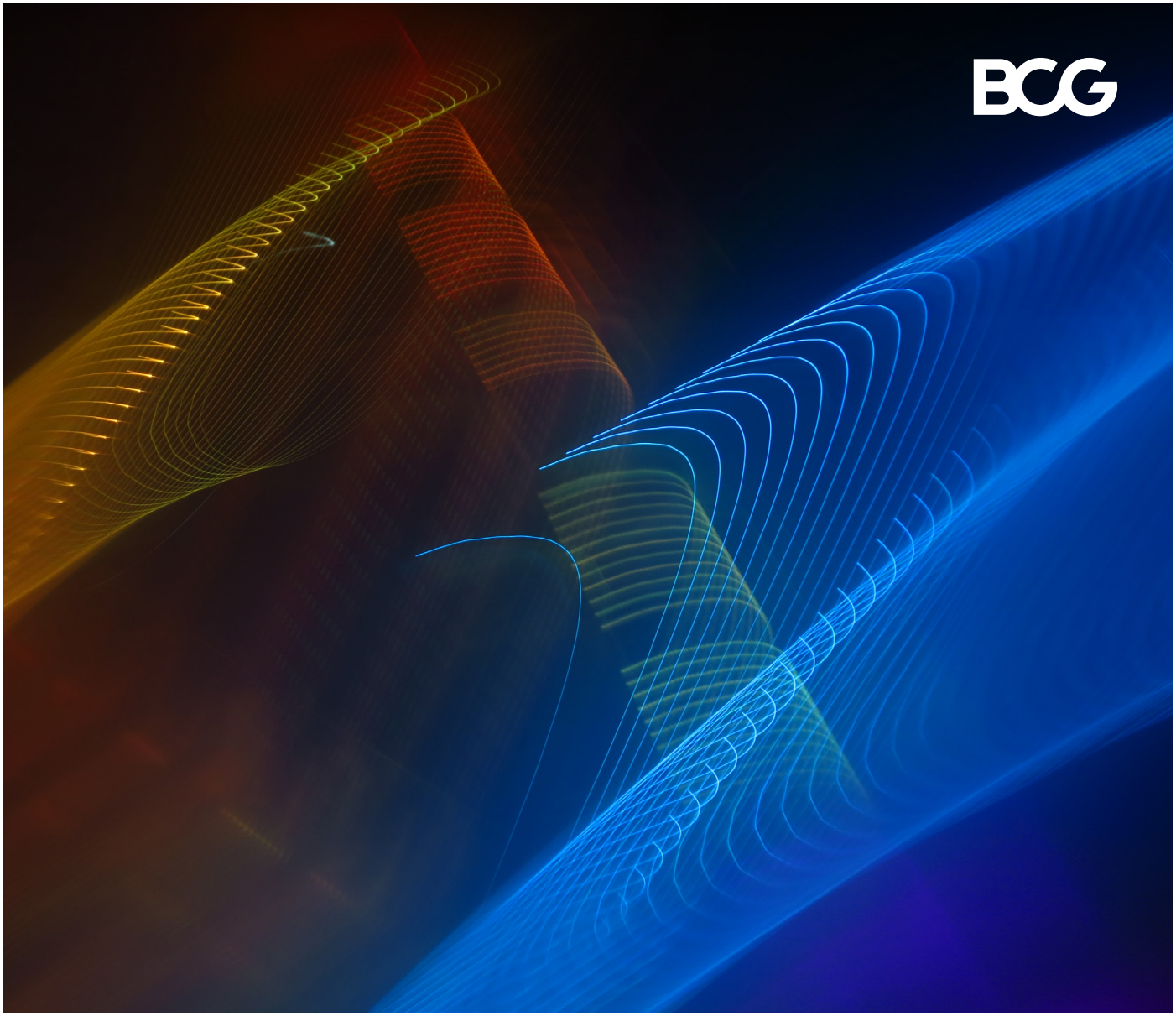


WHITE PAPER

Global Capability Centers' (Gen)AI agenda

A need to shift from incremental experimentation to entreprise-wide transformation

April 2025

Boston Consulting Group partners with leaders in business and society to tackle their most important challenges and capture their greatest opportunities. BCG was the pioneer in business strategy when it was founded in 1963. Today, we work closely with clients to embrace a transformational approach aimed at benefiting all stakeholders—empowering organizations to grow, build sustainable competitive advantage, and drive positive societal impact.

Our diverse, global teams bring deep industry and functional expertise and a range of perspectives that question the status quo and spark change. BCG delivers solutions through leading-edge management consulting, technology and design, and corporate and digital ventures. We work in a uniquely collaborative model across the firm and throughout all levels of the client organization, fueled by the goal of helping our clients thrive and enabling them to make the world a better place.

Contents

1 Executive Summary

Global Business Services (GBS) or Global Capability Centers (GCCs) are increasingly betting on GenAI to drive productivity gains. Over 70% of GCCs have initiated their (Gen)AI journey, focusing on pilot projects and early use cases. Yet, most remain far from realizing full potential due to fragmented approaches and weak foundational capabilities. It shouldn't be a surprise that reported savings today do not exceed more than 5-10% of these respective GCCs baselines and the aspired 20-30% productivity uplift is still far off.

Our survey demonstrates that success in (Gen)AI depends on GCCs maturity across five critical dimensions: **Strategy & Governance, Operating Model, Technology & Data, People & Talent, and Partner Ecosystem**. The correlation between higher maturity levels and tangible financial savings is significant and with an average maturity score of 46 (out of 100), a lot of work remains to be done.

To accelerate the transformation and achieve breakthrough results, GCCs must:

1. Build **actionable AI roadmaps** and a value framework with clear and measurable
2. **Strengthen infrastructure**, technology lifecycle management, and data governance.
3. Develop **scalable platform operating models** that drive e2e process transformation under leadership of **strong and fully mandated Enterprise Process Owners**.
4. Invest in talent, **upskill the workforce** and invest in culture change & adoption.
5. **Optimize partnerships** to access cutting-edge technologies and innovations.

In summary, capturing full potential requires bigger bets. Companies need to move beyond individual use cases and embed (Gen)AI in their end-to-end process transformation efforts.

This will require ramping up investments, addressing foundational gaps in the operating model and IT & data architecture and setting up the right structures to enable capability building and adoption at scale.

Partner with BCG to Transform

BCG provides end-to-end expertise to accelerate your GenAI transformation—from pilots to enterprise-wide adoption. Now is the time to act: redefine operations and unlock transformative value in an AI-powered future.

2 Context and Study Objectives

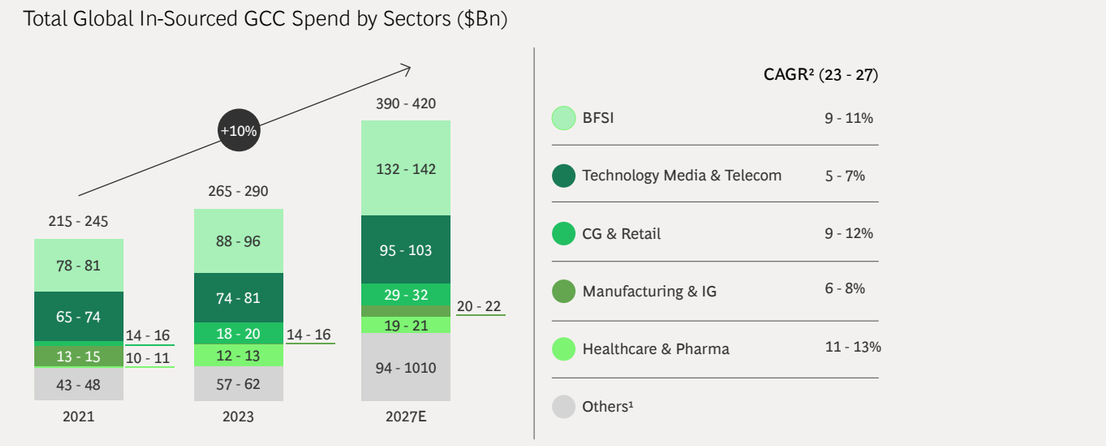
2.1 GCC, providers of fully digitized platform solutions

Today, over 70% of companies have embraced **Global Business Services** (**GBS**) or **Global Capability Centers** (**GCCs**). Strategically located in cost-efficient regions, GCCs serve as critical drivers of **innovation, efficiency, and scalability**. While traditionally focused on support functions such as IT, Finance, and HR, GCCs are now evolving into pivotal enablers of **core functions and digital transformation**.

