

STATE OF HEALTHCARE & LIFE SCIENCES GCCs IN INDIA



State of Healthcare & Life Sciences
GCCs in India

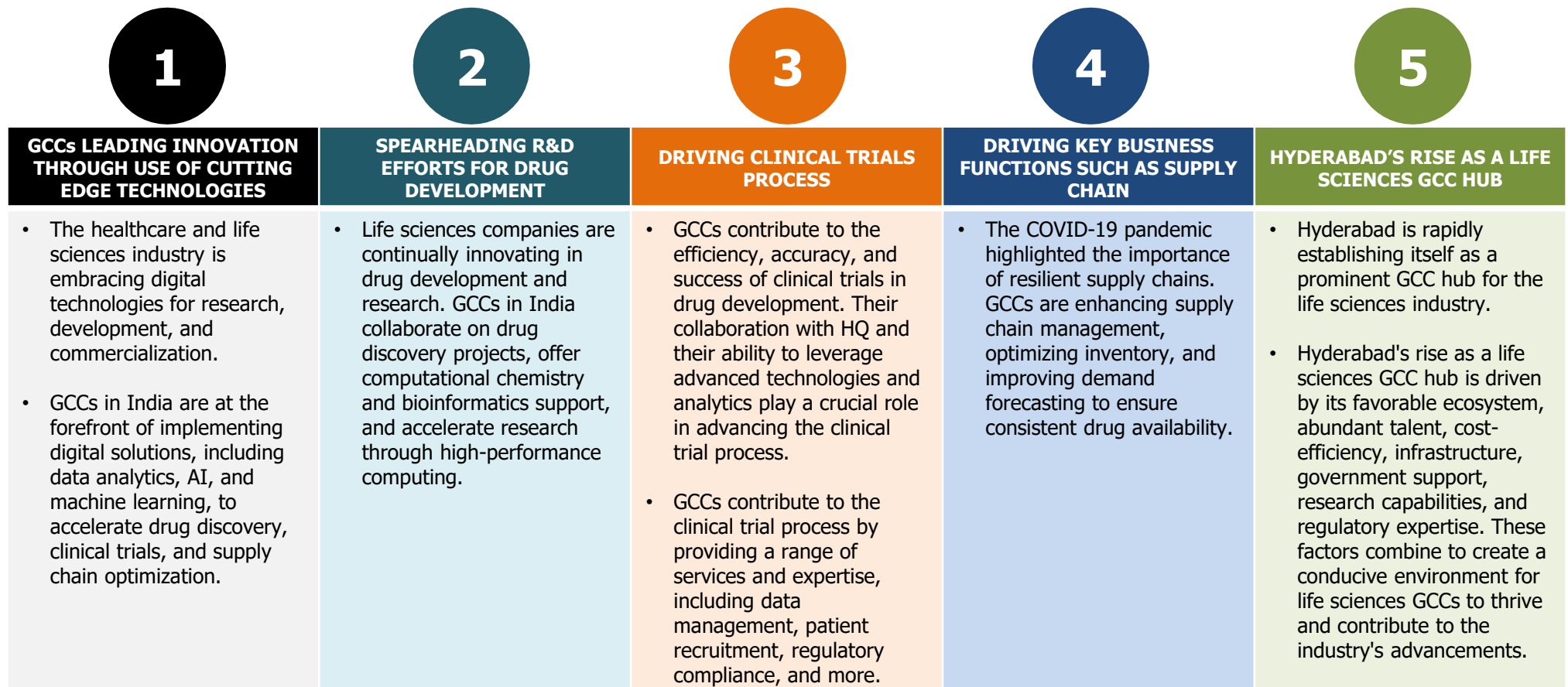
Table Of Contents

- 
- 01 Healthcare & Life Sciences GCCs in India – Navigating The Landscape
 - 02 Healthcare & Life Sciences GCCs In India – Function Maturity & Talent Landscape
 - 03 Healthcare & Life Sciences GCCs In India – Success Stories
 - 04 Healthcare & Life Sciences GCC Value Proposition –Case Studies

HEALTHCARE & LIFE SCIENCES GCCs IN INDIA – NAVIGATING THE LANDSCAPE



Healthcare & Life Sciences GCCs are driving innovation





The Healthcare & Life Sciences GCCs are flourishing in India

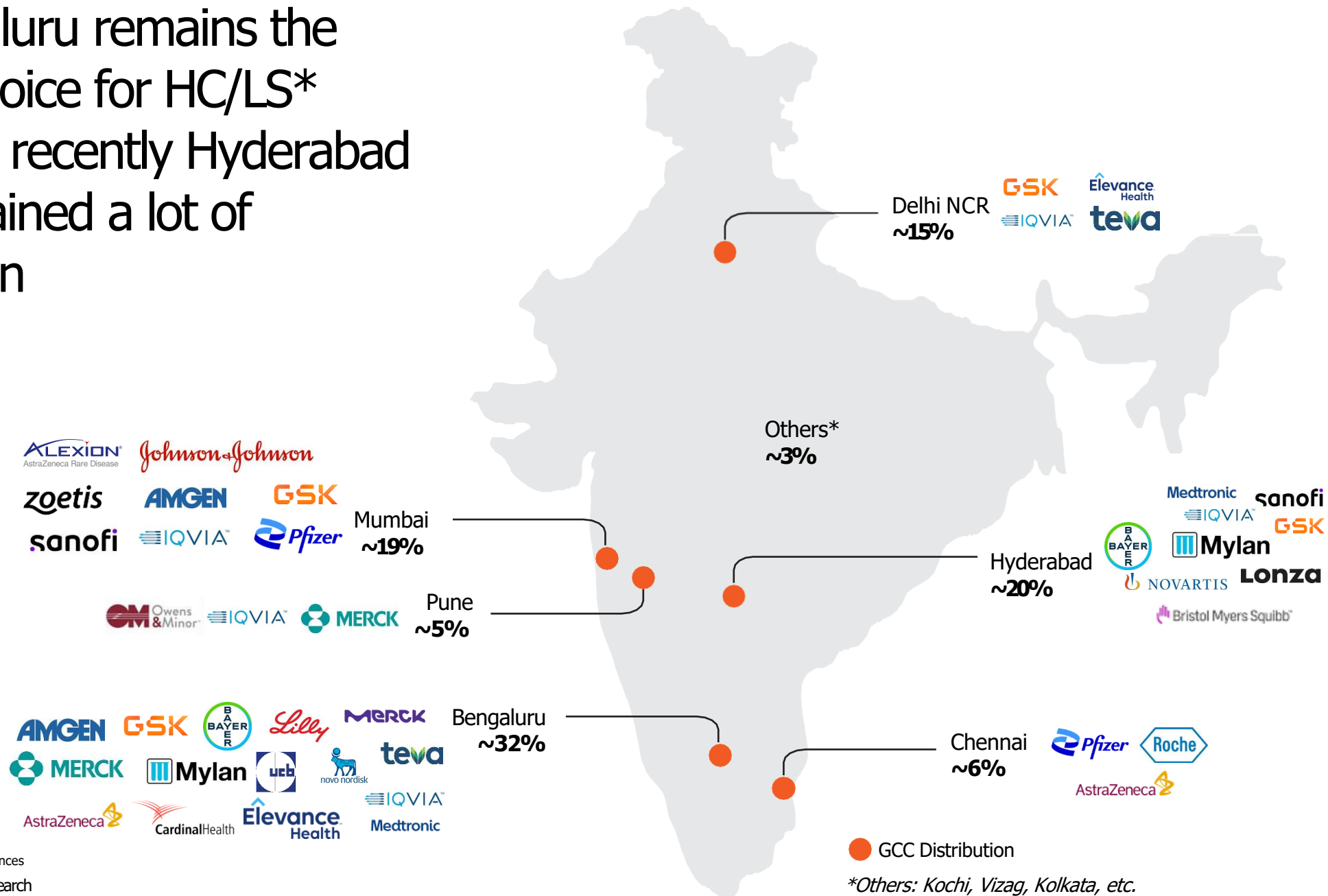
- Over **15%** of all **GCC employees** in India work in the **Healthcare & Life Sciences** Sector
 - More than **55%** of the total Healthcare & Life Sciences GCCs in India are **US-headquartered**
 - **~85%** of the total Healthcare & Life Sciences GCCs are established in Bengaluru, Hyderabad, Mumbai, and Delhi/NCR
 - **~20%** of Healthcare & Life Sciences GCCs have their centers in **3 or more cities**
 - **Bengaluru ranks first** in terms of Healthcare & Life Sciences GCCs across India, with **~33%** of the GCCs followed by Hyderabad and Mumbai
 - In recent times, **Hyderabad** has emerged as a prominent destination for GCCs within Healthcare & Life Sciences sector. Attractive govt. incentives, infrastructure, and talent availability make the city favorable destination for Life Sciences companies
- 

