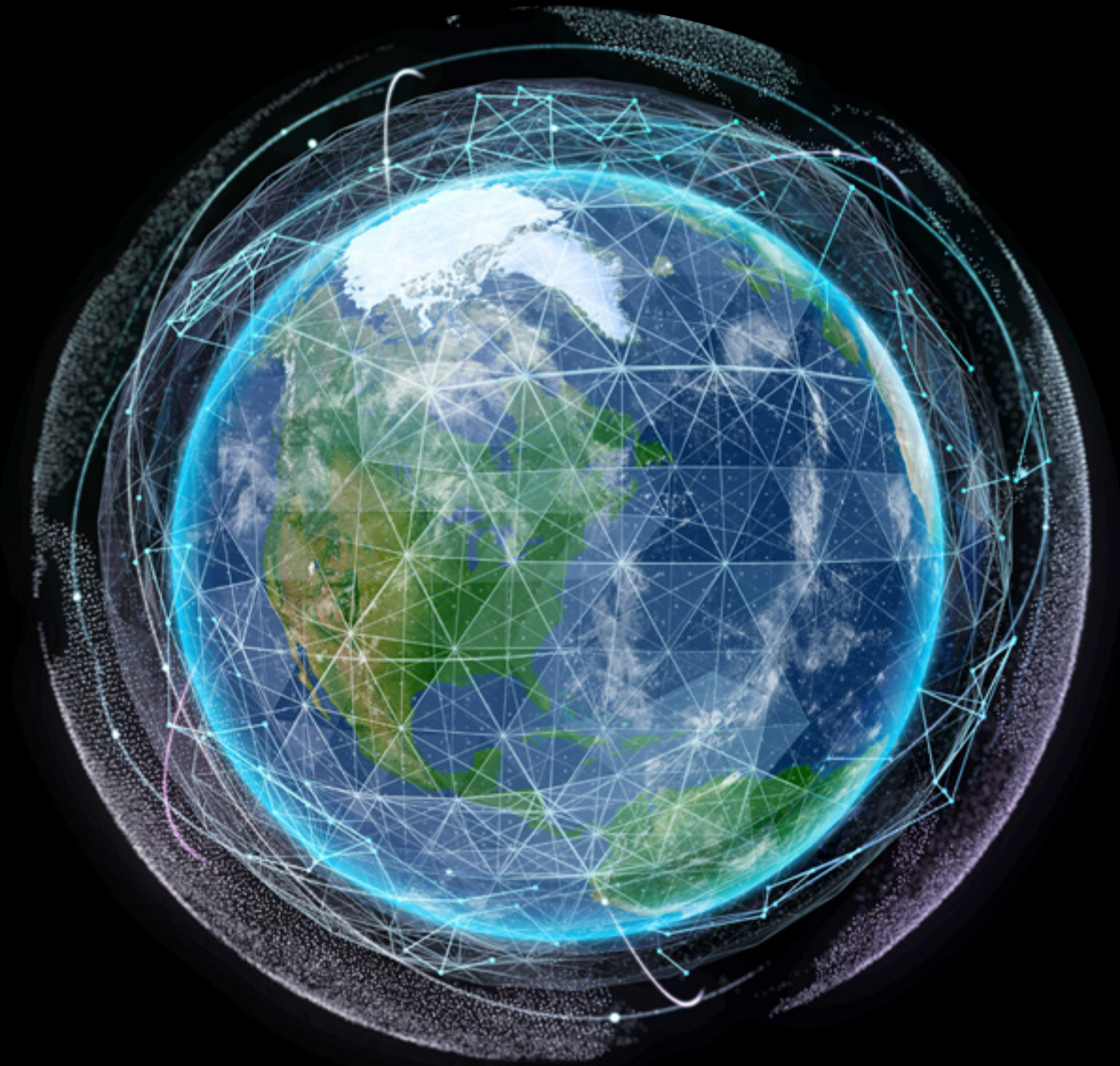


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Global In-House Centers

Mitigating Risks. Enhancing Reputation. Optimizing Returns.

Global in-house centers in India – from cost drivers to business enablers



1990s

Global in-house centers (GICs) were first established in India during the late 1990s with a focus on cost reduction by utilizing inexpensive technical resources and relatively affordable real estate.



2000
onwards

In the next decade, GICs in India expanded their horizons and evolved from providing back-end support to becoming multifunctional centers of excellence.