The financial footprint of GCCs is significant. **Global GCC spending is estimated at $465–510 billion in 2023**, with an annual growth rate of 10%. This trajectory is expected to elevate spending to **$715 billion by 2027**, with the majority of investments being insourced (55%).

FIGURE 1

Growth of GCCs



The value case for well-functioning GCCs is crystal clear and companies that have invested in them outperform peers in terms of operating cost, resilience & agility and new tech capabilities.

The best-performing GCCs stand out by offering **fully integrated, highly efficient, user-centric service platforms** that enhance human performance by **cutting-edge technologies like (Gen)AI at scale**. With (Gen)AI, they should be able to unlock the next 20-30% of productivity improvements, while also realizing a significant shift of capacity from transactional & repetitive tasks to value adding insights generation and decision support.

FIGURE 2

(Gen)AI Opportunity areas for GCCs

There are 4 complementary and mutually enforcing areas of opportunity for GCCs that embrace GenAI:

Foundational

Apply GenAIto core processes &activities owned by GCC

- Fast opportunity with **moderate effort**
- Leverage **pre-configured solutions** to specific process steps for ex. –
  - Screening applications
  - First-level communication
  - Drafting job description

Build GenAIcapabilities across processes & activities

- Set up **centers of expertise** to bundle new development and delivery resources to quickly identify and implement used cases along process chains
- **Operate and maintain** use cases on a continuous basis

New scope of work

Offer GenAIcapability as a serviceto rest of the org

- Act as **service line**
- Support business with
  - Advisory and opportunity identification
  - Solution development
  - Ongoing maintenance and operations of solutions
- **Support functions sitting in business units or** in country organizations on topic

Offer risk mgmt. and certification services for all enterprise GenAI apps

- Solutions developed by third parties or other enterprise units
- Service to assess solutions from a risk, legal compliance, data protection and cyber security point of view

2.2 Are GCCs positioned to unlock the full potential of GenAI?

In what follows, we adress a pivotal question:

Are Global Capability Centers (GCCs) truly prepared to maximize the transformative potential of Generative AI (GenAI)?

We explore whether GCCs are making sufficient investments in GenAI, whether those investments are generating tangible value, and how they can extract even greater returns.

3 Survey approach and respondents

3.1 Surveying 150 companies to understand investments & operating model choices

We surveyed **150 companies** with established GCC operations. The survey captured insights from GCC leaders across four primary categories:

1. **Respondent profile**: Who participated in the survey, the organizations they represent, and the role of their GCCs?
2. **Status quo**: Where respondents currently stand in unlocking value from GenAI?
3. **Use cases**: The number and nature of GenAI use cases that GCCs are developing, piloting, and deploying?
4. **AI maturity**: Whether organizations have the foundational setup and critical enablers necessary to harness GenAI effectively?

Our BCG (Gen)AI maturity framework served as a basis to highlight gaps across five key dimensions:

FIGURE 3

(Gen)AI Maturity Framework

(Gen)AI Maturity Framework Dimensions

Strategy & Governance

- Overarching Strategy
- Leadership Buy-in
- Roadmap & future enhancements
- Prioritization & Planning
- Success metrics and KPIs
- Ethical AI policies and compliance with regulations

Operating Model

- Impact analysis & roles
- Organization model (platform org)
- Organization model (CoE)
- Dedicated GenAI leader
- Empowered & mandated global process owner

Technology & Data

- Infrastructure and workforce readiness
- Cloud architecture
- Development, testing and lifecycle mgtm.
- Unified GenAI platform
- Data ownership
- Security policy for (Gen)AI

People

- Workforce and Capability planning
- Talent Location Strategy
- Training and Professional Development
- % of delivery workforce trained in (Gen)AI
- Change mgtm. & cultural shift

Partner Ecosystem

- Readiness external partners (existing)
- Partner selection & integration (new & existing)
- Reassessment of partners (existing)
- Innovation & Co-creation
- Data Sharing, IP protection & Security

For each subdimension respondents were asked to rate their organization's maturity by choosing the most accurate statement between 4 options. These options were assigned a maturity score between 0 and 100.

Scores are weighted equally between each subcategory and then aggregated.

3.2 Respondents profile & key characteristics

A wide range of medium and large global companies across

The study includes **global companies across various industries, showcasing broad sectoral representation and a mixed company size** profile with +45% larger companies with over 25,000 employees:

FIGURE 4
Distribution across industry segments

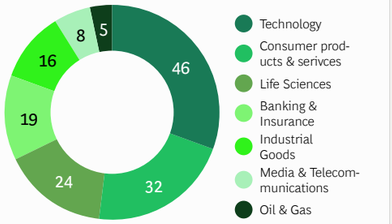


FIGURE 5
Maturity of hubs

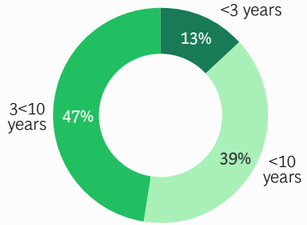
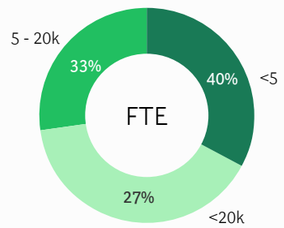


FIGURE 6
Size of hubs



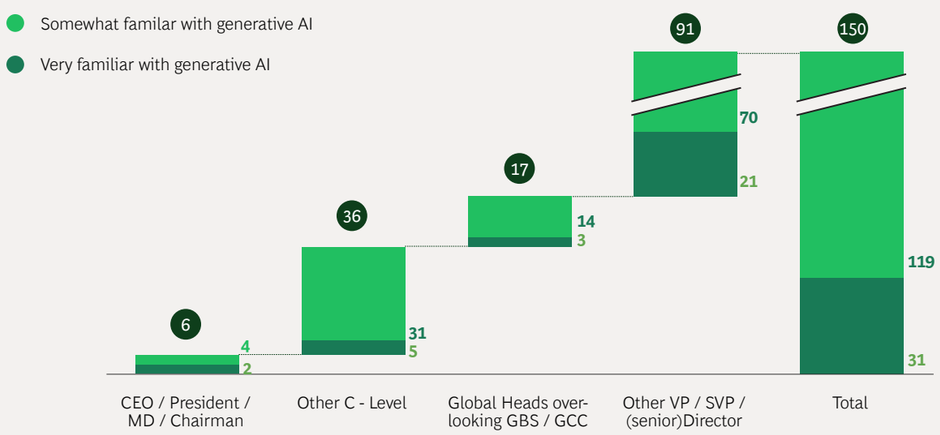
Companies represent **both well-established & new hubs**, indicating a good degree of diversity in terms of maturity level, geographical footprint and functional coverage.

Senior GCC leaders with deep (Gen)AI expertise

A significant majority of participants holds senior **leadership positions**, with **89% of respondents either being C-level or directly reporting to one**. These leaders also claim to be familiar with (Gen)AI and its applications within GCCs.

While there may be some degree of overestimation in respondents' self-assessed expertise, their **combination of seniority and strategic awareness** provides a well-rounded perspective on (Gen)AI.