World-leading Healthcare & Life Sciences orgs setup GCCs in India



From early 2000s, some of the world's largest Healthcare & Life Sciences companies have set up GCC operations in India. They have made significant investments in building digital capabilities and accelerate innovation.

Bengaluru remains the top choice for HC/LS* GCCs; recently Hyderabad has gained a lot of traction



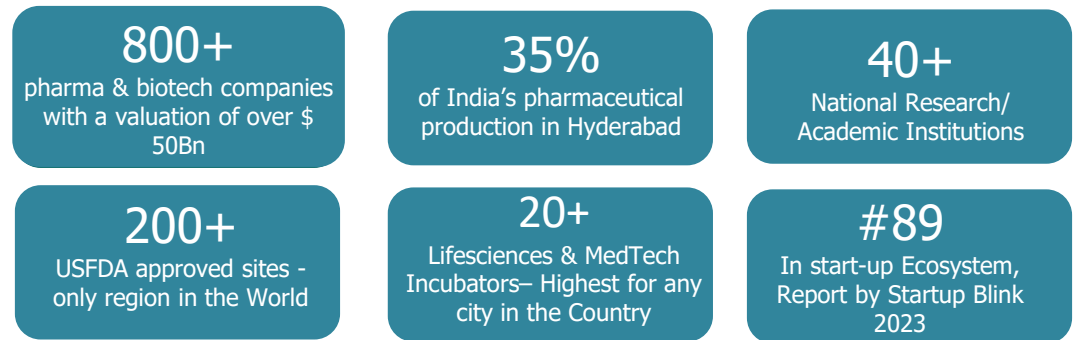
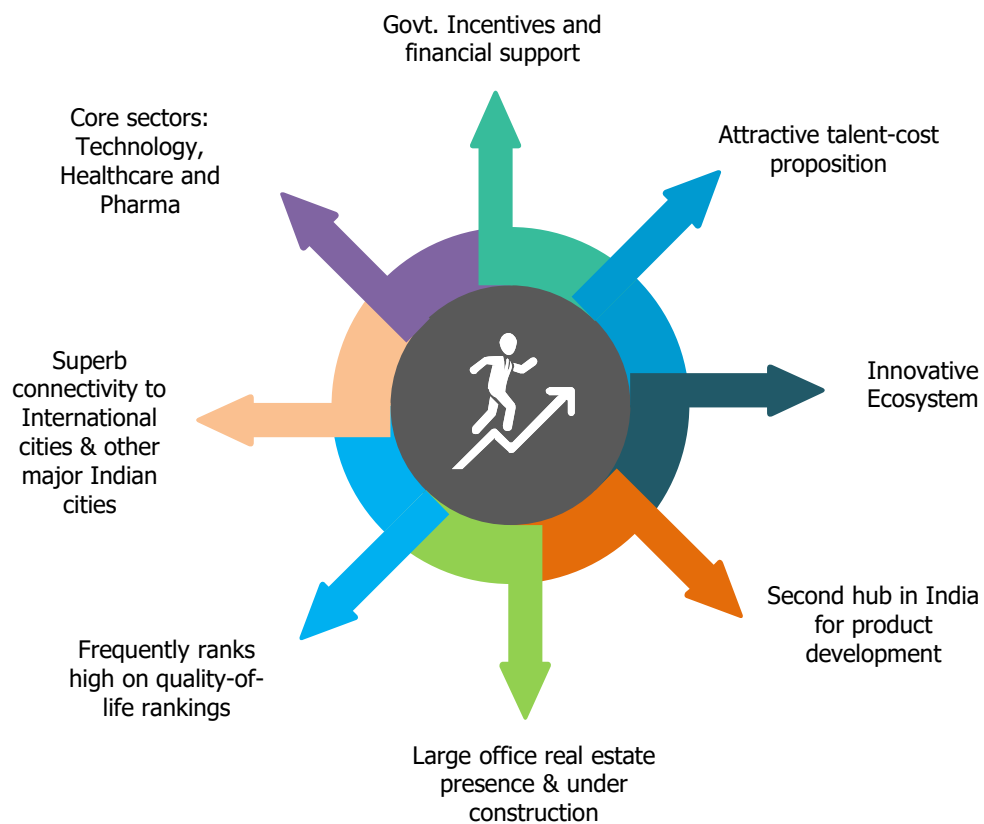
*Healthcare & Life Sciences

Source: ANSR Research

Hyderabad: Empowering Healthcare & Life Sciences GCCs



Hyderabad: Value Proposition

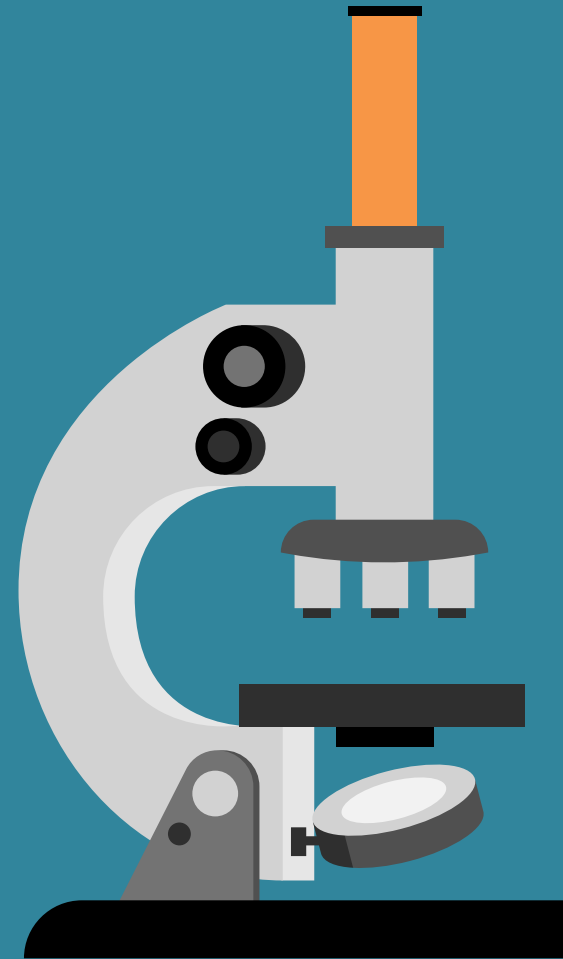


Dedicated Clusters:

- **Medical Devices Park:** India's largest MedTech park with 50+ companies
- **Genome Valley:** India's first and largest life sciences R&D & manufacturing cluster with 200+ companies
- **Hyderabad Pharma City:** World's largest integrated pharma cluster under development. Feature an integrated ecosystem for pharma R&D & manufacturing

HEALTHCARE & LIFESCIENCES GCCs IN INDIA

– FUNCTION MATURITY & TALENT LANDSCAPE



Healthcare & Life Sciences GCCs are driving tech & digital and key business & corporate functions

Technology & Digital



Big Data & Analytics



IT Infrastructure & Cloud



Healthcare IT



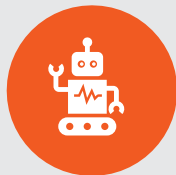
Cybersecurity / NOC / SOC



Application Development & Maintenance (ADM)



AI / ML



Automation & RPA



Internet of Things

Core Healthcare and BPM



Drug Discovery & Development



Clinical Research



Data Review



Post-Market Monitoring



Marketing



Finance & Accounting



Supply Chain Management



Human Resource

GCCs in India are playing pivotal role in Drug Discovery & Development process

Drug Development Life Cycle / Stages



- Analytical development, stability studies, formulation development
- Protein engineering
- Medicinal and process chemistry, biologics, bioprocess, drug metabolism, pharmacokinetics, bioanalytical research, and pharmaceutical development
- Research on APIs, OSDs, biologics, injectables

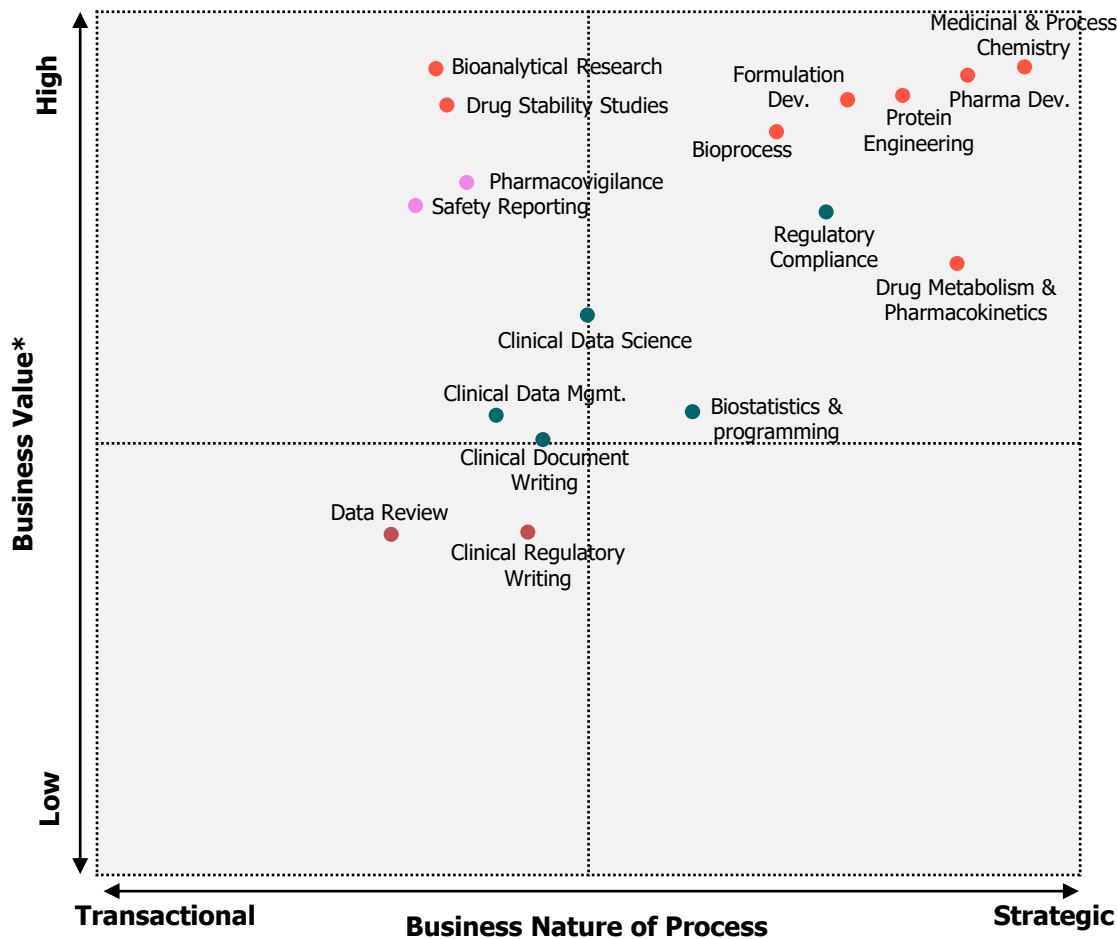
- Clinical data management
- Clinical document writing (involves reporting data from clinical trials)
- Medical communication for clinical trials (includes journal submission; educational material for patients, healthcare professionals; product website content)
- Maintenance of global submissions
- Biostatistics and programming (involves calculating efficient sample size & statistical methods to interpret clinical data)
- Clinical data science
- Regulatory compliance including new product submissions

- Creating data review plan
- Centralized monitoring / review of aggregated clinical, quality, and performance data
- Medical review of regulatory reports and renewal documentation submitted to regulatory agencies
- Clinical regulatory writing (involves preparing regulatory submission documents)

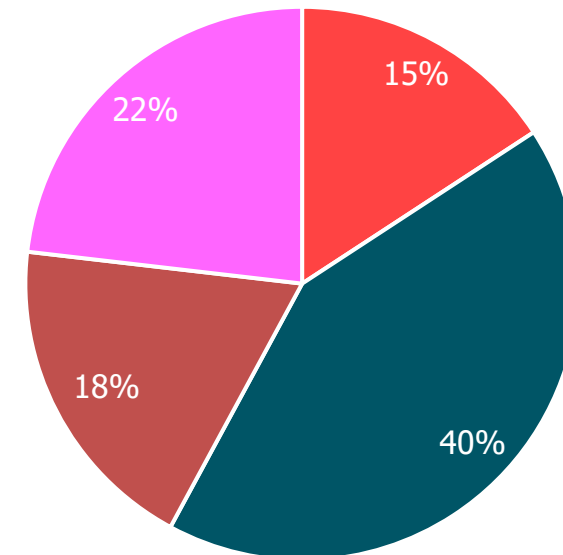
- Pharmacovigilance and risk management planning
- Maintenance of pharmacovigilance system
- Safety reporting (e.g., provide reports to be used during audits & inspections)

