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India's GCCs: Powering the Global Life Sciences Value Chain

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India's life sciences Global Capability Centre (GCC) landscape is undergoing a significant transformation, driven by the country's deep pool of skilled talent across research and development, clinical operations, regulatory affairs, pharmacovigilance, data science, artificial intelligence, engineering and digital health. With more than 36 pharma-focused GCCs operating in India, nearly 85 per cent are concentrated in Bengaluru, Hyderabad, Mumbai and Delhi-NCR. These centres are evolving beyond traditional support functions to become strategic hubs for innovation, specialised expertise and digital transformation, making them an increasingly integral part of the global operating models of pharmaceutical companies.



India's pharmaceutical industry is entering a new chapter in its global evolution. For decades, the country earned its reputation as the "pharmacy of the world" on the strength of its generic medicines, contract manufacturing, vaccines and ability to deliver affordable healthcare at scale. Today, however, India's role is expanding beyond manufacturing and cost efficiency to include innovation, specialised expertise and global capability building.

The rapid growth of Global Capability Centres (GCCs) is a clear reflection of this shift. Pharma GCCs in India are moving well beyond traditional functions such as finance, information technology, procurement and back-office operations. They are increasingly becoming strategic hubs supporting drug discovery, clinical development, pharmacovigilance, regulatory affairs, biostatistics, data science, digital health and commercial strategy.

This evolution is particularly significant for life sciences because the value created by these centres increasingly sits close to the core of the pharmaceutical business. Indian teams are not simply executing globally defined processes; they are increasingly contributing to scientific decision-making, clinical development, technology architecture, data-driven insights and the design of solutions that can be deployed across multiple markets.

These centres are now becoming an integral part of the global operating models of pharmaceutical companies. By bringing together India's deep scientific talent pool, digital capabilities, cost competitiveness and expanding innovation ecosystem with the global reach and resources of multinational companies, pharma GCCs are positioning India as a critical engine for the next phase of growth in the life sciences industry.

The shift also changes the way multinational companies view their Indian operations. Instead of operating as standalone offshore units, GCCs are increasingly being integrated into global functional networks, with teams in India collaborating directly with headquarters and regional operations on programmes that have global business impact.

Advantage India

India offers a combination of advantages that few other markets can replicate. The country has a deep pool of professionals across pharmacy, biotechnology, medicine, engineering, data science, clinical research and regulatory affairs. This multidisciplinary talent base is particularly valuable to pharmaceutical companies, where drug development increasingly requires seamless integration of scientific, clinical, regulatory and commercial expertise.

While cost efficiency remains an important consideration, it is no longer the primary driver behind GCC investments in India. The focus is shifting from traditional labour arbitrage towards access to specialised talent, innovation capabilities and high-value expertise. Indian teams are increasingly taking on complex functions such as molecular modelling, bioinformatics, clinical data management, medical writing, safety signal detection, real-world evidence generation and regulatory submissions.

The availability of talent at scale is another important differentiator. Pharmaceutical companies can build large multidisciplinary teams in India while also accessing professionals with experience across multiple therapeutic areas, regulatory environments and technology platforms. This is particularly relevant as drug development becomes increasingly data-intensive and requires expertise spanning biology, medicine, statistics, software engineering and artificial intelligence.

India's established IT services ecosystem, expanding start-up landscape and strong network of universities, research institutions, hospitals and contract research organisations further strengthen its position. These capabilities enable pharmaceutical GCCs to collaborate with external partners, adopt emerging technologies and develop scalable, technology-led solutions.

The convergence of life sciences and technology is creating another layer of opportunity. Generative AI, machine learning, automation, cloud computing and advanced analytics are increasingly being applied to areas such as clinical trial design, patient recruitment, pharmacovigilance, medical information, regulatory intelligence, manufacturing analytics and commercial forecasting. For GCCs, this creates an opportunity to become centres of technology-led experimentation as well as large-scale execution.