2010
onwards

By 2010, almost 700 GICs had been established in India after rapid expansion, and a paradigm shift occurred with GICs becoming value creators instead of cost centers, providing value-added services through innovation in service delivery and management with a clear vision of becoming centers of excellence for better productivity and efficiency. India currently has over 1,000 GICs operating across numerous sectors¹, including IT and ITeS, engineering and software development, BFSI, telecom, BPO services, etc., with growing concentration in the aerospace, healthcare, pharma, and biotech industries. In the IT and ITeS sector alone, GICs in India account for US\$19 billion in export revenues (over 20% of the industry export revenue), and employ over 7,00,000 people.

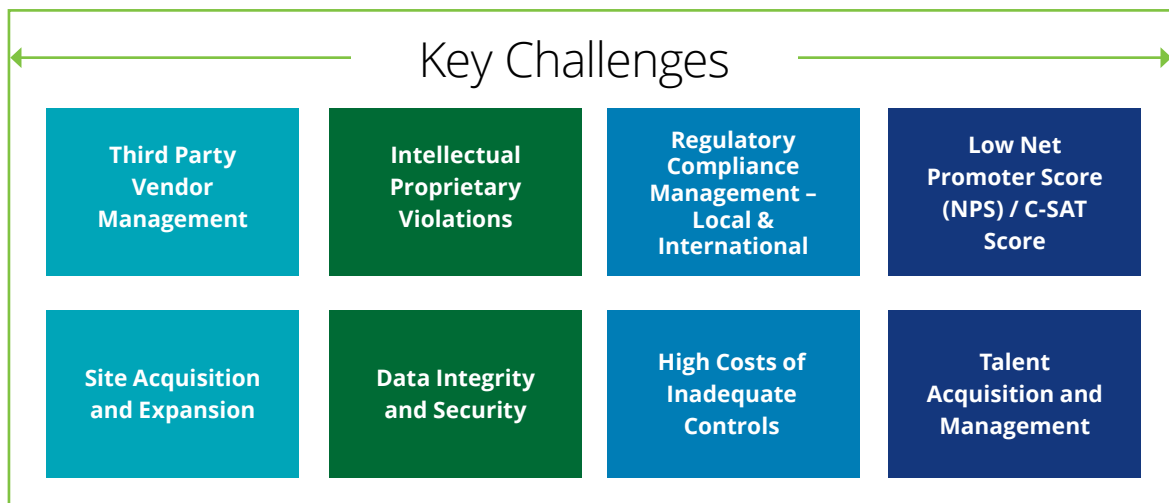
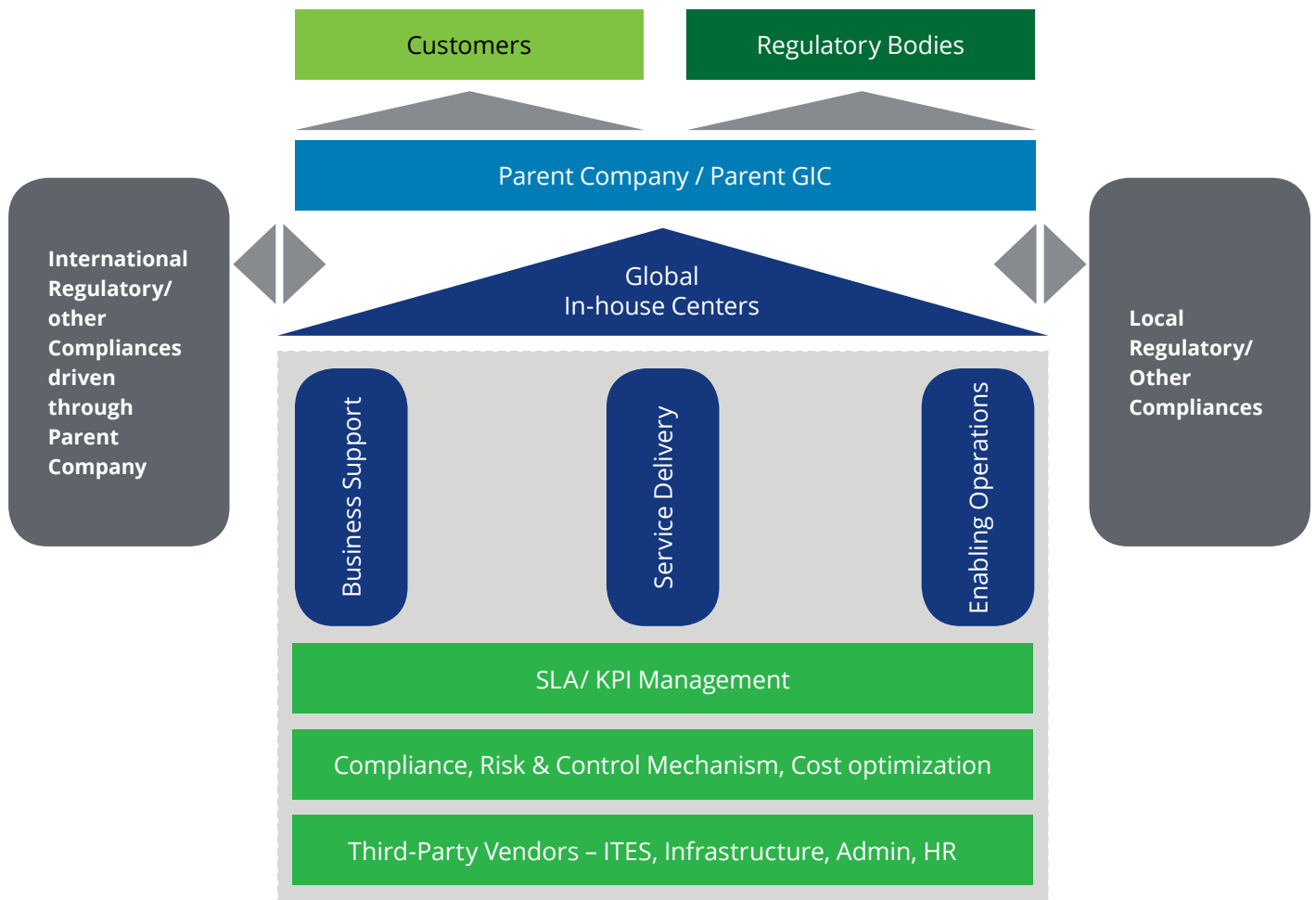


