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GCC India 2026

Opportunity, Readiness & the People Gap

A Strategic Assessment for Decision-Makers, Founders & Policymakers

Sagar Burse Consulting

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sbcgroup.in

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SBC — Management Consulting for Organizational Readiness and Transformation

Sagar Burse Consulting (SBC) is an Ahmedabad-based management consulting firm focused on organizational readiness, transformation, and implementation support. SBC works with businesses, institutions, and policy-facing stakeholders on growth strategy, governance, capability building, and execution.

This report is part of SBC's knowledge publication series and examines whether institutional readiness is keeping pace with GCC expansion in India, particularly across emerging Tier-2 corridors. It draws on public sources, policy documents, industry reports, and SBC analysis to assess opportunity, readiness, and capability constraints.

Where relevant, the report uses GAP360™ as an internal analytical framework. Any composite indices or interpretive assessments are identified as SBC analysis.

Sagar Burse, PhD
Founder & Principal Consultant, SBC
Ahmedabad
June 2026

India's GCC sector is at an inflection point — scale is proven, readiness is not

2,100+	2.36M	~$60Bn	8%	170+
GCCs in India	Professionals employed	Annual GCC revenue	Qualify as top performers	New GCCs in 2025 alone

The Macro Surge is Real

India now hosts 2,100+ GCCs employing 2.36 million professionals, with revenues approaching $60 billion. 170+ new centres were added in 2025 — 51% were first-time entrants, not expansions. One in five Fortune 2000 companies now operates a GCC in India. The US remains dominant at 65% of parent HQs, but APAC-headquartered firms are the fastest-growing new entrant cohort.

The Tier-2 Opportunity is Now

Gujarat's GCC Policy 2025-30 targets 250+ new GCCs, 50,000+ jobs, and INR 10,000 Cr investment — with CAPEX support up to INR 200 Cr for mega projects and five years of OPEX coverage. Ahmedabad and Vadodara offer 35–42% cost advantage over Bengaluru. The policy is legally notified, fiscally specific, and already active. The window is open — but it will not stay open indefinitely.

The People Gap is the Constraint

Only 8% of GCCs qualify as top performers. (Gen)AI maturity averages 46/100 — a 16-point gap behind BPO and technology services peers. Culture scores high on empowerment at 89 but drops to 74 on agility. Attrition at the critical 3–7 year band runs at 18–25% annually. Scale is no longer the constraint. Readiness is.