Work portfolio mapping of GCCs for Drug Discovery & Development functions

Scatter plot showing service matrix across function's strategic nature & business value



Average distribution of talent pool by work portfolio across GCCs in India



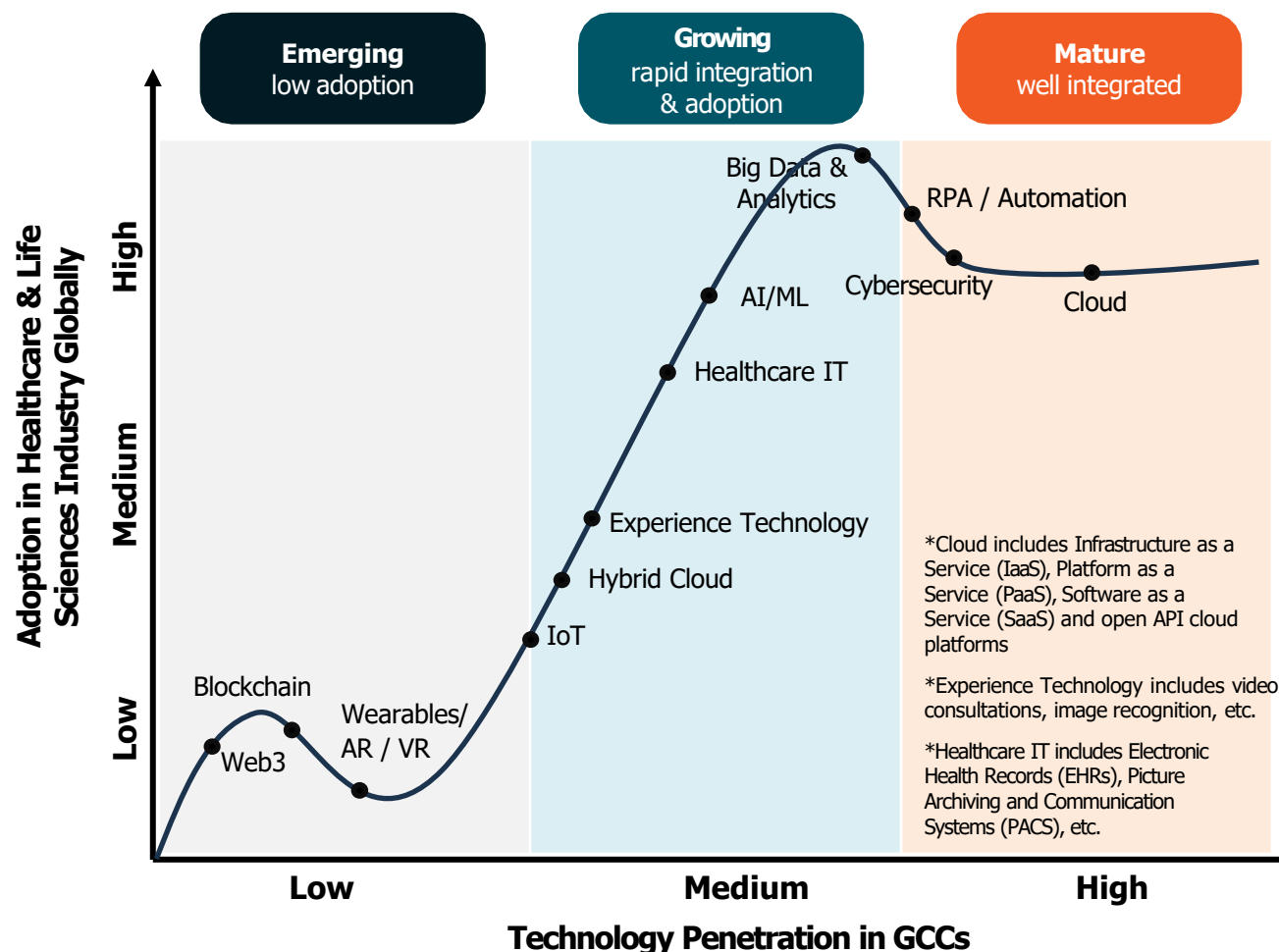
Total Estimated talent pool, Drug Discovery & Development across GCCs in India: ~25-30K

● Drug Discovery & Development ● Clinical Research ● Data Review ● Post-Market Review

Source: ANSR Research

*Contribution towards Efficient Drug Development, Revenue Growth & Profitability

GCCs in India are leading next-gen technology adoption in Healthcare & Life Sciences sector



Big Data & Analytics

Accelerate Drug Discovery and Development

- Analytics predicts data and makes it simpler to drive intelligent decisions for accelerating the process of drug discovery.

Increase the Efficacy of Clinical Trials

- Big data analytics help reduce the cost & speed up the clinical trials by identifying and analyzing various data points.

RPA/Automation

Clinical Trials Management

- RPA enables high-volume tasks related to clinical trials that generate and utilize enormous amounts of data can be efficiently and conveniently performed by intelligent robots.

Patient Matching

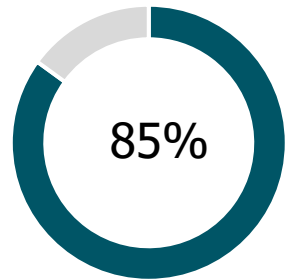
- Finding patients for trials is a bottleneck in clinical research. Finding the best candidates for a life science study by leveraging RPA makes the process faster & easier.

Cloud

Scalable Cloud Capacity enhancing Clinical Trials Management

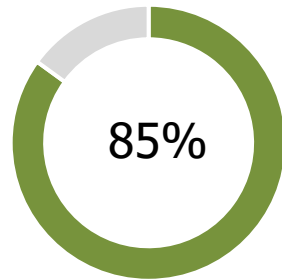
- Conducting clinical trials simulations on premise system is difficult as it is challenging to scale the computational power necessary to run trial simulations on site, by leveraging cloud drugs company have turned efficient.

Penetration of Tech & Digital Services across GCCs



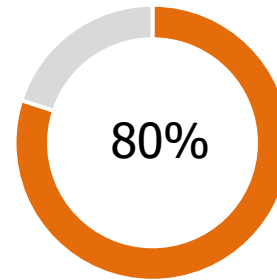
Big Data & Analytics

BI, Data Management, Data Visualization, Data Warehousing, Data Engineering



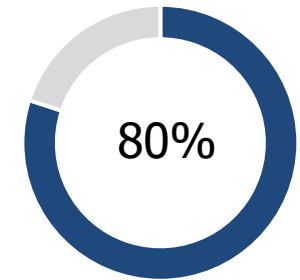
IT Infrastructure & Cloud

Hosting & Network Services, Services Management, Infrastructure Modernization



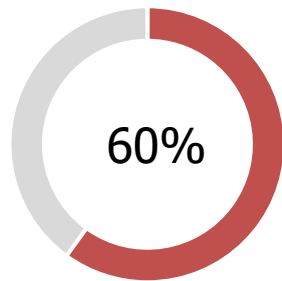
RPA / Automation

Change management, Implementing Digital Transformation



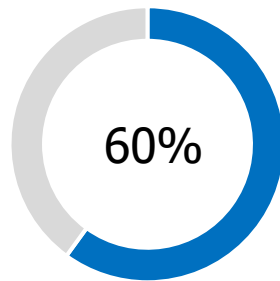
Cybersecurity

Cyber Security Engineering, Threat Hunting, Incident Reporting



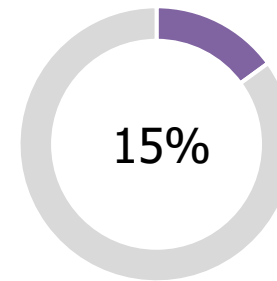
Healthcare IT

Electronic Health Records (EHRs), Picture Archiving and Communication Systems (PACS), Interoperability Standards