Hubs

Bengaluru, Hyderabad, Mumbai, Pune, Chennai and Delhi-NCR continue to remain key destinations for pharmaceutical and life sciences GCCs in India. Each location offers a distinct combination of talent, infrastructure and industry capabilities. Bengaluru stands out for its deep technology talent pool, thriving start-up ecosystem and strong capabilities in advanced analytics and digital technologies. Hyderabad, meanwhile, has emerged as a major life sciences hub, supported by a robust pharmaceutical industry, research institutions and biotechnology infrastructure.

Mumbai and Pune offer the advantage of proximity to corporate headquarters, financial services, manufacturing ecosystems and an established pharmaceutical talent base. Chennai also benefits from its strong industrial and healthcare ecosystem, while Delhi-NCR provides access to a large pool of specialised talent and a well-developed corporate and services infrastructure.

The choice of location is increasingly driven by factors beyond cost. Companies are evaluating the availability of specialised skills, quality of infrastructure, office ecosystems, employee costs and proximity to research, manufacturing and commercial clusters.

The next phase of expansion could also see greater interest in emerging locations. As competition for talent and real estate intensifies in established hubs, companies are evaluating Tier-II cities that offer specialised talent, lower operating costs and proximity to universities and healthcare institutions. A multi-city model can also help companies diversify talent pools and build resilience into their operations.

Hyderabad's momentum is particularly noteworthy. The city has recorded a significant increase in pharmaceutical GCC office leasing, with the sector accounting for a substantial share of overall GCC leasing activity during 2024 and the first half of 2025, underscoring its growing importance as a strategic life sciences capability hub.

State-wise growth

More than 36 pharma-focussed GCCs are in India with nearly 85 per cent concentrated in Bengaluru, Hyderabad, Mumbai and Delhi-NCR.

The concentration of GCCs in these four markets reflects the availability of specialised talent and mature business ecosystems, but it also highlights an emerging challenge: how to distribute future growth without creating excessive competition for the same talent pool. Companies may increasingly need to adopt distributed operating models, combining established life sciences hubs with emerging technology and talent centres.

Bengaluru accounts for around 33 per cent of healthcare GCCs, remains the leading destination. The city hosts major operations of GSK, with its GCC employing more than 2,500 people; AstraZeneca's Global Technology Centre, with over 3,100 employees; Eli Lilly's Lilly Capability Centre India, established in 2016; as well as Siemens Healthineers' Digital Hub and Abbott's Global Analytics Hub. The city's deep technology talent pool and strong digital ecosystem continue to make it a preferred location for high-value capabilities.

Beyond the established multinational presence, Bengaluru's strength lies in the interaction between technology companies, start-ups, academic institutions and life sciences organisations. This creates an ecosystem in which pharmaceutical GCCs can access not only employees but also technology partners, innovation networks and specialised service providers.

Hyderabad accounts for around 26 per cent of healthcare GCCs, has emerged as a major hub for R&D and clinical operations. Novartis conducts clinical operations for more than 140 countries from the city and employs around 8,000 people. Bristol Myers Squibb operates a \$100 million innovation hub with more than 3,000 employees, while Amgen is investing \$200 million in a technology and innovation site. Bayer also maintains a significant R&D presence in Hyderabad.

Hyderabad's advantage is further strengthened by its broader life sciences ecosystem, which spans pharmaceutical manufacturing, biotechnology, research, clinical development and technology. This creates opportunities for GCCs to connect global capability functions with the wider pharmaceutical value chain.

Mumbai, with approximately 15 per cent of healthcare GCCs, is increasingly focused on commercial operations, analytics and product-development capabilities. Abbott's analytics operations, Johnson & Johnson's drug-product development sciences and Pfizer's AI and analytics activities highlight the city's growing role in specialised pharma functions.

Delhi-NCR, accounting for about 12 per cent, has emerged as an important base for shared services, regulatory affairs, medical affairs and digital functions. Many companies operate these capabilities as part of integrated, multi-city GCC networks spanning Bengaluru, Hyderabad and other locations.

