AIM Research
Penetration Maturity (PeMa) Quadrant

Top GCC Enablement Service Providers 2025

PeMa Study Guide

September 2025

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Table of Contents

Introduction to AIM Research PeMa (Penetration & Maturity) Quadrant

AIM Research's Penetration and Maturity (PeMa) Quadrant for GCC Enablement Service Providers is a reliable industry standard to evaluate vendor competencies and strategies, and aid businesses in choosing the most suitable GCC Enabling Service Provider aligned to their business needs. The PeMa report aims to empower decision-makers with the knowledge required to select the right GCC Enabling Service provider for their unique requirements. Through an exploration of market dynamics and vendor profiles, we provide a comprehensive map for navigating the GCC Enabling Service landscape, ensuring that organizations can harness the full potential of GCC Enabling Service to transform their operations and stay competitive in the digital age.

Figure below provides a glimpse of the PeMa Quadrant: GCC Enablement Service Providers 2024 report.

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PeMa Quadrant
GCC Service Providers 2024

SEASONED VENDORS / LEADERS

- ANSR
- EY
- Zinnov
- Torry Harris
- Quess Corp
- PwC
- Opteamix
- SMC Squared
- HCL
- NLB Services
- Nexdigm
- Deloitte
- Optimum Solutions
- Innova Solutions
- KPMG

CHALLENGERS / GROWTH VENDORS

- SimplyBiz
- MindPool Technologies
- SA Technologies
- Q3 Technologies
- TekWissen
- JSS Pro
- Gaian Solutions
- GoodWorks CoWork
- Azilen
- Sedin Technologies
- DataToBiz
- Deqode
- TrueFirms
- Fidel Softech

MATURITY (Ma)

PENETRATION (Pe)

AIM Research PeMa Quadrant Methodology

PeMa Quadrant Scope and Methodology

- The AIM Penetration and Maturity (PeMa) Quadrant is aimed at evaluating vendors' capabilities across the GCC enabling services spectrum. By focusing on two crucial dimensions: Penetration, which assesses the extent of market adoption and reach, and Maturity, which evaluates depth of experience, and breadth of service offerings, AIM Research offers an insightful analysis of vendors.

- This dual-axis evaluation not only highlights each company's unique approach to delivering world-class services but also categorizes them into four distinct segments: Leaders, Seasoned Vendors, Challengers, and Growth Vendors. Each segment signifies a different stage of evolution and market impact.

- Vendors are assessed on critical aspects such as company growth, breadth of offerings, customer confidence, market presence, platform solution maturity, tech advancement, recent activity, and ease of use.

- It is important to note that the PeMa Quadrant analysis is primarily based on responses submitted by the participating vendors through the PeMa questionnaire, briefing calls, and feedback from their clients. This information will also be supplemented by secondary research.

- Participating vendors are asked to share at least two client client references for recent GCC enabling projects. AIM Research then collects structured feedback from these clients across parameters such as problem understanding, solution effectiveness, execution quality, business impact, communication, overall satisfaction, likelihood to recommend, and suggested improvements.

Outcomes & Benefits

Benefits for For End Users (GCCs, GCC Leaders)

- Informed Decision–Making. Helps evaluate and shortlist vendors based on objective criteria like ability to execute and completeness of vision.
- Market Landscape Clarity. Offers a high–level view of how vendors compare across a market.
- Risk Mitigation. Reduces the risk of selecting underperforming or misaligned vendors by understanding their strengths and cautions.
- Future Roadmap Alignment. Assesses whether a vendor's vision aligns with the buyer's long–term growth goals.
- Negotiation Leverage. Supports stronger vendor negotiations by using quadrant findings to back decisions and pricing discussions.
- Peer Validation. Reinforces internal decisions with third–party validation, making it easier to gain leadership or board buy–in.

Benefits For Vendors (GCC Enabling Service Providers)

- Market Visibility & Credibility. Being included in the quadrant enhances credibility and builds trust with prospects and partners.
- Competitive Benchmarking. Offers insights into how the company stacks up against key competitors in capabilities and vision.
- Sales Enablement. Acts as a powerful marketing and sales tool—especially for those placed in the Leaders or Visionaries quadrant.
- Customer Confidence. Reassures current and potential customers of the vendor's stability, strategy, and execution capability.
- Strategy Validation. Serves as a third–party validation of the company's roadmap, market understanding, and innovation efforts.
- Investor & Partner Engagement. Influences investor perception and strengthens partnership discussions by showcasing independent analyst recognition.