FIGURE 7
Participant Seniority by GenAI Knowledge



4 (Gen)AI pipeline and Value cases

4.1 Early (Gen)AI Pipeline drives first cautious benefits

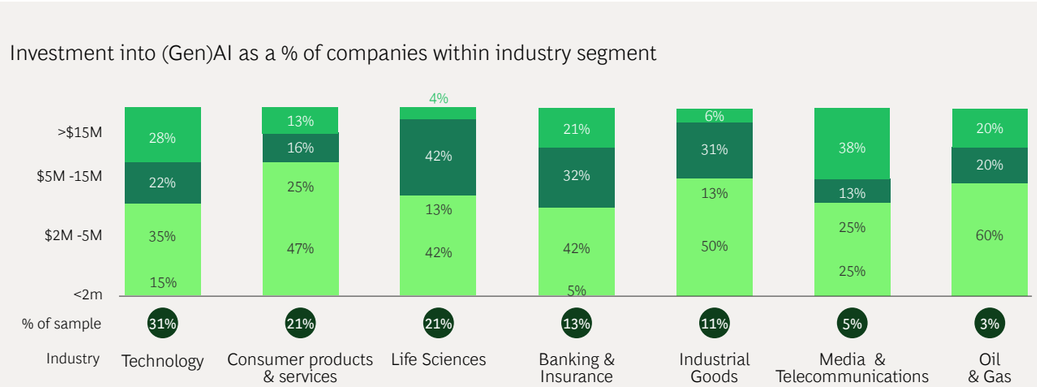
Companies started to invest, Technology and Banking & Insurance are leading the pack.

Survey results indicate that over 70% of companies have started to invest in (Gen)AI initiatives last year. However, only a minority of organizations are committing to larger-scale investments, with just below 20% allocating more than $15M in the same period.

Industries such as **Technology, Banking, and Insurance** are at the forefront of GenAI investments. Notably **28% of companies in Technology** and **21% in Banking & Insurance** allocated over **$15 million** to GenAI initiatives last year. These industries increasingly recognize the transformative potential of GenAI in automating processes, improving operational efficiency, and fostering innovation.

By contrast, **Life Sciences and Industrial Goods** sectors have taken a more measured approach. Significantly fewer players in these industries started to invest: only **58% of Life Sciences companies** and **50% of Industrial Goods firms** reported at least **$2 million of investments**, compared to the cross-industry average of 70%.

FIGURE 8
Investment in (Gen)AI by Industry



Investments aren't paying back, at least not at scale

Despite increasing financial commitments, most companies' **use case pipeline remains underdeveloped**, with most initiatives still confined to the identification or pilot stages.

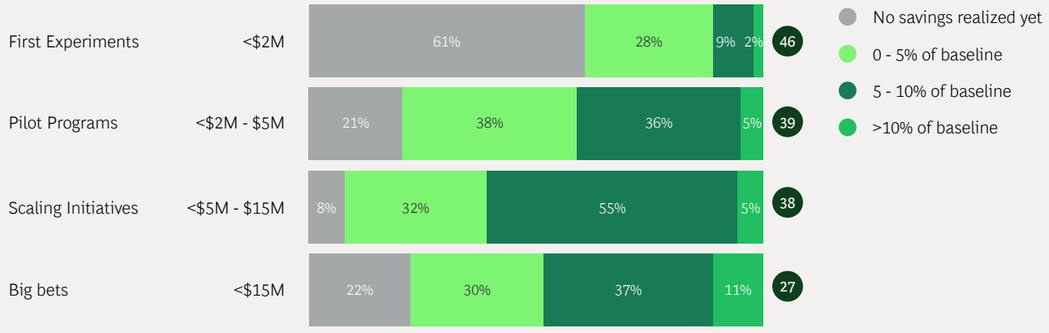
Survey data reveals that although **75% of GCCs** have identified at least **five use cases per function** (Finance, IT, HR, Supply Chain, and Procurement), less than **5% have succeeded in deploying any of these use cases at scale**. This disparity between identification and full implementation is not completely unexpected given the emerging character of the technology, but it nonetheless highlights the significant challenges organizations face in operationalizing AI initiatives across business functions.

Despite their conservative investment strategies and slow pipeline conversation rates, 70% of companies have already reported operational savings from (Gen)AI initiatives. >40% of respondents reported savings exceeding 5-10% % of their GCC baseline.

Companies that made larger investments, particularly those exceeding $15 million, are unsurprisingly reaping greater financial results.

FIGURE 9

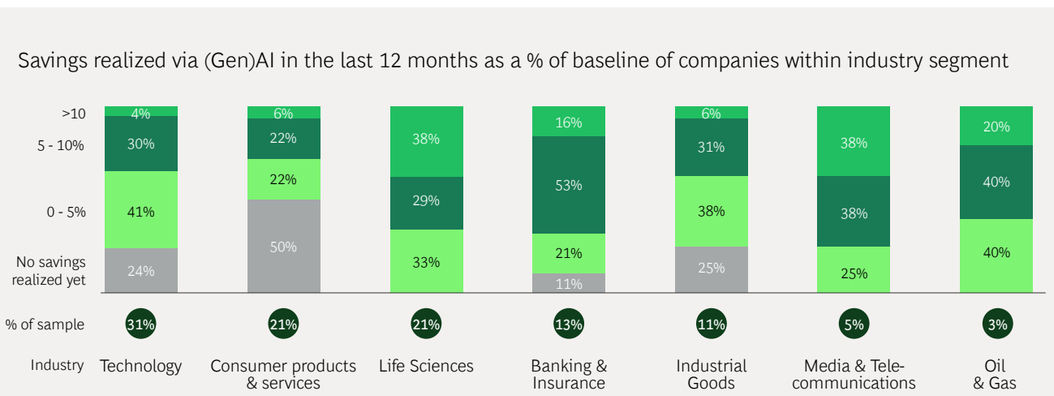
Savings Realized by Investment Level



For example, 16% of companies in Banking and Insurance report savings exceeding 10% of their GCC baseline.

FIGURE 10

Savings Realized by Industry

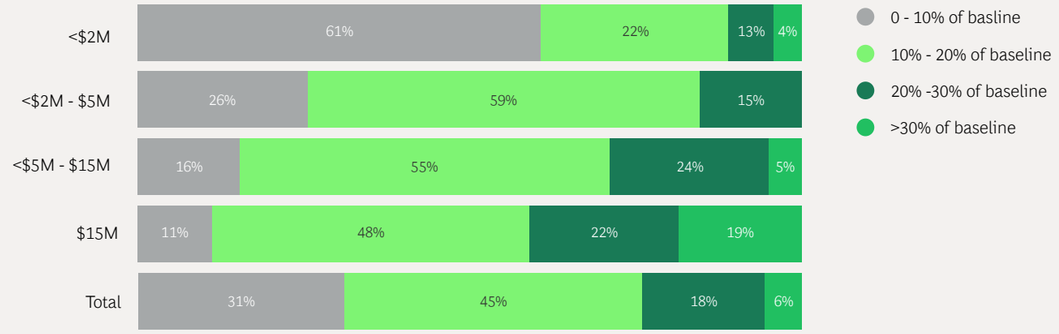


GCCs remain optimistic about the future

While current savings remain below expectations, GCCs remain optimistic about the future and anticipate **operating expense (OPEX) reductions of 10–30% over the next three years** as they scale up their AI initiatives.

FIGURE 11

Expected OPEX Savings Over Next Three Years by Company Size



4.2 Selecting the right use cases to maximize ROI

In what follows, we examine the types of use cases targeted by Global Capability Centers (GCCs). A **dual focus** emerges:

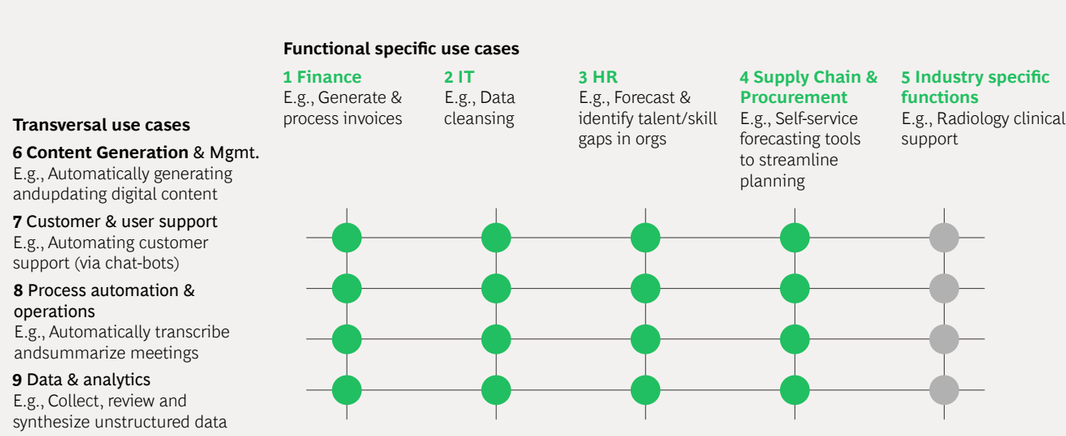
1 **Function-specific use cases** addressing department-specific challenges in the areas of Finance, HR, IT, Supply Chain & Procurement.