Together, leading players such as Novartis, AstraZeneca, Bristol Myers Squibb, GSK and Pfizer, alongside Sanofi, Eli Lilly, Roche, Johnson & Johnson and Abbott, employ more than 17,000 professionals across their Indian operations and have committed investments running into hundreds of millions of dollars.

For the industry, the significance of these investments extends beyond direct employment. Large GCCs create demand for technology providers, contract research organisations, consulting firms, specialised recruitment, training and professional

services, thereby contributing to a broader life sciences services ecosystem.

Players

Leading players include Novartis, AstraZeneca, Bristol Myers Squibb, Sanofi, GSK, Eli Lilly, Roche, Pfizer, Johnson & Johnson, Abbott, Merck, Regeneron and Boston Scientific. Notably, 23 of the world's top 50 life-sciences companies have established GCCs in India.

DePuy Synthes, Johnson & Johnson's orthopaedics business, announced plans to establish a new GCC in Bengaluru. DePuy Synthes is working to establish the centre which will host disciplines including software development, data and AI, enterprise applications, technology services, cybersecurity and more upon launch. Says **Namal Nawana, Worldwide President, DePuy Synthes**, "Over the next 18–24 months, we expect to build a team of approximately 500 professionals in Bangalore, with room to grow as the centre matures."

The growing participation of medical technology and biotechnology companies is also broadening the GCC opportunity beyond conventional pharmaceutical operations. Functions such as connected health, medical devices, software engineering, cybersecurity, digital therapeutics and advanced analytics are becoming increasingly relevant to the life sciences GCC model.

Parexel's India GCC supports more than 12 functions, bringing together multidisciplinary expertise across clinical operations, pharmacovigilance, regulatory affairs, biostatistics, supply chain management, finance, legal, IT and other enabling functions to support global drug development programmes.

This multidisciplinary model is likely to become increasingly important as companies seek to integrate clinical, scientific, technology and business functions rather than operate them in silos. The ability to assemble cross-functional teams in one geography can shorten decision cycles and improve coordination across global programmes.

Sanjay Vyas, President, Patient Safety Services and Clinical Logistics and Managing Director, Parexel India believes that by 2030 India's life sciences GCCs will be recognised not just for their scale, but for the strategic role they play within global organisations. Vyas adds, "We will see GCCs moving the needle to being strategic partners and not just delivery hubs. As these capabilities continue to mature, India will strengthen its position as a trusted partner for innovation, scientific excellence and operational leadership."

While providing Pfizer's perspective on India's rapidly evolving GCC ecosystem and its growth trajectory, **Debjit Biswas, Vice President and Head, Development Operations, Pfizer India** mentions that Pfizer India contributes across clinical development, medical, safety, regulatory sciences, logistics, digital, analytics and data sciences functions, with both scientific depth and operational ownership aligned to global priorities. Biswas goes on to add, "As we continue bringing breakthrough medicines to **patients**, the opportunity lies in building multidisciplinary talent that combines healthcare knowledge with digital fluency. The most impactful GCCs will be measured not by headcount, but by problem-solving capabilities, which can be implemented at scale and speed."

At Sanofi, the Hyderabad Global Hub is expanding capabilities across research and development, AI, digital health, intelligent automation, data analytics, medical affairs, commercial operations, finance, procurement and people services, reflecting the broader evolution of GCCs into integrated business hubs. Sanofi is expanding strategic capabilities across research and development, AI, digital health, intelligent automation, data analytics, medical affairs, commercial operations, finance, procurement and people services. The company is focused on creating highly skilled jobs across the value chain while building multidisciplinary teams that can address evolving business and scientific needs.

The Sanofi example also illustrates how the boundaries between technology, science and business operations are becoming increasingly blurred. AI and automation are no longer limited to IT functions; they are being embedded into research, commercial and enterprise processes, creating new requirements for hybrid talent.

