

Unearth IQ powered by UnearthInsight

- Gaurav Vasu
- Shail Maniar
- Neha Gupta & team UnearthIQ

State Government of Telangana

- Shakthi Nagappan
- Navya Bukya

In collaboration with UnearthIQ:
UnearthIQ is a practitioner-led insights and advisory firm helping organizations build, scale, and optimize their Global Capability Centers (GCCs). With over 120 years of collective leadership experience, we combine deep market intelligence, competitor benchmarking, and execution know-how to deliver measurable impact. Our offerings include DisruptIQ, which equips GCC leaders with strategic intelligence to evaluate and establish high-value centers in India and InsightCircle, which enables GCCs to benchmark, assess, and enhance their operational performance through actionable insights.

KPMG in India contacts:

Akhilesh Tuteja
Partner and Head
Clients and Markets
E: atuteja@kpmg.com

Kartik Ramakrishnan
Partner and India leader
Healthcare and Life Sciences GCC
E: kartikramakrishnan@kpmg.com

Shalini Pillay
Partner and India Leader
Global Capability Centres
E: shalinipillay@kpmg.com

kpmg.com/in

Access our latest insights on KPMG Insights Edge

Follow us on:
kpmg.com/in/socialmedia

KPMG Assurance and Consulting Services LLP, Lodha Excelus, Apollo Mills Compound, NM Joshi Marg, Mahalaxmi, Mumbai – 400 011 Phone: +91 22 3989 6000, Fax: +91 22 3983 6000.