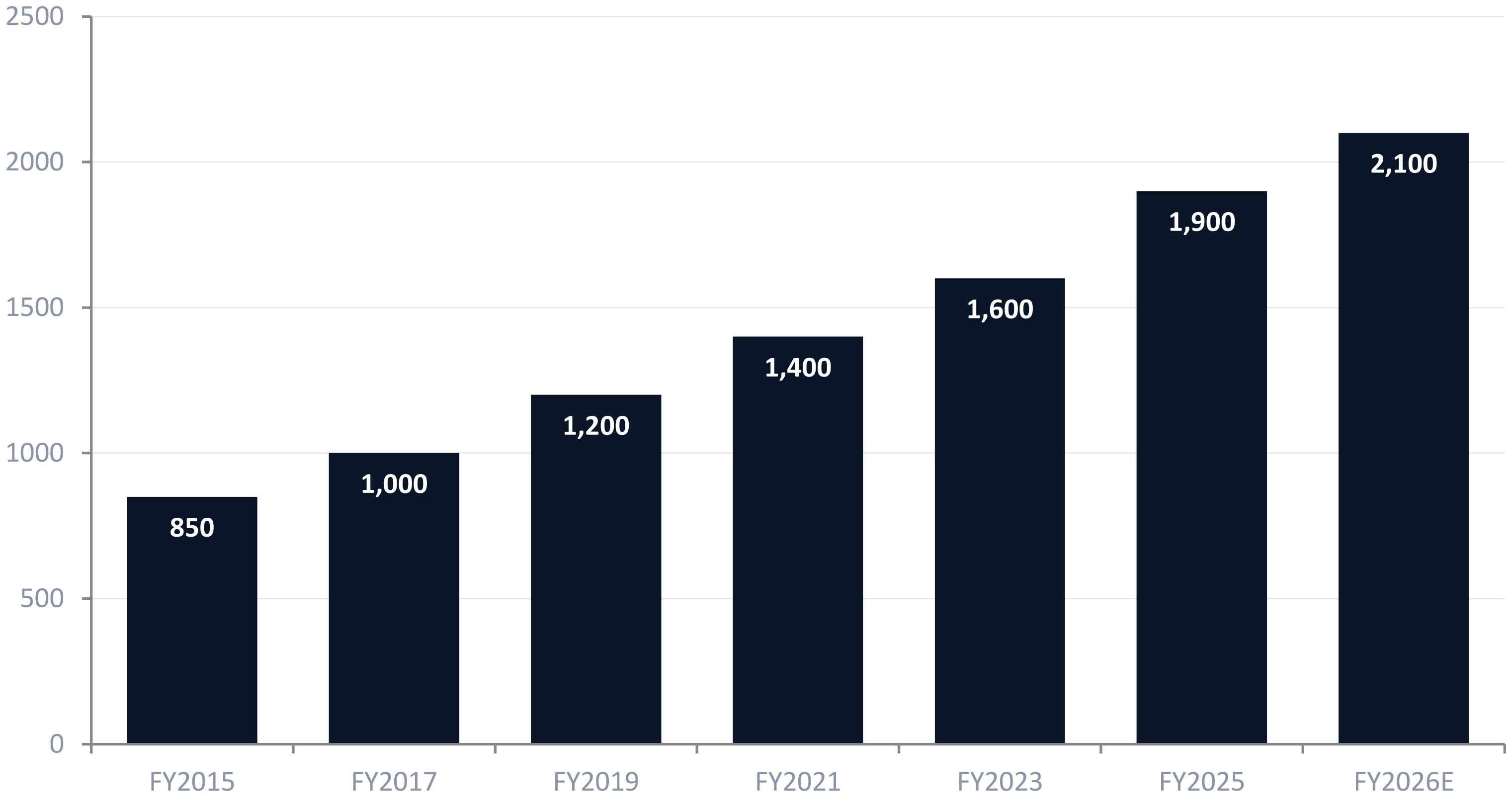
SECTION 1

The GCC Surge

India's Macro Story

Scale · Strategic Shift · Global Positioning

India's GCC count has more than doubled in a decade — 2,100+ centres, 2.36 million professionals



1 in 5 Fortune 2000

Companies now operate a GCC in India. This figure is expected to double by 2030 as India cements its role as the 'second headquarters' for global enterprises.

51% net-new entrants

Of 170+ GCCs set up in 2025, 51% were first-time entrants — not expansions. New capital, new mandates, new geographies.

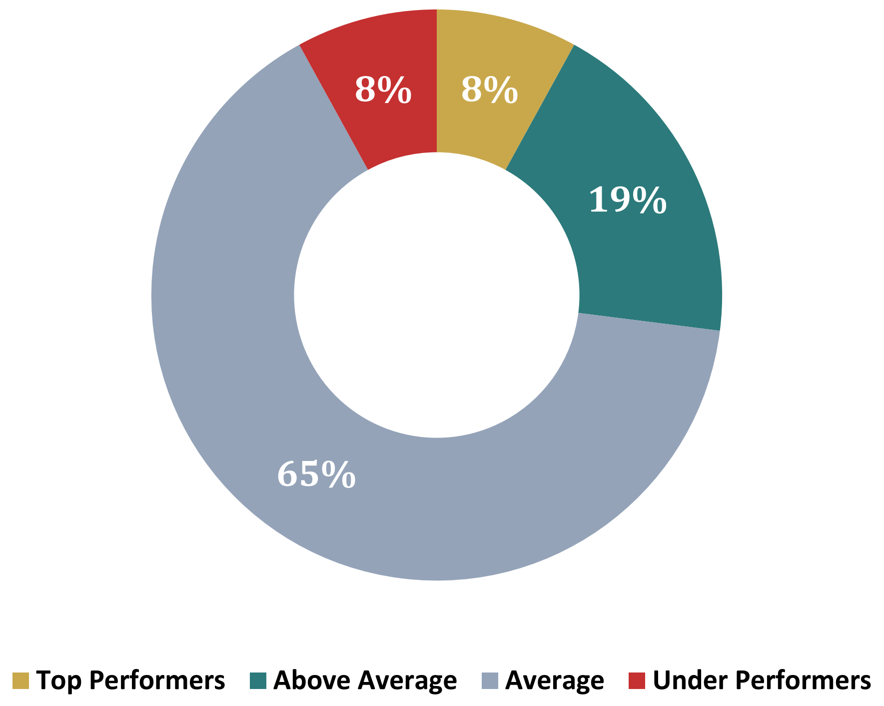
65% US-origin HQs

US remains the dominant parent geography. APAC-headquartered firms (Japan, Australia, Singapore) are the fastest-growing cohort entering India.