2 **Cross-functional (Gen)AI platform capabilities** designed to enhance efficiency across processes for a set of common capabilities.

This dual focus enables GCCs to maximize the impact of (Gen)AI by addressing both overarching and specialized operational needs. In addition, transversal (Gen)AI capabilities help reinforce the impact of function specific tools and vice versa.

FIGURE 12

Transversal and Functional Use Cases



Cross-functional (Gen)AI capabilities complement and reinforce the impact of function-specific initiatives. These platforms—focused on e.g., process automation, data analytics, and decision-making support—empower GCCs to unlock value by augmenting human labor through agent augmentation. Employees can tap into large datasets and access actionable insights at their fingertips, improving workflows and decision-making across the organization.

Meanwhile, **functional use cases** are designed to address the unique challenges within individual departments. In Finance, AI automates core tasks like invoice processing and reconciliation, while in IT, it supports data cleaning and infrastructure management.

FIGURE 13

Function-specific (Gen)AI use cases as top priorities for GCCs

Finance

The most frequently deployed use case in Finance is **invoice processing**, cited by around **50% of respondents**. AI tools are automating invoicing and other financial operations, reducing manual work and improving accuracy. Additional high-impact use cases include:

Fraud Detection: Enhancing financial security by identifying irregular transactions.

Financial Close Automation: Streamlining end-of-period accounting processes for greater efficiency.

IT

In IT, data cleaning, mapping, and transformation are the leading (Gen)AI applications. These use cases ensure data integrity and provide a strong foundation for advanced analytics. Other notable applications include:

System Diagnostics: Using AI to identify and resolve system issues.

Code Generation: Accelerating software development processes and enhancing productivity.

HR

In Human Resources, **workforce planning** and **talent acquisition** top the list of AI applications:

AI tools predict hiring needs and optimize recruitment workflows.

Performance Analysis: While still emerging, AI is being applied to evaluate employee performance and improve organizational insights.

Supply Chain & Procurement

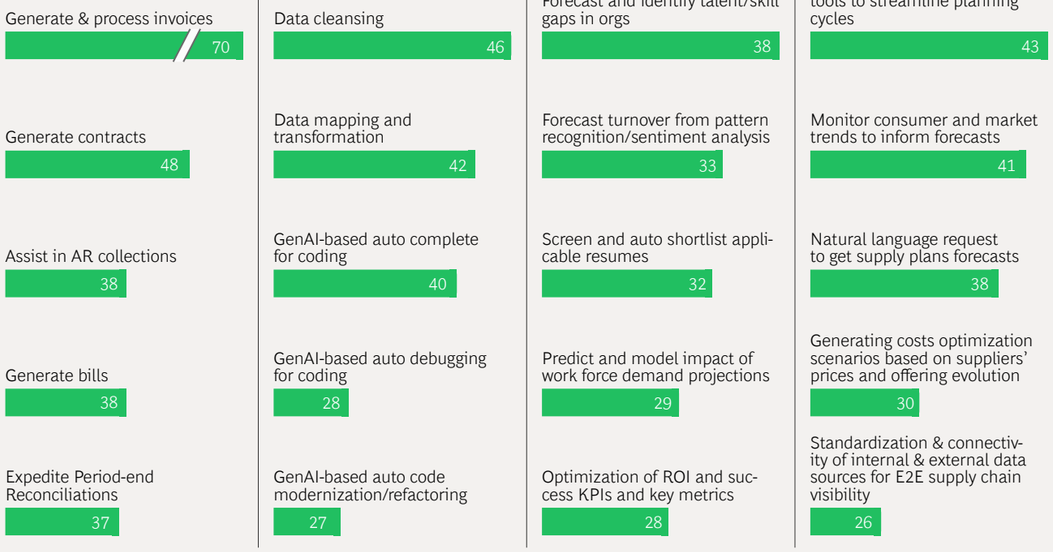
Demand Planning stands out as a key use case in Supply Chain & Procurement. AI optimizes supply chain management by predicting procurement needs and streamlining operations. Other impactful use cases include:

Supplier Contract Management: Enhancing supplier relationships and contract efficiency.

Predictive Maintenance: Reducing operational risks and ensuring system reliability.

Highlighted examples

Top 5 use cases



% Of respondents reporting use case as top-3 use case within their GCC

The Divide Between 'Old School' and Emerging (Gen)AI Applications

Our analysis reveals a tendency to lean on **'old school' applications**, focused on task automation and/or data-driven tasks. (Gen)AI applications can be grouped into four distinct categories:

1. **Automation use cases (31%)**
   The dominant 'traditional' application, focusing on automating routine, repetitive tasks. Automation use cases are popular but deliver only incremental value on top of existing RPA and Machine Learning technologies.

2. **Data-driven use cases (28%)**
   Use cases focused on analyzing and providing insights on large complex data sets. Frequently used in financial planning and decision-making, and well-established across GCCs.

3. **Knowledge synthesis use cases (23%)**
   Leveraging (Gen)AI to rapidly analyze and summarize vast, unstructured data sets. This slightly underutilized category holds significant potential to **transform both operational tasks as well as strategic decision-making** based on qualitative data.

4. **Content creation & knowledge management (18%)**
   Using the technology to generate rich, multimodal content and managing complex knowledge repositories. Currently underleveraged, this capability has the power to drive innovation for organizations ready to invest in it.

Interestingly, companies that have saved more with (Gen)AI have leaned more heavily into the emerging categories of 'knowledge synthesis' and 'content generation' use cases (34% share of use cases for companies saving >10% on their baseline vs. 28% for companies saving <5%). Thinking more creatively about GenAI applications seems to help unlock additional value.

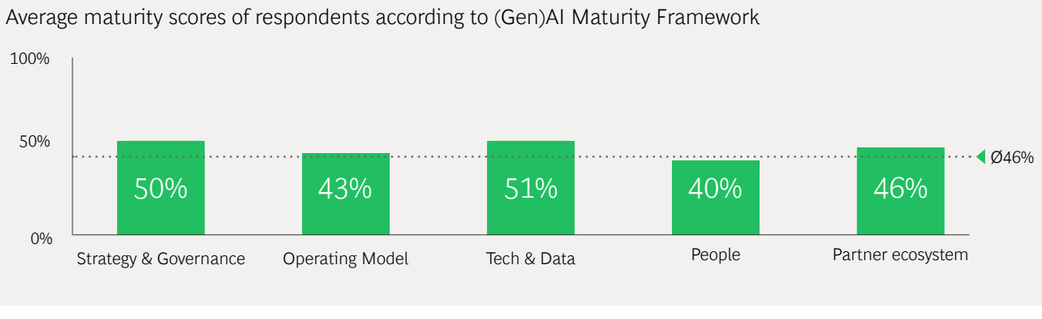
5 Gen(AI) Operating Model Maturity Assessment

GCCs have only begun to harness the transformative potential of (Gen)AI. Despite increasing interest, significant untapped opportunities remain. The question is: **What's holding GCCs back, and how can they accelerate transformation?**

To address this, we analyzed GCCs approach across five key dimensions of (Gen)AI maturity: Strategy & Governance, Operating Model, Technology & Data, People & Talent and the Partner Ecosystem. Overall, GCCs maturity across these dimensions is low and with an **average maturity score of 46/100** GCCs lag significantly behind their BPO & Technology Services peers who scored **62/100 when we surveyed them in spring 2024**.

FIGURE 14

Average (Gen)AI maturity



Larger companies demonstrate **higher overall (Gen)AI maturity** and again, Banking & Insurance companies are leading the pack from an industry point of view.