Mrinal Duggal, Head of Hyderabad Global Hub, Sanofi believes that India offers a mature ecosystem for healthcare GCCs, and as organisations continue to scale, maintaining regulatory compliance remains fundamental. Duggal adds, "We expect GCCs to continue expanding their role by bringing together highly skilled talent across the value chain and supporting enterprise-wide transformation. India's exceptional talent pool in digital innovation, AI and data science, coupled with its growing life sciences ecosystem, positions the country to play an even more significant role in advancing global innovation."

Bristol Myers Squibb (BMS) Hyderabad is strengthening its capabilities across research and development, commercial operations, enterprise technology, and AI-driven digital transformation. The company is investing in advanced digital capabilities to streamline processes, enable data-driven decision-making, and enhance value delivery across the pharmaceutical value chain. BMS is investing significantly in learning and development through programmes such as

ElevateU, the Manager Development Program, AI and digital upskilling, and cross-functional career opportunities.

Giving a perspective about the National GCC Policy Framework, **Shriya Dutt, Senior Director, People Organization and Board, Corporate Social Responsibility, BMS, Hyderabad** mentions, “GCCs can play a vital role in creating this innovation-focussed ecosystem, and the upcoming National GCC Policy Framework is a welcome step in this direction, particularly its emphasis on streamlined approvals, ease of doing business, and enabling GCCs to move up the value chain from delivery-based operations toward R&D and engineering-led work. As GCCs increasingly become strategic innovation hubs rather than delivery centres, a robust talent ecosystem combined with progressive, forward-looking policies will be instrumental in attracting more global life sciences organizations to establish and expand their presence in India.”

Policy support could become an important enabler of the next stage of GCC growth. Beyond incentives, companies will increasingly look for improvements in ease of doing business, access to specialised talent, research infrastructure, data governance, intellectual-property protection and collaboration between industry and academia.

From an investors’ point of view, **Mayur Sirdesai - Partner and Co-Founder - Somerset Indus Capital Partners** focuses on the depth of scientific and regulatory talent, institutional quality systems and stickiness of client relationships. Having backed healthcare delivery, diagnostics and pharma services businesses across Tier I, II and III India, Sirdesai believes that the constraint over the next decade will not be in demand. It will be talent quality and leadership depth. The companies and investors who solve for that, who invest in upskilling, build leadership pipelines and create bidirectional talent flows with academic institutions, will compound meaningfully. Those who treat this as a cost story will find it commoditised.

Talent development is therefore emerging as one of the defining issues for the sector. The next generation of GCC leaders will need to combine scientific understanding with technology, business and people-management skills. Partnerships with universities, professional institutions and industry bodies could become increasingly important in creating specialised talent pipelines rather than relying solely on lateral hiring.

Thermo Fisher’s areas of focus in India continue to be research and development, software engineering, application development, digital technologies, AI and data science. The company has recently expanded the Bengaluru facility, which is focused on antibody research, design and manufacturing for applications worldwide. Beyond Bengaluru, Thermo Fisher’s India Engineering Centre in Hyderabad designed the Air Quality Monitoring Systems, which are now manufactured locally.

Says **Srinath Venkatesh, Managing Director, India & South Asia, Thermo Fisher Scientific**, “As the sector moves toward more research-intensive work, among the capabilities where we see particularly strong demand are the most specialised ones, spanning molecular biology, protein sciences, advanced and AI-enabled scientific research, bioinformatics and translational science, along with regulatory and clinical domain expertise. These capabilities depend not only on formal academic training but on hands-on experience with advanced instrumentation and real research problems, which is where supply is most limited. Closing this gap depends on closer collaboration between industry and academia.”

Venkatesh adds, “Through our partnership with DPIIT under Startup India, including the BioVerse Challenge and BioVerse Mentors Circle, we aim to support more than 500 biotech startups over three years. Our five Centres for Innovation with bioincubators, along with the Customer Experience Center and the Bioprocess Design Center in partnership with the Government of Telangana, provide researchers and manufacturers with access to advanced technologies and mentorship.”