Over the past decade India's GCC ecosystem has fundamentally shifted from a cost-arbitrage model to a strategic talent and innovation base. Technology (28%), Engineering & Manufacturing (17%), and BFSI (15%) lead new additions. India already has twice the software engineering talent of the US (McKinsey, 2025).

Sources: NASSCOM, GCC Policies of India, Apr 2026 — community.nasscom.in/communities/global-capability-centers/gcc-policies-india | NASSCOM, Strategic Review 2026 — nasscom.in | McKinsey & Company, The Future of Global Centers, Apr 2025 — mckinsey.com/capabilities/operations/our-insights/the-future-of-global-centers | Note: FY2026E = estimated; historical data based on NASSCOM annual tracking

Only 8% of GCCs qualify as top performers — cost arbitrage alone no longer confers competitive advantage



Three Strategic Levers Defining GCC Maturity

01

Enterprise Efficiency (incl. Cost Advantage)

Process standardisation, P&L ownership, and cost competitive advantage. Only 41% of GCCs score above average. The baseline is eroding as wage inflation in Tier-1 cities accelerates at 8–12% annually.

41% above avg

02

Innovation

Ownership of innovation budgets and AI/data digitisation. Only 19% score above average — the majority still operate as execution centres, not innovation hubs. (Gen)AI maturity averages just 46/100 vs. 62/100 for BPO peers.

19% above avg

03

Market Advantage

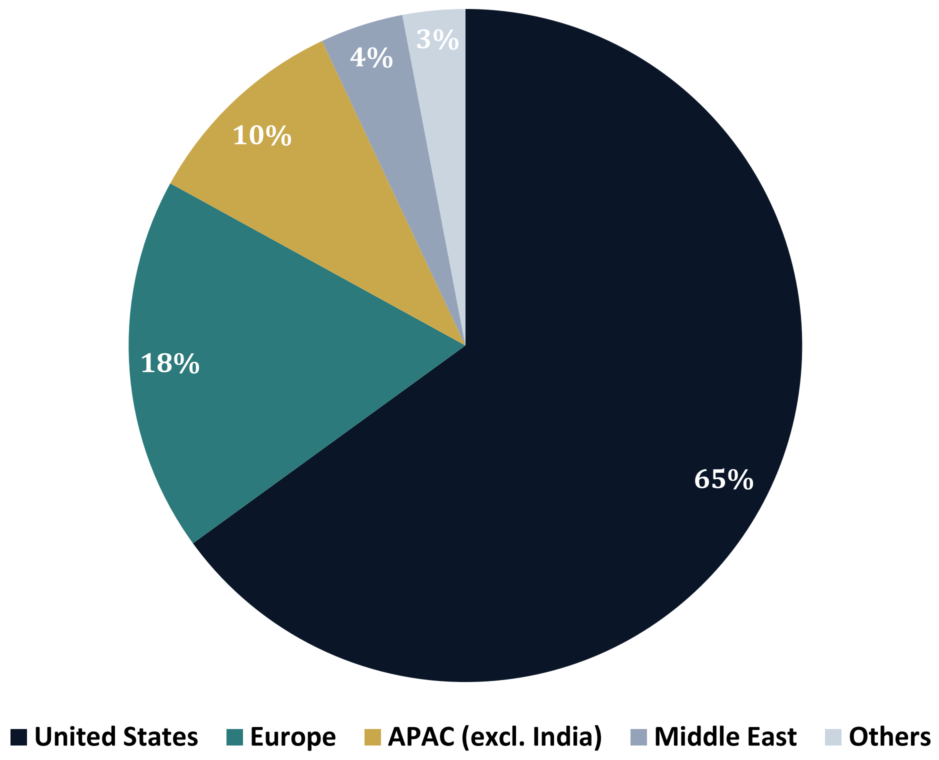
Customisation depth and product conceptualisation speed. 58% score above average — the most mature dimension, yet still the easiest to lose as Tier-2 competition intensifies.