5.1 The link between maturity, savings and pipeline conversion

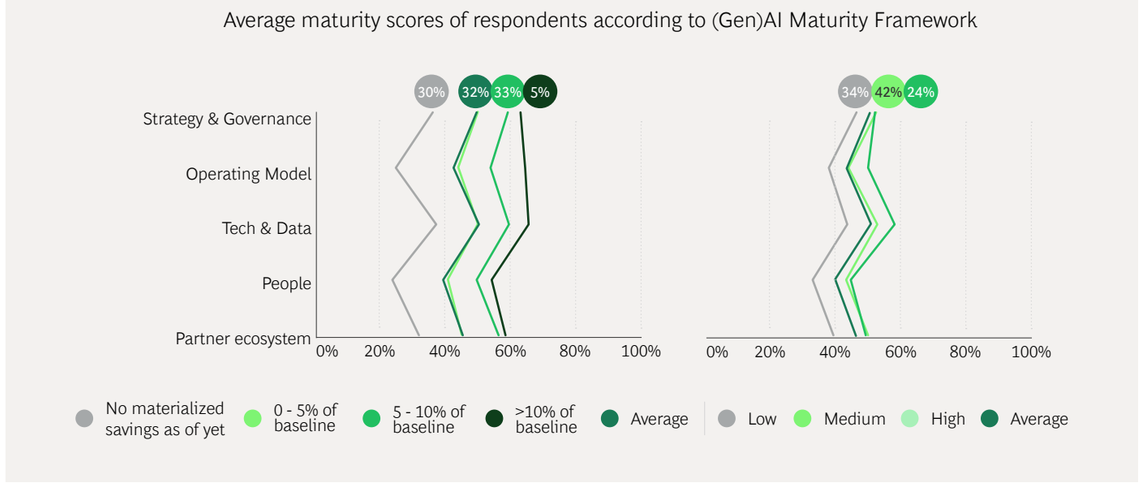
A clear correlation exists between (Gen)AI maturity and tangible outcomes, and this in terms of:

Savings realized: Most successful GCCs that achieve savings of >10% of their baseline, demonstrate significantly higher maturity scores (15 points above average and 30 points above the lowest performing players in their field).

Pipeline conversion: GCCs that demonstrate higher conversion rates, demonstrate higher maturity scores as well (5-10 points above the average).

FIGURE 15

(Gen)AI maturity per savings achieved – (Gen)AI maturity per pipeline conversion rate



The key dimensions to get-right:

1. **Roadmap and Future Enhancements:** Best performers can demonstrate a clear, long-term roadmap to guide strategic decision-making and ensure alignment with broader business objectives
2. **Success Metrics:** Strategic objectives are translated into a comprehensive set of success metrics, critical to monitor impact and adjust and reprioritize accordingly
3. **Empowered Global Process Owners:** Global Process Owners with clear mandates and capabilities drive the transformation across functional silo's and along e2e processes, and ensure focus in prioritization and resource allocation leading to faster scaling of initiatives
4. **Role clarity & ownership:** Every AI initiative has accountable owners and clear expectations, leading to better alignment and execution. Initiative teams are supported by an AI Center of Excellence that provides best-in-class expertise.
5. **Capability development:** GCCs workforce (Gen)AI literacy is well understood, and gaps are tackled effectively. Foundational skills are built across the entire workforce while deep expertise and capabilities are developed centrally in a (Gen)AI Center of Excellence for maximum impact.
6. **Change Management and Cultural Shift:** Most successful GCCs foster a culture that embraces AI-driven change and innovation to overcome resistance and ensure broad adoption of AI initiatives across the organization
7. **Data Ownership:** Robust data governance, with clear accountability, is key to accelerate the data journey underpinning most (Gen)AI use cases
8. **Development, Testing, and Lifecycle Management:** Comprehensive but lean and agile processes for developing, testing, and continuously improving AI models are deployed at scale.
9. **Partner ecosystem:** External partnerships are updated to ensuree alignment with AI goals. New partners are selected based on their proven innovative power and impact on (Gen)AI.

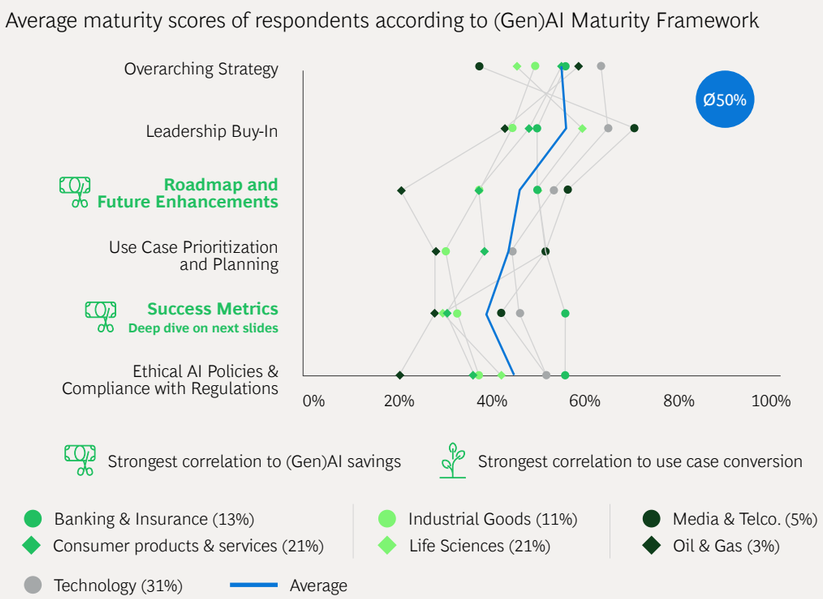
5.2 Deep dive: Strategy & Governance

Translate an ambitious strategy into roadmap & metrics to unlock value

While an aligned strategy and leadership buy-in are essential for any successful transformation, strategic plans risk becoming empty formalities unless they are translated into **actionable objectives, clear priorities, and detailed plans**. These strategies must be monitored using **simple yet effective KPIs**, ensuring tangible progress and alignment with organizational goals. Let it be that this is exactly where GCCs are lagging.

FIGURE 16

Strategy & Governance Maturity



Although GCCs could boost their ambition level on GenAI, most have or are in the process of laying out and aligning strategic plans. When it comes to detailing these plans into a consistent and integrated roadmap and actionable and measurable KPIs, a lot more work remains to be done and less mature players can learn from more advanced leading practices in e.g., Technology and Media & Telco.

5.3 Deep dive: Operating Model

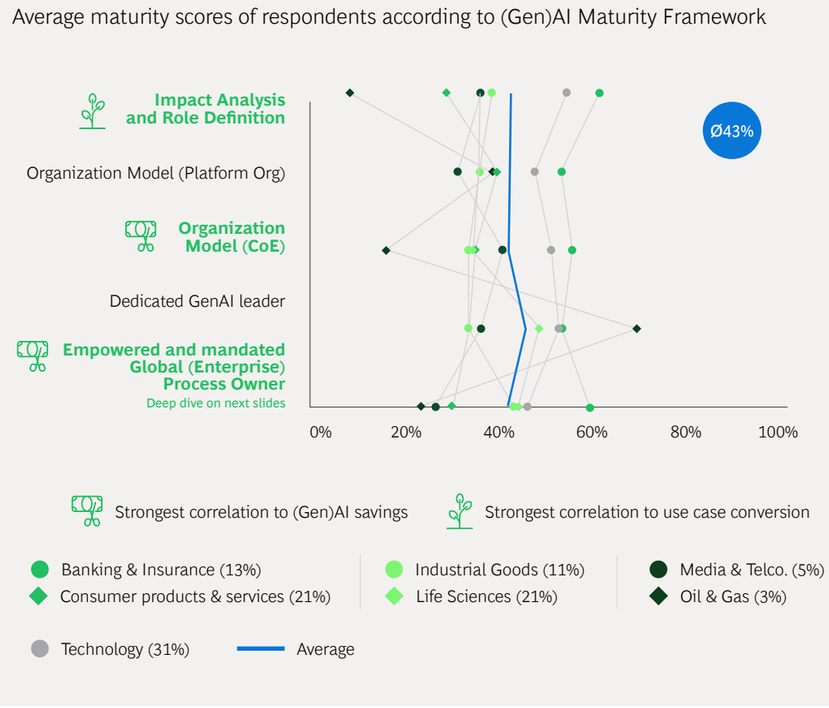
Appointing Enterprise Process Owners with Transformational Capabilities

With an average maturity score of **43**, the **Operating Model dimension** is the second-lowest dimension across all categories. Despite this, our analysis indicates that it is one of the most critical levers for unlocking **transformational impact from (Gen)AI**.