Past PeMa Quadrant Reports

Explore the past PeMa Quadrant reports here
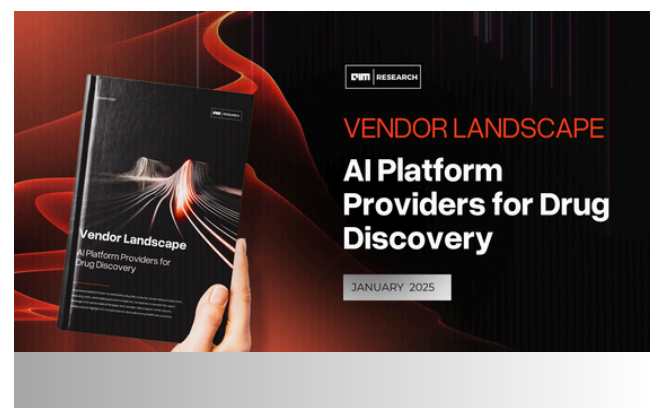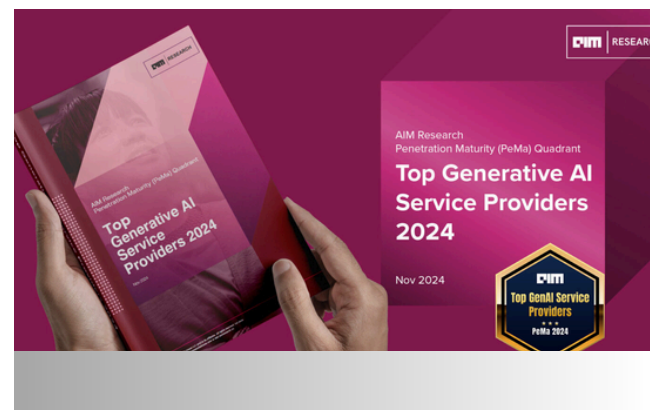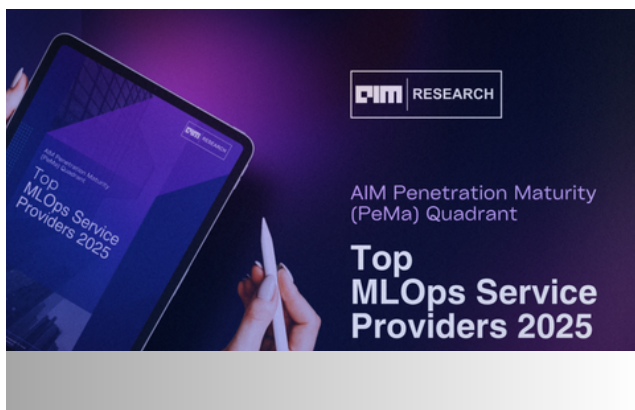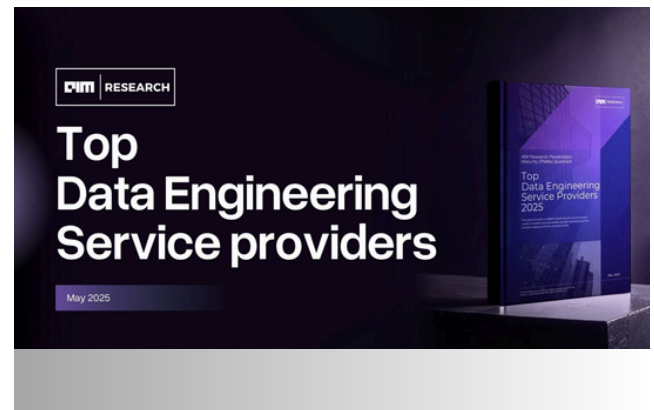
Click on interested images to explore further

Overview of GCC Enabling Service Providers
PeMa Quadrant

Defining GCC Enabling Services

- GCC Enabling Services are offerings that help enterprises plan, launch, scale, and mature Global Capability Centers by aligning strategy, operating models, talent, and infrastructure with business goals. Providers provide a mix of services and sometimes orchestrate the full lifecycle – from portfolio and location strategy to entity setup, incentives, compliance, recruitment, HR operations, workplace and IT security – so centers deliver reliable capacity and strategic value.
- These services have evolved from one–time setup support to integrated, outcome–driven programs that span strategy and business case development, city and site selection, legal and regulatory enablement, employer branding, hiring and onboarding, policy design, finance and payroll, procurement, and vendor governance. They also include capability build–out across engineering, analytics, cybersecurity, finance, and customer operations; CoE formation; automation and AI adoption; and program management for scale.
- The focus has shifted from opening a center to sustaining performance: faster time–to–stand–up, resilient operations, leadership pipelines, measurable productivity, and innovation throughput tied to global objectives. Modern GCC enablement emphasizes data privacy and security, regulatory compliance, ESG and DEI practices, robust business continuity, and standardized governance with clear KPIs—ensuring transparency, trust, and durable enterprise value.