The
future

The future of GICs in India is very promising. The 'shared service center' tag is all set to change as GICs become strategic centers with better leadership from the parent organizations and global transparent governance. At times, the growth in GICs may have been accompanied by rising exposure to fraud, misconduct, and non-compliance, along with operational challenges such as difficulty in retaining skilled employees, productivity and quality issues, rising costs and augmentation of robotics, but GICs are working to overcome the challenges and are likely to continue growing rapidly.

¹Sources: <https://www2.deloitte.com/content/dam/Deloitte/us/Documents/process-and-operations/us-sdt-taking-global-in-house.pdf>, <http://www.nasscom.in/global-in-house-centres>

A complex ecosystem consisting of multiple stakeholders poses diverse challenges



Vulnerabilities affect the GIC value chain in varying degrees



We have tailored our services portfolio to address the critical challenges facing GICs in India



- Code of conduct and anti-fraud policies
- Whistle-blower hotline management
- Fraud incidence response, including cyber incidents
- Ethics trainings and certifications
- Fraud risk assessment and management



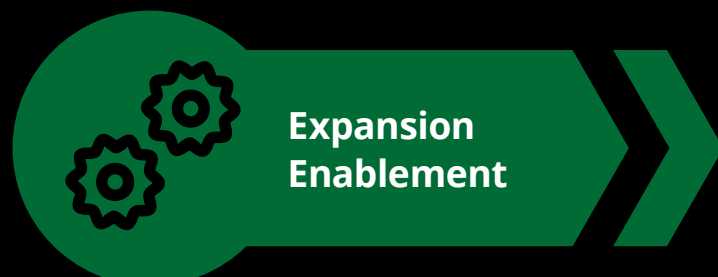
- Vendor contract management
- Customer contract compliance review
- Dispute advisory



- Vendor risk dashboard, vendor spend analytics
- Facility management analytics, recruitment analytics
- Goodwill gesture and refund analytics
- Anti-counterfeit analytics (FMCG, pharmaceuticals)
- Network analytics (telecom)



- International and national regulations – policy, training and investigations
- Anti-bribery and anti-corruption advisory (FCPA/UKBA, etc.)
- Anti-money laundering advisory
- Anti-sexual harassment program management



- CapEx spend analysis
- Campus program monitor
- Information dashboard

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