The concept of **Enterprise Process Owners (EPOs)** is widely recognized, yet many GCCs face challenges in implementing it effectively. Two primary obstacles hinder progress:

FIGURE 17

Operating Model Maturity



1. **Legacy Functional Silos**: Many organizations struggle to dismantle deeply entrenched functional silos and assign EPOs with a true end-to-end scope and mandate. Without strong **leadership buy-in**, EPO roles often either **become redundant** (functions, shared services, and IT appoint their own EPOs, leading to continuous misalignment and efforts to reconcile conflicting interests) or have **fragmented responsibilities** for only a subset of the original end-to-end process, limiting the transformational potential.

2. **Insufficient Seniority and Mandate**: EPOs often lack the **seniority, authority, and capabilities** required to lead transformation. Instead, they are relegated to the role of **super SMEs**, lacking the strategic mandate or the ciritical resources (e.g., process excellence and (Gen)AI capabilities) to act as true transformation leaders.

Our correlation analysis reveals that mandating strong **Enterprise Process Owners (EPOs)** to lead the **end-to-end transformation of processes**, is the **single most critical success factor** within the Operating Model dimension. This proves to be **more impactful** than having a dedicated GCC GenAI leader when it comes to accelerating the journey and maximizing ROI. Unfortunately, less than half of this survey's respondents have taken that route.

Building platform organizations, integrating process data & technology capabilities

Best-in-class EPOs integrate process, data and technology capabilities on robust but flexible solution platforms (focused on interconnected business applications). These platforms operate business solutions as **reusable, scalable, and modular capabilities**, continuously enhanced to meet evolving business needs. The holistic change in ways of organizing and working, includes the adoption of agile methodologies and cross-functional teams.

By embracing these **platform organizations**, GCCs can achieve the level of integration required to accelerate innovation, pipeline development and conversation and eventually maximize the return on investments in new technologies.

5.4 Deep dive: Technology & Data

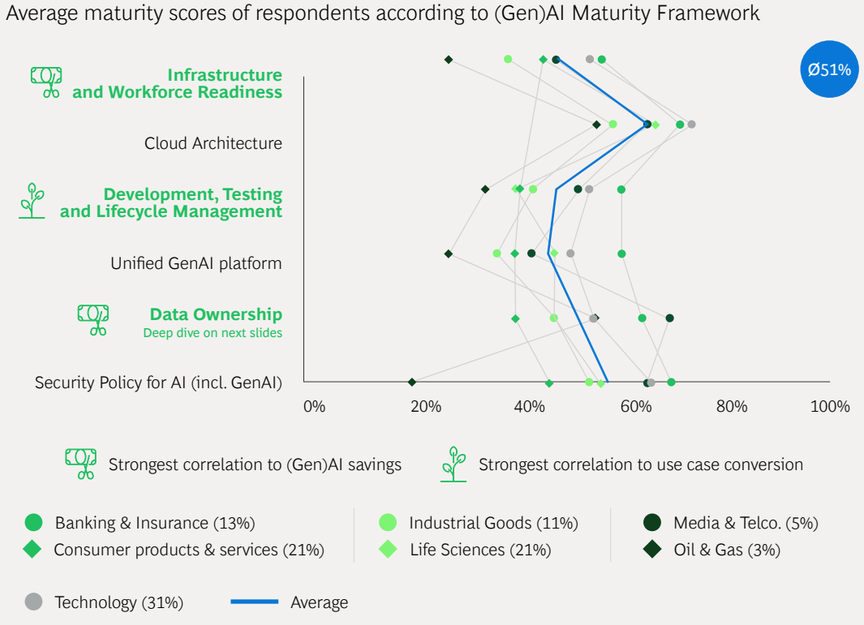
The #1 enabler for scaling (Gen)AI

The Technology & Data dimension is a critical enabler for advancing (Gen)AI use cases from **ideation to full-scale deployment**. GCCs that can build on robust **data and technology foundations**, including fit-for-purpose Cloud Architecture, are far better positioned to maximize savings and enhance the ROI of their (Gen)AI transformation.

While **Cloud infrastructure** has received significant focus so far—achieving an average maturity score of over 60 with spikes across all industries—**legacy infrastructure** on both the technology and data side remains largely neglected. **Banking & Insurance** stands as a notable exception, yet most industries fail to reach foundational maturity levels on this dimension.

FIGURE 18

Technology & Data maturity



In addition to building strong technology foundations, GCCs must implement **comprehensive AI development and testing processes**. These processes ensure that AI initiatives move through the development pipeline **rapidly**, while maintaining the highest standards of **quality** and **security**.

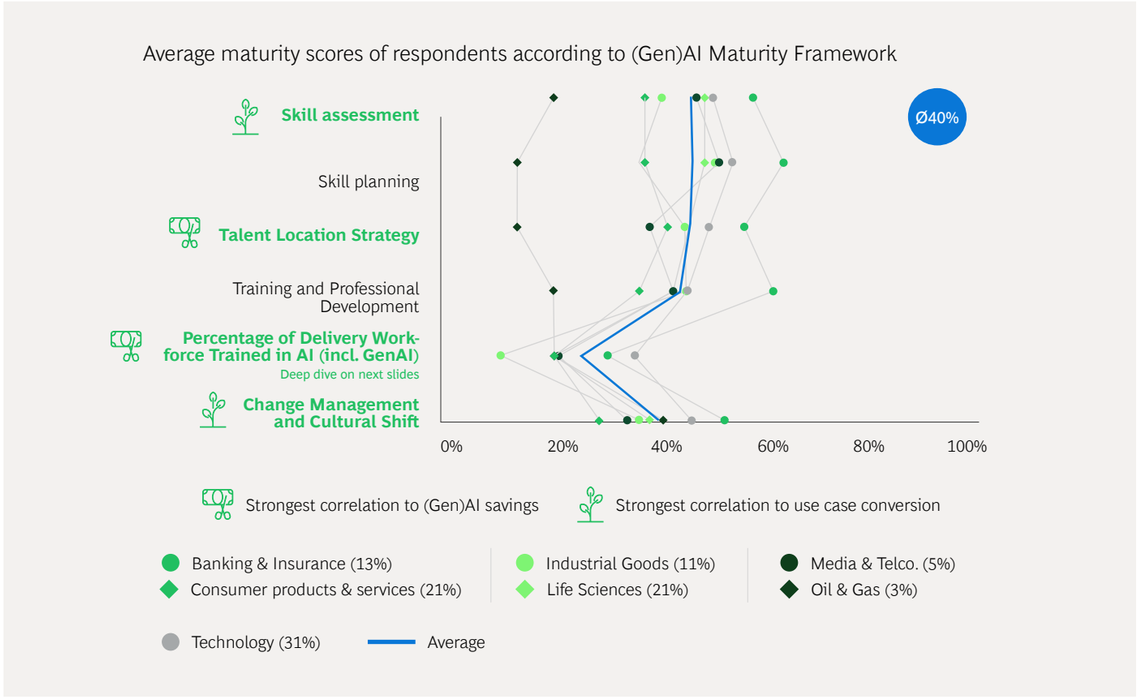
5.5 Deep dive: People

Are GCCs forgetting to take their people "along for the ride"?

With an average maturity score of just 40, the People & Talent dimension stands out as both the most critical and most underdeveloped area for achieving (Gen)AI success. Regardless of how advanced the technology is, scaling AI effectively depends on the right skills and culture. Without this foundation, AI adoption will remain below par and return on investments will lag.