What counts as a GCC Enabling Project?

- Projects that establish or mature a Global Capability Center's foundations and operating model such as location and entity setup, regulatory enablement and incentives, hiring and employer branding, workplace and IT/security readiness, transition and stabilization, governance and KPIs, CoE formation resulting in faster stand–up, compliance readiness, talent ramp–up, resilience, and scale.

What doesn't counts as a GCC Enabling Project?

- Work typically delivered by firms without a structured GCC–as–a–Service model such as analytics specialists or PR agencies–focused on specific outputs like feature builds, content, routine analytics, or one–off projects, without impacting GCC setup or operating maturity.
- Pure–play legal service firms fall outside the defined scope of this report.

Services LifeCycle

No	Stage	Key Activities
1	**Feasibility Study & Market Analysis**	Assessing the need and potential for a GCC, including talent availability, cost-benefit analysis, and geographical advantages.
2	**Site Selection**	Identifying and securing the right location based on factors like talent pool, infrastructure, and operating costs.
3	**Legal & Regulatory Compliance**	Navigating local legal frameworks, regulatory requirements, tax incentives, and labor laws.
4	**Infrastructure Setup**	Physical and technological infrastructure, including office spaces, IT systems, data centers, and network setup.
5	**Technology & Digital Enablement**	Implementing digital transformation tools, cloud services, security protocols, and other IT services necessary for GCC operations.
6	**Operations & Process Setup**	Defining and implementing workflows, knowledge transfer, operational frameworks, and governance structures.
7	**Change Management & Training**	Managing transitions, providing training programs, and change management strategies to ensure smooth adoption of GCC processes.
8	**Performance Management & Monitoring**	Establishing KPIs, monitoring performance, and continuous optimization of GCC operations for efficiency.
9	**Vendor & Partner Management**	Managing third-party service providers, technology partners, and ensuring seamless integration of external resources.
10	**Scaling & Future Growth Planning**	Roadmap for expansion, scaling operations, adding new capabilities, and aligning with long-term business goals.
11	**Cost Optimization & Financial Management**	Budget planning, cost control, and financial management to ensure the profitability of GCC operations.

Vendor Evaluation Criteria

Market Penetration Index:

No.	Index	Focus Area	Representative Questions / Indicators	Weightage
1	**Delivery Scale and Financial Health**	Project volume and execution	• GCC service offerings • Number of GCC clients (by vertical/region/scale: Large, Medium, and Small size GCCs) • Engagement model with GCCs • Specialized GCC functions (AI, Automation, Cybersecurity, CoEs) • Revenue (FY 2023–24 & FY 2024–25, with breakdown across sectors and scale) • Average deal size • GCC workforce in India (current & added in FY 2024–25) • Share of workforce in specialized roles	High (35%)
2	**Growth**	Revenue growth, Talent growth, Footprint	• GCCs set up in 2024 & 2025 • 3–year growth forecast for GCC services • Client scope expansions in last 12 months • Fastest–growing services (FY 2024–25 vs FY 2023–24) • Fastest–growing industry verticals • Growth from specialized functions • Growth from emerging GCC locations	High (25%)
3	**Customer Confidence**	Client Base & Engagement Models	• Client satisfaction (NPS/CSAT + references) • Multi–function client expansion • Exclusive/preferred partner status • Client retention period	High (25%)
4	**Market Outreach**	Go–to–market and presence	• Ecosystem partnerships for GCC setup & scaling • Client base by region (North America, Europe, APAC) • Thought leadership & brand visibility in GCC ecosystem • GTM strategy for customer acquisition & expansion	Medium (15%)

Vendor Evaluation Criteria

Service Maturity Index:

No.	Index	Focus Area	Representative Questions / Indicators	Weightage
1	**Capability & Talent Depth**	Productivity, Skill and Cost	• Pricing models vs market standards • Cost efficiency & productivity benchmarks • Attrition management in GCC projects • Cross-skilled workforce percentage • Upskilling investments for GCC talent (AI, digital, domain)	High (40%)
2	**Scalability & Transformation Agility**	Frameworks, models and KPIs	• Average time to scale GCCs (setup to 500+ employees) • Client transitions from transactional to strategic value • Frameworks/governance models for digital & AI transformation • Measuring and tracking GCC maturity • Automation, AI accelerators, and proprietary frameworks • Quantified transformation outcomes (cost, cycle time, AI adoption) • Standardized playbooks vs custom models • Co-innovation with GCC clients • Case study of scaling GCC from setup to maturity	High (30%)
3	**Future Planning**	Long-term strategy, new service lines, innovation pipeline	• Plans to evolve/expand GCCaaS offerings (3—5 years) • Priority industry sectors for GCC growth • Target GCC size segments (Large, Medium, Small Size GCCs) • Expansion cities/states (2—3 years) • Projected workforce increase (2—3 years) • Ecosystem & partnership adaptation (next 2—3 years) • Technology platforms & accelerators for future-proofing	High (30%)

Scoring Methodology

Scoring: Vendor responses are first assigned scores based on predefined evaluation criteria for each question.