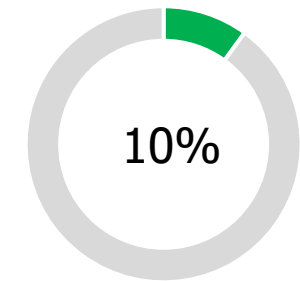
AI / ML

Medical Imaging Analysis, Clinical Trial Optimization, Chatbots, Drug Discovery, Personalized Medicine



Internet of Things

Connect / Wearable Device Management



Blockchain

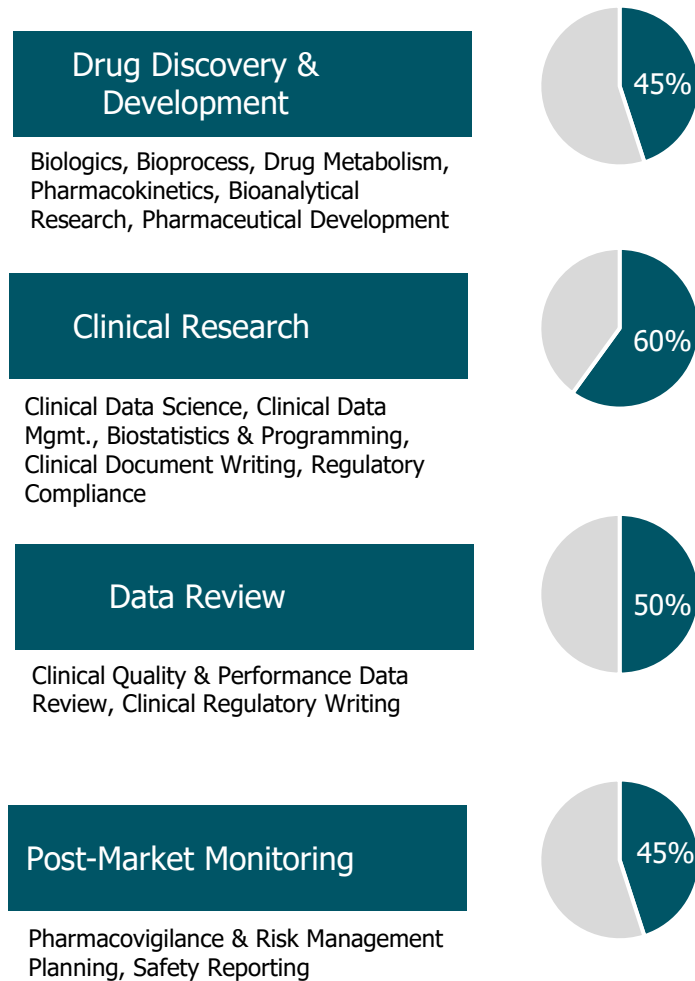
Medical Records, Drug Development, Counterfeit Drug Prevention

Source: ANSR Research

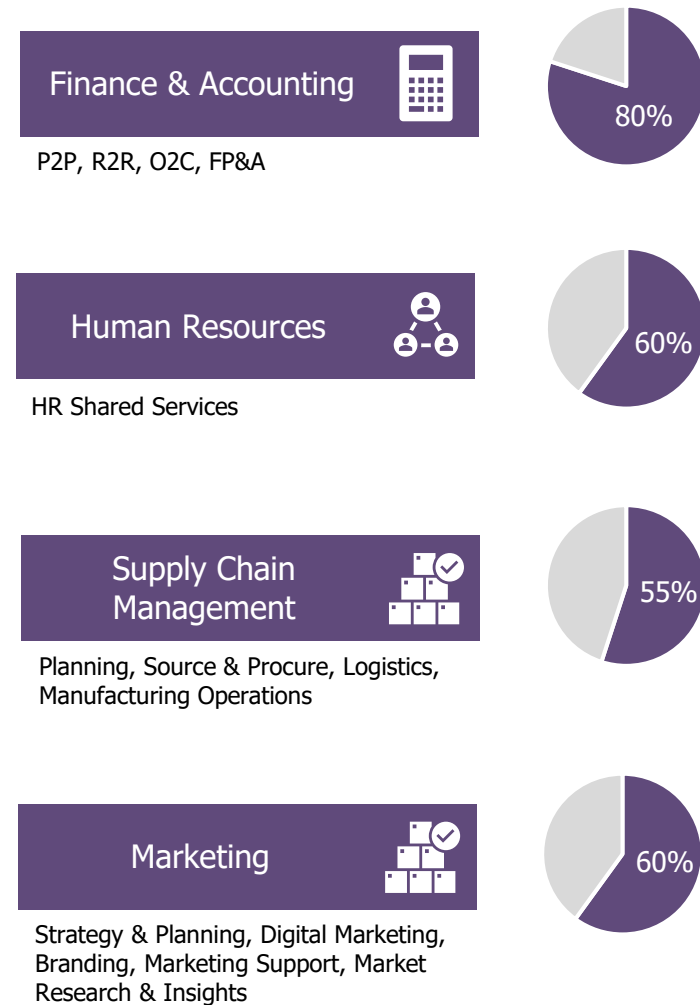
Note: The percentages represent the penetration in # of GCCs in India