FIGURE 19

Maturity of People



GCCs seem to completely miss the bar in two fundamental areas:

- **Upskilling**: fewer than 25% of employes have received proper AI training
- **Change management & culture**: insufficient efforts to embed a culture of innovation and maximize adoption across the organization

And while Banking & Insurance and (to a lesser extent) Technology are again leading the pack, all players report important gaps in exactly these two areas.

To accelerate their AI journey, GCCs must prioritize:

1. **Skill Assessment:** Identifying workforce capability gaps to strategically allocate resources
2. **Strategic Talent Placement:** Ensuring key roles are filled with AI-ready talent
3. **AI-upskilling:** Providing foundational (Gen)AI re/upskilling programs tailored to the specific needs of every population
4. **Change Management:** Fostering cultural readiness to embrace AI-driven transformation

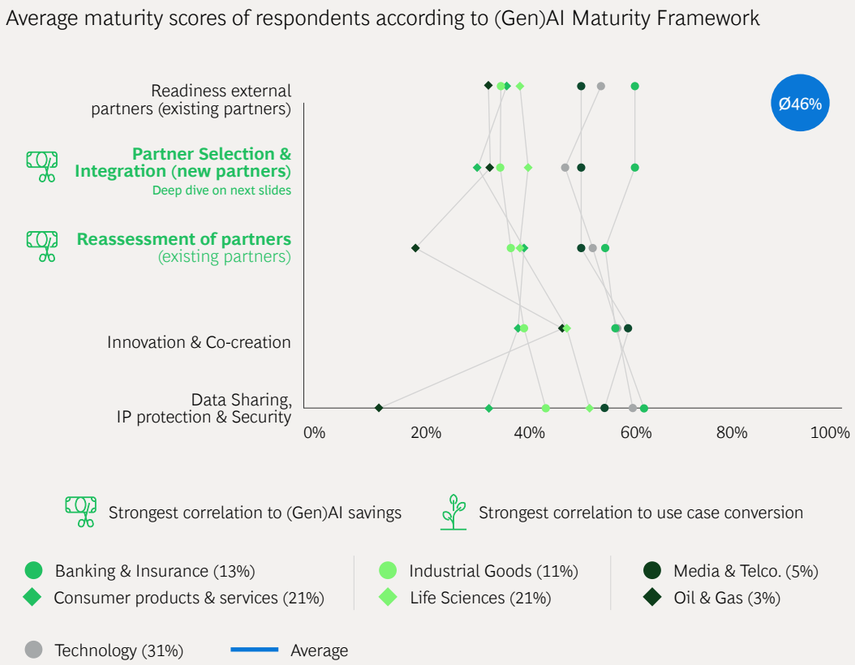
5.6 Deep dive: Partner ecosystem

Strengthening the Partner Ecosystem to unlock savings and accelerate transformation

One final lever for GCCs to advance their **(Gen)AI transformation** is their e**cosystem of strategic vendors**. Technology providers, implementation partners, and business process outsourcing firms are rapidly developing (Gen)AI capabilities. When managed effectively, these partnerships can provide a unique combination of **deep expertise** and understanding of GCC-specific **contexts, processes, and ways of working**.

FIGURE 20

Partner ecosystem maturity



Unfortunately, many c**urrent partnerships do not incentivize constructive and outcomes-focused ways of working**. Legacy BPO contracts are often structured around rigid SLAs (Service Level Agreements) and cost-per-transaction metrics, which prioritize efficiency and cost savings over innovation. This model discourages providers from investing in new technologies like (Gen)AI, as the short-term costs of implementation outweigh immediate contractual benefits.

Without provisions for shared rewards or innovation incentives, vendors have little motivation to explore or integrate cutting-edge solutions that could drive long-term value for the business.(incl. contract set-up, KPIs and incentives and governance) do not always incentive constructive and outcomes focused ways of working.

For GCCs to stay ahead, assessing and evolving their partner ecosystems must become a top priority. Four opportunities emerge:

1. **Source Strategic Capabilities**
   Address skill gaps and leverage cutting-edge partner capabilities particularly in (Gen)AI and data.
2. **Drive Innovation**
   Incentivize vendors to drive outcomes-based transformation across end-to-end processes
3. **Deliver Cutting-Edge Solutions**
   Leverage vendors best-in-class technology and tools.
4. **Enhance Collaboration**
   Establish governance mechanisms that incentivize continuous improvement in productivity and quality, rather than merely reducing labor costs.

Despite the opportunities, partnerships are often underutilized. 70% of GCCs outside of the Technology, Banking, and Media & Telco sectors have **not reviewed their partner ecosystems** for AI potential. A staggering **91% of companies** have not **reassessed their contracts**, missing opportunities to align with **(Gen)AI goals** and drive productivity gains.

6 Conclusions and recommendations

Unlocking the full potential of Generative AI: a strategic imperative for GCCs

Global Capability Centers (GCCs) are **at a pivotal juncture** in their (Gen)AI journey. While many have taken initial steps, the full transformative potential of GenAI remains largely unrealized. Fragmented efforts, underdeveloped foundational enablers, and cautious investment strategies continue to restrict the pace and scale of AI-driven transformation. To unlock substantial and sustained value, GCCs must shift from incremental experimentation to bold, enterprise-wide transformation.

Capturing full potential requires bigger bets. (Gen)AI has the potential to deliver a 20-30% increase in services provided by GCCs, 30% productivity improvements, and a 30-40% reduction in workforce engaged in repetitive, transactional tasks. But these benefits can only be achieved if companies move beyond small, opportunistic projects and take bold, enterprise-wide steps to scale AI initiatives.

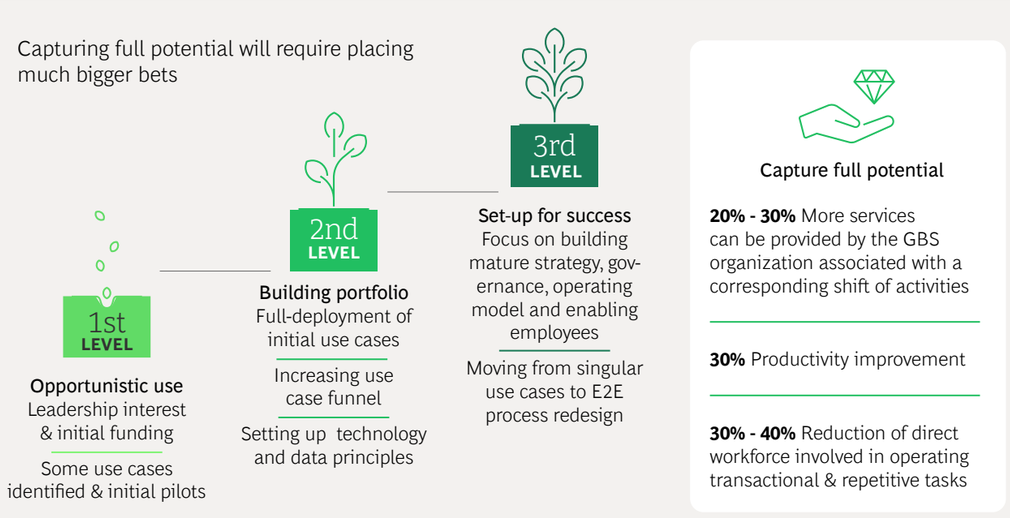
From Pilots to Transformational Adoption

Most GCCs are today in one of the first two stages of their (Gen)AI journey, where they focus on deploying initial use cases and building foundational technology and data infrastructure. To **set up for long-term success and achieve full potential**, companies must move towards the **third level**, which involves:

- Shifting focus from **individual use cases** to redesigning **entire end-to-end processes**
- Building **mature governance** and operating models to scale AI initiatives enterprise-wide
- Building **(Gen)AI literacy and capabilities** at scale (incl. installing the right culture that drives innovation & adoption)

FIGURE 21

Levels of (Gen)AI adoption



Buckle up for large-scale (Gen)AI Transformation

If your organization wants to lead in the AI-driven future, **now is the time to act**. Here's where to begin:

1. **Ramp Up Investments**: Align your (Gen)AI investments with your **strategic goals and transformation plans**. Stop taking small, incremental steps—**invest at scale** to drive real impact
2. **Set Up the Right Structures**: Develop the **operational frameworks** needed to move AI use cases from concept to reality: a fit for purpose **Operating Model** integrated along end-to-end processes and with strong **Enterprise Process Owners** in the driver seat
3. **Bundle expertise in a Center of Excellence (CoE) and identify gaps**. Engage partners to close gaps and accelerate the transformation.
4. Tackle **legacy infrastructure** and build a **robust data framework** with clear governance and access responsibilities to enable scalable AI solutions. Implement solid but agile processes for AI **development, testing, and deployment lifecycles**.
5. Drive **cultural change** to embed AI innovation into the organization's DNA.