Weighting: Each question is assigned a weight based on its importance. These weights are applied to the scores to get weighted scores.

Normalization: The weighted scores are then normalized to a 0—1 scale, allowing fair comparison across vendors and dimensions.

PeMa Scores: Normalized scores are averaged separately across Market Penetration and Service Maturity dimensions.

Quadrant Mapping: Vendors are plotted on the PeMa Quadrant based on their final Penetration and Maturity scores.

Participation Guidelines

Who should respond: Senior leaders responsible for India GCC enablement with visibility into capabilities, client work, and growth plans e.g., Delivery/Operations Heads, Practice Leads, Solutions/Pre–sales, Sales/Alliances (India GTM), Strategy/PMO. Where relevant, inputs from Legal/Tax/CS, HR/TA, and IT/Security may be consolidated by the lead respondent.

Single submission per organization: Provide one consolidated company response for consistency. Multiple stakeholders may collaborate internally, but the final submission should come through a single point of contact (SPOC).

Voluntary but encouraged: Participation is free and enables inclusion in the PeMa Quadrant (India) and related insights. Participants may repost the original LinkedIn post. Recreating or adapting the Quadrant, badge, or report for external use requires a license; licensing fees apply for marketing usage.

Response format: Submit via the official online survey link. Optional supporting documents (case studies, references, certifications) can be emailed to the research team.

Evaluation approach: Final assessment will combine survey (RFI) responses with briefing calls. Clarifications and evidence (e.g., references, approvals, metrics) may be requested as needed.

PeMa Study Timeline

Start Week: 4 September 2025

Phase	Duration	Description
Form Launch & Vendor Outreach	3-4 Weeks	Survey form goes live. Initial communication begins, including clarification sessions to guide vendors through participation.
RFI Submission	4—6 Weeks	Vendors complete and submit the Request for Information (RFI), detailing their capabilities and experience.
Briefing Calls	3—4 Weeks	One-on-one calls conducted to elaborate on RFI responses, validate data, and gather deeper insights.
Analysis & Report Preparation	2—3 Weeks	Vendor data is evaluated across PeMa metrics to determine quadrant placement. Insights are compiled and the final PeMa Quadrant and vendor profiles are published.
Debriefing	1—2 Weeks	Optional feedback sessions offered to vendors to explain their positioning and share observations.

Overall Duration: 3–4 Months

Invited Players (Representative List)

Note: The current list of invited players is an indicative representation based on preliminary research. It will be expanded as the study progresses to ensure comprehensive market coverage.

Accenture	CBRE	Fidel Softech
Aeries Technology	CGI	Firstsource
Alcor	Coforge	Futurefactor360
Allegis Global Solutions	Cognizant	Gaian Solutions
ANAROCK	Colliers India	Genpact
ANSR	CSC	Glopax
Astravise Services	Cushman & Wakefield	GoodWorks CoWork
Auxis	Cybage	Grant Thornton Bharat
AZB & Partners	Datamatics	HCL
Azilen	DataToBiz	Hexaware
Bahwan CyberTek (BCT)	Deloitte	IBM
BDO India	Deqode	InCorp India
BridgePath Innovations	Dexian	Infosys
Capgemini	EdgeVerse	Innova Solutions
CaptiveAide	EY	Inspiredge

Invited Players (Representative List)

Note: *The current list of invited players is an indicative representation based on preliminary research. It will be expanded as the study progresses to ensure comprehensive market coverage.*

JLL	PwC	Supersourcing
Jss Pro	Q3 Technologies	Systems Plus
KGiSL	Qatalys	Tech Mahindra
Knight Frank India	Quess Corp	Tekwissen
KPMG	Randstad Digital	The Scalers
Krtya	RSM	TMF Group India
LTIMindtree	S A Technologies	Torry Harris
MindPool Technologies	Savills India	True Firms
Nexdigm	Sedin Technologies	Vestian
NLB Services	Nomura	Vistra India
Opteamix	SimplyBiz	Wipro
Optimum Solutions	SLK Software	Yash Technologies
Persistent Systems	SMC squared	Zinnov
Publicis Sapient	SRKay	ZS Associates

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advice and tools to lead their digital
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yourself better to make decisions on AI
capabilities