Regeneron Pharmaceuticals, a global biotechnology leader headquartered in the US, announced plans to establish the Regeneron Global Capability Centre (GCC) in Hyderabad. Expected to be operational in the second half of 2026, the site is planned to scale to hundreds of new roles in the coming years. According to **Rajiv Onat, Executive Director, Regeneron GCC**, “The Regeneron GCC will be anchored by a commitment to exceptional talent and a culture that enables people to do the best work of their careers.”

The entry of companies such as Regeneron also signals the broadening of India’s GCC opportunity from established big-pharma organisations to global biotechnology companies. As biotech pipelines become more complex and data-intensive, capabilities in computational biology, clinical development, translational science and digital platforms could become important areas of future expansion.

Likely hurdles

Despite their strong growth potential, pharma GCCs face a range of challenges as they scale into more strategic roles. Talent competition is becoming increasingly intense, with technology firms, consulting companies, biotechnology players and other multinational corporations competing for the same pool of specialised professionals. Attracting and retaining experienced talent across clinical research, regulatory affairs, scientific functions and digital technologies will therefore remain a key priority.

Organisations are looking to build multidisciplinary teams that can work seamlessly across research and development, medical affairs, commercial operations, finance, procurement, and other enterprise functions to support global priorities.

This creates a fundamental shift in workforce requirements. Companies will need people who can operate across functional boundaries rather than specialists who work within isolated teams. The ability to combine domain knowledge with AI, data analytics, automation and digital tools is likely to become one of the most valuable skill combinations in the sector.

Data privacy and cybersecurity are equally critical. Pharma GCCs handle highly sensitive clinical, patient and intellectual-property data, making robust security frameworks essential. This includes stringent access controls, data governance and localisation, third-party and vendor oversight, comprehensive audit trails, and strong cyber-resilience capabilities.

At the same time, the pursuit of speed and automation cannot come at the expense of quality or compliance. AI-generated outputs, automated processes and analytical models must be properly validated, monitored and subject to human oversight. As regulatory scrutiny increases, GCCs will need to ensure strong governance, particularly in areas involving clinical evidence, patient data and software-enabled medical technologies.

Another challenge will be demonstrating measurable value. As GCCs mature, global leadership teams are likely to look beyond employee numbers and operating-cost savings to metrics such as innovation generated, cycle-time reduction, quality improvements, technology adoption, intellectual-property creation and contribution to revenue or pipeline outcomes. This will determine whether GCCs are viewed as strategic assets or continue to be treated primarily as operating centres.

The future belongs to GCCs

For multinational pharmaceutical companies, Indian GCCs are evolving well beyond traditional cost centres into strategic engines of growth, innovation and global execution. By supporting advanced research, accelerating drug development, enabling digital transformation and strengthening patient-centric capabilities, these centres are increasingly influencing business outcomes across markets. For India, this expansion reinforces its position in the global pharmaceutical value chain—moving beyond its established strength in manufacturing affordable medicines to playing a more significant role in discovering, developing and delivering the therapies of tomorrow.

The defining question for India's pharma GCC story is therefore no longer how many centres the country can attract, but how much strategic value these centres can create. The transition from headcount-led expansion to capability-led growth will determine the next phase of the market. Companies that build strong scientific leadership, invest in digital and AI capabilities, develop local talent and integrate Indian teams into global decision-making are likely to gain the greatest advantage.

The future looks bright. Looking ahead, GCCs will continue to expand their role by bringing together highly skilled talent across the value chain and supporting enterprise-wide transformation. India's exceptional talent pool in digital innovation, AI and data science, coupled with its growing life sciences ecosystem, positions the country to play an even more significant role in advancing global innovation.

India's opportunity is ultimately larger than becoming the preferred destination for pharma GCCs. If the country can deepen industry-academia collaboration, strengthen specialised talent, encourage innovation and maintain high standards of data, regulatory and intellectual-property governance, its GCC ecosystem can become an important part of the global life sciences innovation architecture. The next decade could see Indian teams move from executing global strategies to helping shape them.

Sanjiv Das

sanjiv.das@mmactiv.com