Ready for Transformation? Let's Get Started

At BCG, we understand the complexities of scaling (Gen)AI initiatives. With proven frameworks and deep expertise, we help organizations accelerate their transformation—delivering measurable value and lasting competitive advantage. The companies that act **quickly and decisively today** will emerge as tomorrow's leaders.

7 How BCG can support you

No matter where your organization is on its (Gen)AI journey—whether you're **just starting out**, looking to **scale initial use cases**, or aiming for a **full-scale transformation**—BCG is here to help you take the next step. With deep expertise in (Gen)AI, we deliver tailored solutions aligned with your strategic ambitions and organizational needs.

Pilot & Deploy Use Cases

For organizations in the early stages of their (Gen)AI journey, BCG, BCG can help you get started by identifying and prioritizing high-impact AI use cases. Our approach enables you to quickly build, optimize, and scale pilots to full launch, ensuring tangible results from day one. BCG also provides workforce enablement to make sure your teams are ready to operate and benefit from AI-driven solutions.

Transform One End-to-End (E2E) Process

For organizations ready to take the next step, BCG supports scaling AI across an entire can help you transform a complete end-to-end process. Whether you're focusing on improving operational efficiency, customer experience, or another business area, we support you by mapping, redesigning, and implementing AI solutions across your processes. Our expertise ensures that your organization is prepared to fully adopt and integrate these changes, leading to significant performance gains.

Full (Gen)AI Transformation

BCG's most comprehensive offering is for organizations ready to fully embrace (Gen)AI. We'll work with you to set a bold ambition and strategy that redefines how your organization operates. From redesigning processes to building organizational maturity, BCG helps companies establish long-term success in an AI-powered world. This approach ensures rigorous change management to transform not just operations, but also culture and capabilities, creating a sustainable competitive advantage.

FIGURE 22

BCG Offering

BCG can support your journey across different initial ambition levels

Pilot & deploy use case

- Support ideation & prioritization of use cases
- Quickly build, optimize and scale pilot to full launch
- Train and enable workforce

Transform one E2E process

- Support in prioritizing E2E process
- Map & redesign process leveraging (Gen)AI automation as possible
- Prepare organization for use of new process

Full GenAI transformation

- Support in setting ambition, strategy & North-Star
- Redesign and optimize chosen processes towards North-Star
- Build organizational maturity and conduct rigorous change mgmt.

Why BCG?

BCG demonstrates a proven track record of delivering significant value through AI engagements, with over 1,000 AI solution builds and transformations in the last three years, resulting in approximately $50 billion in client value. BCG's extensive experience in GenAI is backed by our proprietary AI assets and accelerators, such as Knowledge.ai and AgentX, which enable rapid deployment and scaling of AI solutions. Additionally, our deep partnerships with leading technology providers like Google, OpenAI, Microsoft, and AWS ensure that our clients have access to the latest advancements and best practices in AI technology.

Our approach to implementing GenAI in GBS is grounded in key principles that drive sustainable value and transformation. We bring the full breadth of BCG's expertise and global experience to every engagement, ensuring that our solutions are co-created with clients to foster buy-in and long-term success. Our methodology emphasizes early success to gain traction, robust change management to drive adoption, and continuous capability building within client teams to ensure sustained impact. BCG's network of experts, including over 3,000 AI engineers and designers and 600+ GenAI practitioners, is complemented by our partnerships with academic institutions like Harvard University for executive training programs.

In the area of Excellence in Support Functions, Global Business Services and Global Capability Centers, a team of +100 global experts has built deep expertise on how technology and operating model best practices unlock exceptional value:

FIGURE 23

BCG Offering

We have a global network of 100+ gcc experts

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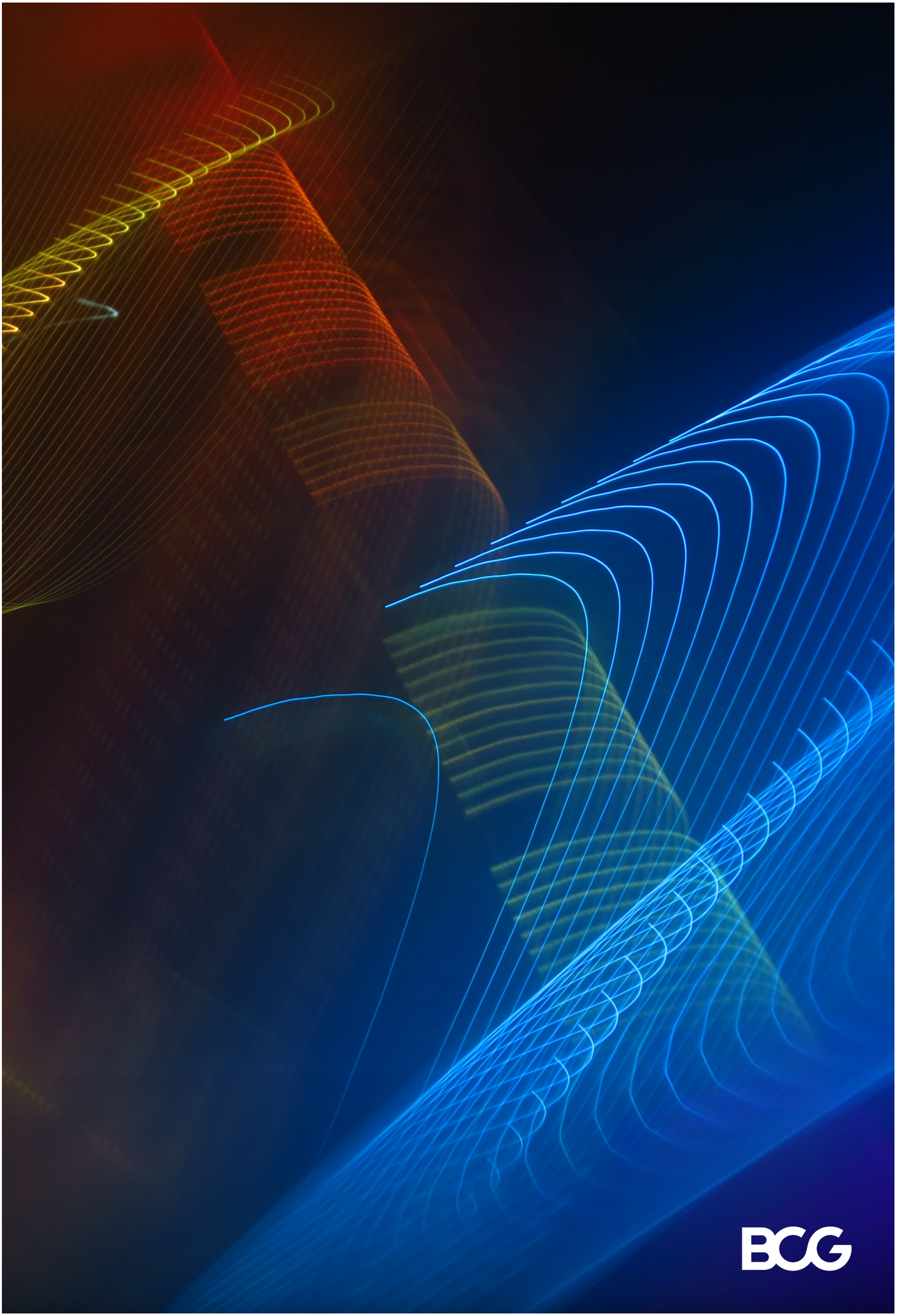
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