Penetration of core business & corporate functions across GCCs

Core Business Functions



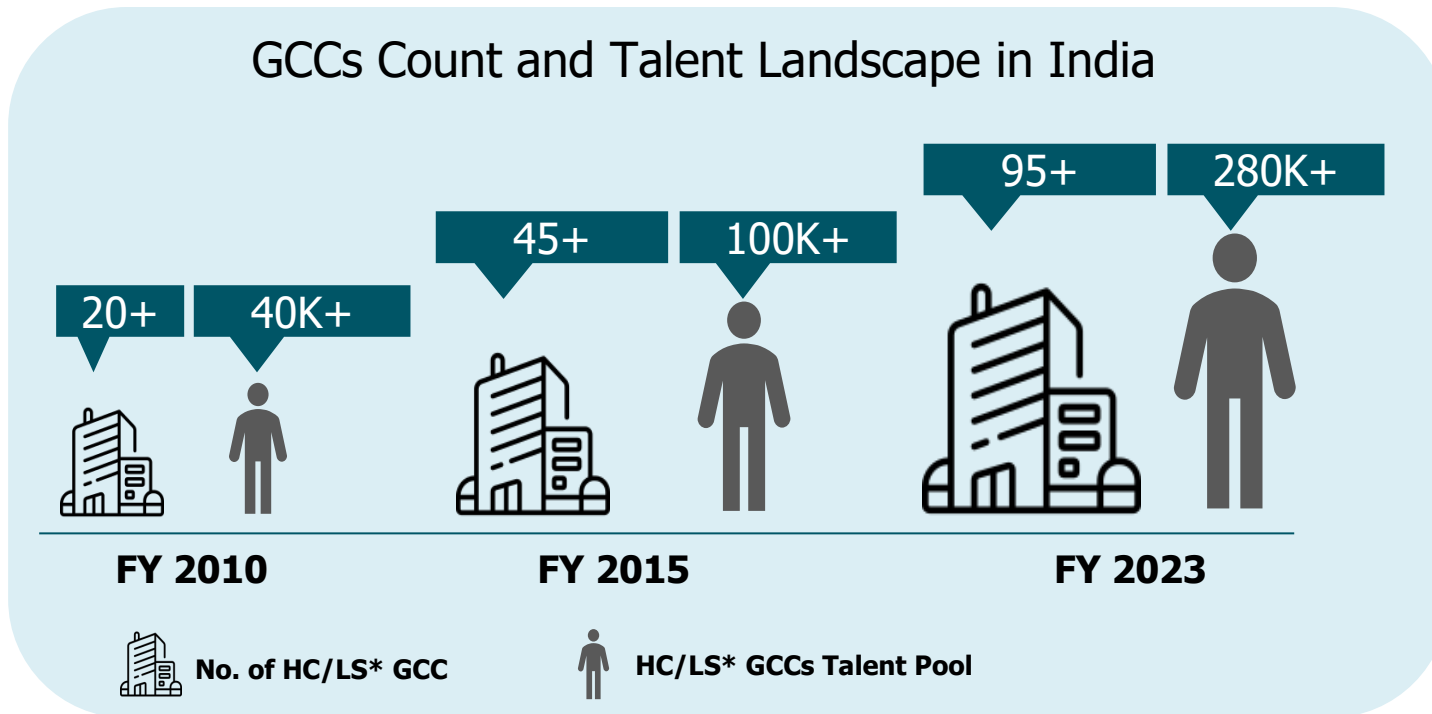
Corporate Functions



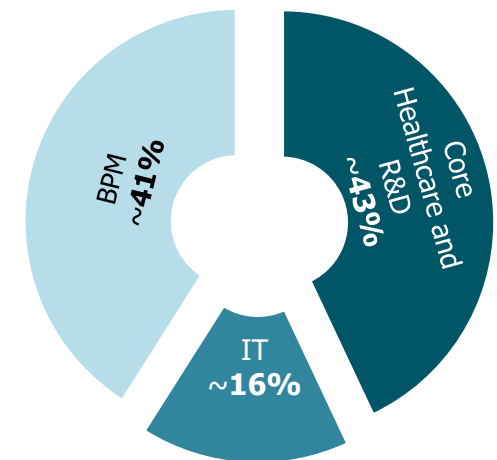
Source: ANSR Research

Note: The percentages represent the penetration of the function in # of GCCs in India

Healthcare & Life Sciences GCC talent landscape



GCC Workforce Split by Function in HC/LS* GCCs (2023)



- Approximately 20% of Healthcare & Life Sciences GCCs have their centers in 3 or more cities in India.
- Top companies based on GCCs headcount in India – Novartis, Pfizer, Abbott, Siemens Healthineers, etc.
- As of 2023, 80+ Healthcare & Life Sciences GCC units employ over 280K people in India.
- Nearly 75% of the total installed talent for Healthcare & Life Sciences GCCs comes from Bengaluru, Hyderabad, and Mumbai.
- Core Healthcare & R&D, IT, and BPM functions constitute nearly 43%, 16%, and 41% of the total installed talent in Healthcare & Life Sciences GCCs, respectively.

*Healthcare & Life Sciences

Source: ANSR Research, NASSCOM

HEALTHCARE & LIFESCIENCES GCCs IN INDIA – SUCCESS STORIES



Building a 600+ strong support center for a multinational healthcare company

About the Company: A Fortune 500 global healthcare & logistics company, it employs over 17,000 people across 70 countries.

GCC Overview

India Inception:
2022

GCC Description:
Global IT Capability Center

Total Installed Talent:
400+

GCC Location(s):
Pune

Challenge:

Hiring 600+ FTEs within 2 years, with initial 400 in 1st year. Lack of on-ground recruitment machinery made it difficult to source and attract skilled technical talent at such a large scale, within an extremely tight timelines.

ANSR's Role:

The company partnered with ANSR to help them hire best talent matching to their requirements.

Approach:

ANSR executed a two-prolonged strategy:

- ❑ **Automated multi-channel sourcing:** In addition to ANSR's global talent network of 1M+ profession, we partnered with Korn Ferry Talent Center in Pune to expand talent pool significantly.
- ❑ **On-ground recruitment drives:** Scaling up ANSR's talent recruitment team enabled to conduct multiple extremely successful hiring drives, with a single drive yielding 100+ interviews.



400+ hires

Within the first year of engagement



100+ interviews

In a single hiring drive



85% accurate

Profile-to-role match, thanks to ANSR's AI-powered screening

Enabling a global healthcare giant's GCC vision

About the Company: An **American multinational** operating in the field of safety, healthcare, and consumer goods, the company employs over 95,000 people across 70 countries.

GCC Overview

India Inception:
2021

GCC Description:
Technology Center of Excellence

Total Installed Talent:
200+ *(as of Nov 2023)*

GCC Location(s):
Bengaluru

Challenge:

Establishing a fully functional global capability center in Bengaluru, India in the absence of any recruitment infrastructure or legal presence in India.

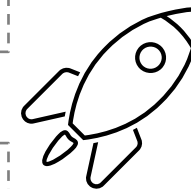
ANSR's Role:

The company partnered with ANSR to set up its center of excellence in Bengaluru, India to power its digital and data analytics capabilities.

Approach:

ANSR provided below solutions:

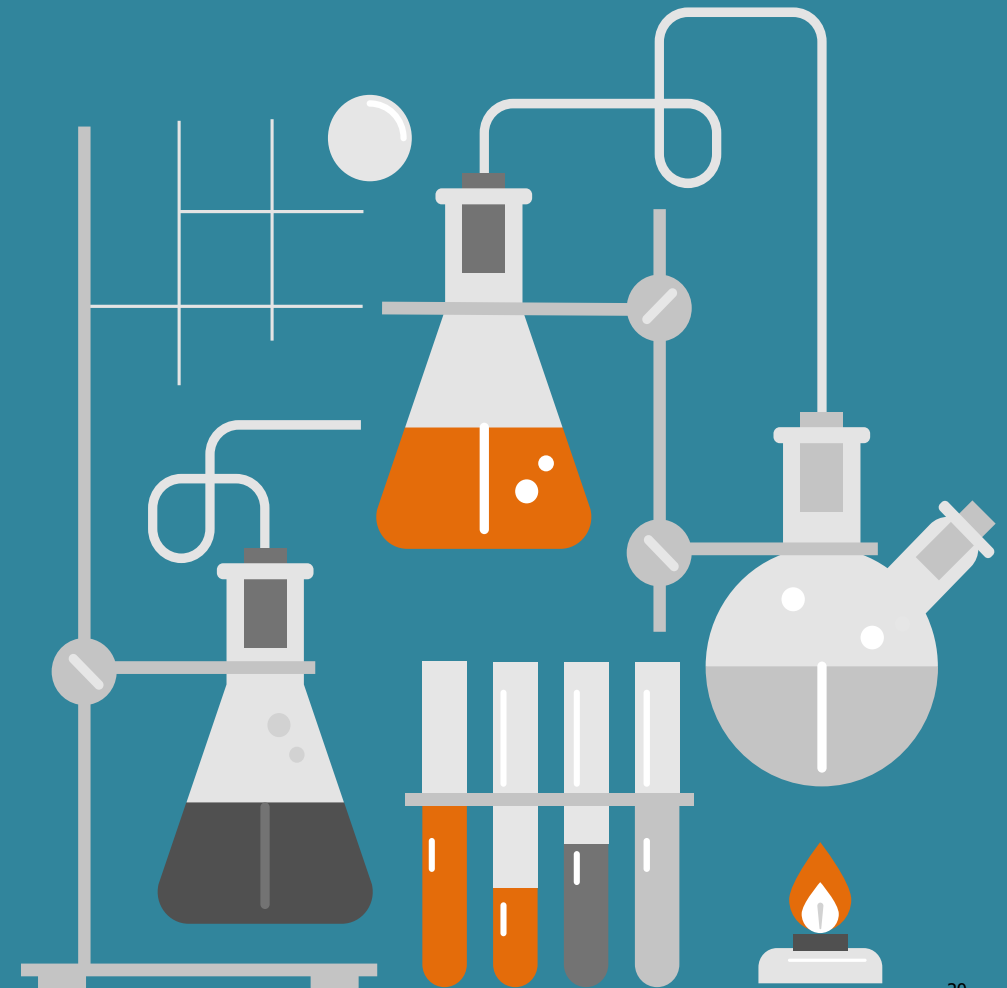
- ❑ **Talent:** Leveraged ANSR's network of 1M+ tech professionals to source candidates with product & analytics background.
- ❑ **Workspace:** Set up fully functional GCC in Bengaluru with ANSR's workspace solution.
- ❑ **Workforce Management:** Undertook the end-to-end talent management – payroll & taxation, employee benefit and administration.



2X Growth

Already **200+** member strong, the India team is set to grow to **400+** by **mid of 2024**.

HEALTHCARE & LIFESCIENCES GCC VALUE PROPOSITION -CASE STUDIES



Healthcare & Life Sciences GCCs top priority: Driving innovation and becoming growth enabler

Healthcare & Life Sciences GCCs in India are evolving, driving research & development, driving business growth, and creating sustainable value.

- Charting Growth - The Evolutionary Journey of a GCC [**a multinational pharmaceutical and biotechnology firm case study**]
- Leveraging GCC for Engineering & Innovation [**one of world's largest medical technology, services and solutions company case study**]
- Improving patient's experience using AI and other innovative tech [**a German healthcare solutions provider case study**]
- Leveraging Analytics & AI for new market product launches [**a leading life sciences & pharma company case study**]
- Real-Time Supply Chain Planning Excellence [**a global pharmaceutical leader case study**]



Case study: Charting Growth - The Evolutionary Journey of a GCC

Background: Prior to 2014, the company (*a multinational pharmaceutical and biotechnology firm*) was dependent on external partners to deliver IT commitments, and there was an evolving need to uplift the quality of service to the business. Currently, the GCC in India employs over 3200 people - 2/3rd of headcount focus on technology capabilities.

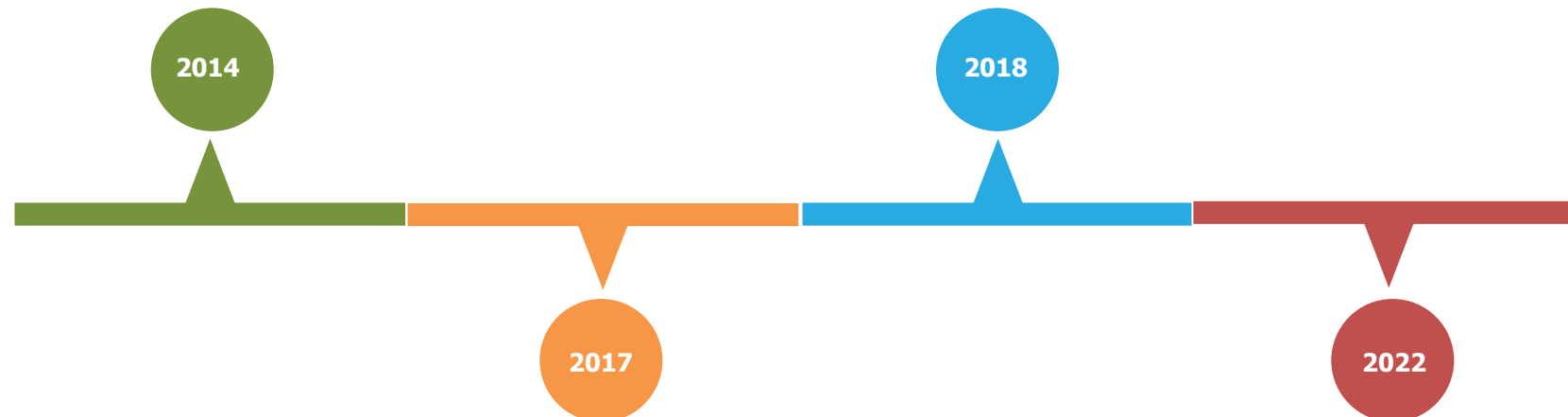
They went on an embarking journey to establish a GCC, that is now driving company's digital agenda, strengthening digital infrastructure and developing technological capabilities that aids in effective and faster delivery of medicines and enhancing patient experience.

Established Global Innovation & Technology Center (GITC) in 2014 in Chennai

Major source of technology innovation. Teams supports with digital transformation, visualization, data & analytics, automation, and AR/VR capabilities.

Established Global Medicine Development (GMD)- R&D division in Bengaluru in 2018

With over 300 employees contributing to the business, from clinical, patient safety, regulatory affairs, biometrics & clinical data and management.



Established Global Business Services (GBS) in 2017 in Chennai & Bangalore

The teams supports key corporate & business functions such as marketing, F&A, supply chain / procurement, etc.

Established Site Management and Monitoring (SM&M) function in Bengaluru in 2022

Engages in execution of clinical studies to generate high quality data eligible for submissions to regulatory agencies across the world.

Case study: Leveraging GCC for Engineering & Innovation

Background: The company is among the world's largest medical technology, services and solutions companies – alleviating pain, restoring health and extending life for millions of people around the world. The company wanted to expand its global R&D efforts and it established a state of the art, IT-enabled, captive engineering R&D center in India.

GCC Overview

India Inception:
2011

GCC Description: **Engineering & Innovation Centre**

Total Installed Talent:
3-4K

GCC Location(s):
Hyderabad, Bangalore

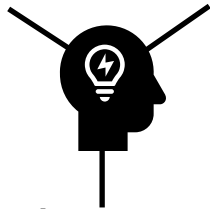
Business Challenge

Expansion of R&D efforts:

The company wanted to expand its R&D footprint in the Emerging markets whilst supporting global R&D efforts.

Access to Talent:

Lack of talent at the headquarter locations needed for the expansion of R&D efforts.



Global Collaboration:

The company wanted to establish R&D centers in multiple locations to foster global collaboration and take advantage of diverse perspectives, helping them lead to the development of innovative solutions that address a broader range of challenges.

Solution



Establishment of R&D center in India:

The center was established with the aim to conduct advanced engineering R&D and product development work for the global operating units in the areas of design, analysis, hardware, software development, and testing while developing capabilities for future product development.



Access to top-notch talent: Access to software and engineering talent in the India is helping company accelerate R&D Globalization and Innovation.

Outcome

- Transformation of center to Global R&D hub: Given the market size and availability of high-class talent pool, India R&D center has transformed into a global R&D hub.



The center contributed to **150+** Patents and **400+** IP disclosures globally

400+ highly qualified engineers work at the center



Case study: Improving patient's experience using AI and other innovative tech

Background: The company (a German healthcare solutions provider) contributes to the development of product and solutions in diagnostics and therapeutic imaging, laboratory diagnostics and molecular medicine, as well as digital health. The company wanted to expand its digital health capability and build innovative product to enhance patient's experience.

GCC Overview

India Inception:
2008

GCC Description:
Innovation Hub

Total Installed Talent:
4-5K

GCC Location(s):
Bangalore, Mumbai, Gurugram

Business Challenge

Need for tech:

The healthcare industry is rapidly evolving, with a growing demand for advanced technologies, including AI, machine learning, and data analytics.

Developing and implementing these technologies require significant investments in R&D.



Improve Patient Experience:

The company wanted to use innovative tech to improve its product and service portfolio to enhance patient experience.

Solution

The GCC in India serves as an innovation hub, focusing on cutting-edge technologies such as AI. Some of key product developed:



Development of 'AI Pathway Companion':

It integrates longitudinal patient data and co-relates insights from imaging, pathology, lab, and genetics into a unified Fast Healthcare Interoperability Resource based data model.



Development of 'AI-Rad Companion':

It uses AI to support the clinical decision-making process by automating the analysis and quantification of clinical imaging data.



Development of 'Patient Experience App':

It improves the Magnetic Resonance Imaging (MRI) patient experience with Augmented Reality (AR).

Outcome

- ❑ **Delivering Patient-Centric care:** The AI based solutions empowers company to deliver more patient-centric care.
- ❑ **Improvement in accuracy:** The AI-driven advancements in medical imaging contributed to improved diagnostic accuracy, reducing the likelihood of errors and enabling more precise treatment planning.



40+ products and solutions developed or enhanced that uses AI as their core technology.

Case study: Leveraging Analytics & AI for new market product launches

Background: A leading **life sciences & pharma company** operates a GCC in India to harness the country's talent pool & technological capabilities. Its GCC plays a pivotal role in supporting the company's product launches in new markets through advanced analytics and artificial intelligence.

GCC Overview

India Inception: **2006**

GCC Description: **Global Service Center**

Total Installed Talent: **10-12K**

GCC Location: **Hyderabad**

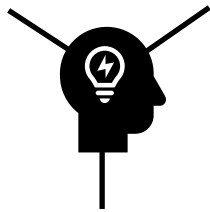
Business Challenge

Sales Forecasting Uncertainty:

Inaccurate sales forecasts often led to issues with overstock or understock situations.

Pricing Strategy Complexity:

Determining the right pricing strategy for new markets with varying economic conditions and competition was a complex task.



Competitive Analysis Lag:

Manual competitive analysis was time-consuming and sometimes lagged market changes.

Solution



Advanced Forecasting Models:

Implemented advanced forecasting models using AI to improve the accuracy of sales forecasts.



Dynamic Pricing Algorithms: AI-driven pricing algorithms were developed to assess market conditions, demand elasticity, and competitive pricing.



Market Segmentation: Utilizing AI, the team segmented the new markets more effectively. This allowed for tailored marketing and sales strategies, aligning product offerings with specific market needs.

Outcome

- ❑ **Sales Forecasting Accuracy:** Accurate sales forecasts reduced overstock and understock situations, leading to optimized inventory management
- ❑ **Dynamic Pricing Strategies:** The dynamic pricing algorithms enabled company to respond quickly to market changes, maintaining
- ❑ **Real-time Competitive Insights:** Allowed staying ahead of competitors, adapt strategies, and respond to market shifts effectively.

Marketing Analytics team drives the sales of their global oncology products portfolio **>\$4 Bn.**



Case study: Real-Time Supply Chain Planning Excellence

Background: A **global pharmaceutical leader**, faced a multifaceted challenge in optimizing its supply chain operations, prompting the initiative led by the GCC in India.

GCC Overview

India Inception: **2006**

GCC Description: **Global Service Center**

Total Installed Talent: **10-12K**

GCC Location: **Hyderabad**

Business Challenge

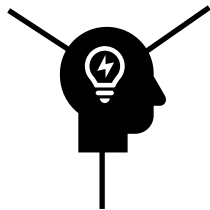
Limited Visibility:

The lack of real-time visibility into the supply chain posed challenges in identifying and addressing issues promptly.

Operational Inefficiency:

Inefficiencies in supply chain operations, leading to suboptimal resource utilization, excess inventory, and a lack of real-time visibility.

Cost Overruns: The existing supply chain processes were contributing to higher operational costs



Solution



Data Integration: The team seamlessly integrated diverse data sources, including production, inventory, and demand data, creating a robust foundation for analysis.




Predictive Modeling for Demand and Supply: The team implemented predictive modeling algorithms to analyze historical data and forecast future demand and supply fluctuations.



Real-Time Visibility: The dashboard provided real-time visibility into the entire supply chain, enabling them to monitor inventory levels and identify potential inefficiencies promptly.

Outcome

- ❑ **Operational Efficiency:** Significant improvement in operational efficiency by providing timely insights and actionable intelligence.
- ❑ **Reduced Operational Cost:** Achieved a notable reduction in operational costs, contributing to overall cost-effectiveness.

50% increase in operational efficiency 

40% decrease in operation costs. 

Report Overview

The report is based on secondary research, primary interviews, and brainstorming sessions undertaken by ANSR.

Secondary Research

The market research experts at ANSR conducted detailed secondary research for analysis. The team relied on the organization's database of information, leadership view, and public websites to gain better understanding into the insights.

Disclaimer

The information contained herein has been obtained from sources believed to be reliable. The material or information is not intended to be relied upon as the sole basis for any decision which may affect any business. Before making any decision or taking any action that might affect anybody's personal finances or business, they should consult a qualified professional adviser.

Use or reference of companies/third parties in the report is merely for the purpose of exemplifying the trends in the industry and that no bias is intended towards any company. This report does not purport to represent the views of the companies mentioned in the report. Reference herein to any specific commercial product, process or service by trade name, trademark, manufacturer, or otherwise, does not necessarily constitute or imply its endorsement, recommendation, or favoring by ANSR or any agency thereof or its contractors or subcontractors.

The material in this publication is copyrighted. No part of this report can be reproduced either on paper or electronic media without permission in writing from ANSR. Request for permission to reproduce any part of the report may be sent to ANSR.

Usage of Information

Forwarding/copy/using in publications without approval from ANSR will be considered as infringement of intellectual property rights.



About ANSR

ANSR is the market leader in enabling organizations to build, manage, and scale global teams through Global Capability Centers (GCCs). ANSR's suite of end-to-end AI-enabled products and offerings are trusted by the world's best companies to help them set up, manage, and run their high-impact technology centers.

120K

Professionals
Hired

120+

Global Centers
Established

2M+

sqft. of Workspace
under Management

18+

Years of
Experience

\$2B+

Capital Investment
Created