58% above avg

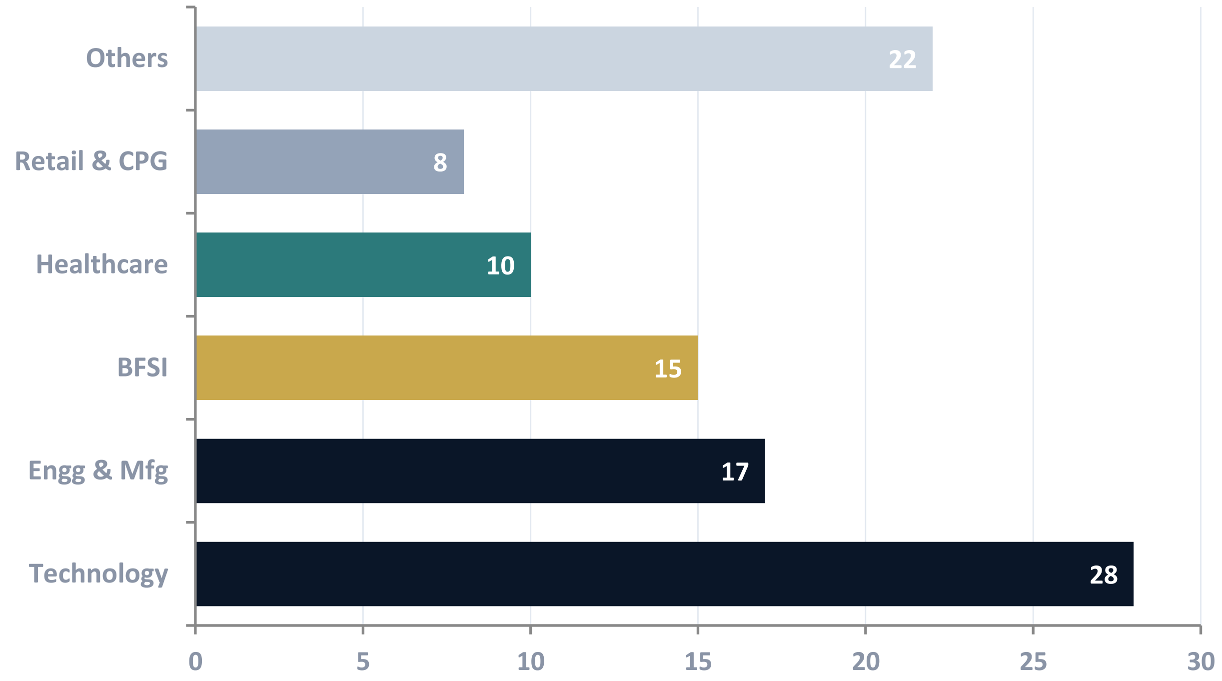
India strikes a rare balance: ~30% of Indian GCCs are mature performers while underperformance is limited to 6% — outpacing Poland (0% underperformance, but only 9% above average) and matching the US at scale.

Sources: BCG, Rewriting the GCC Playbook: Scaling Maturity with AI, Jun 2025, GCC Survey 2024 N=150 CXOs — bcg.com/publications/2025/rewriting-the-gcc-playbook | BCG, GCCs (Gen)AI Agenda, Apr 2025 — bcg.com | Note: Maturity scored 1–4 across three levers; Top Performer = score >=3 across all dimensions

US dominates GCC parent geographies at 65% — APAC is the fastest-growing new entrant cohort



New GCC Additions in 2025 — by Sector



Technology, Engineering & Manufacturing, and BFSI collectively account for 60% of new GCC additions — reflecting India's shift toward high-value, domain-intensive mandates. Global trade realignment is accelerating APAC inflows: Asia accounts for 60% of global growth, creating new GCC origination corridors beyond the US-India axis (McKinsey, Jan 2026).

Sources: NASSCOM, GCC Policies of India, Apr 2026 — community.nasscom.in/communities/global-capability-centers/gcc-policies-india | McKinsey, The Great Trade Realignment: Asia Rising, Jan 2026 — mckinsey.com/featured-insights/future-of-asia | Note: Sector data reflects new GCC additions CY2025; geography reflects parent HQ origin of active Indian GCCs

SECTION 2

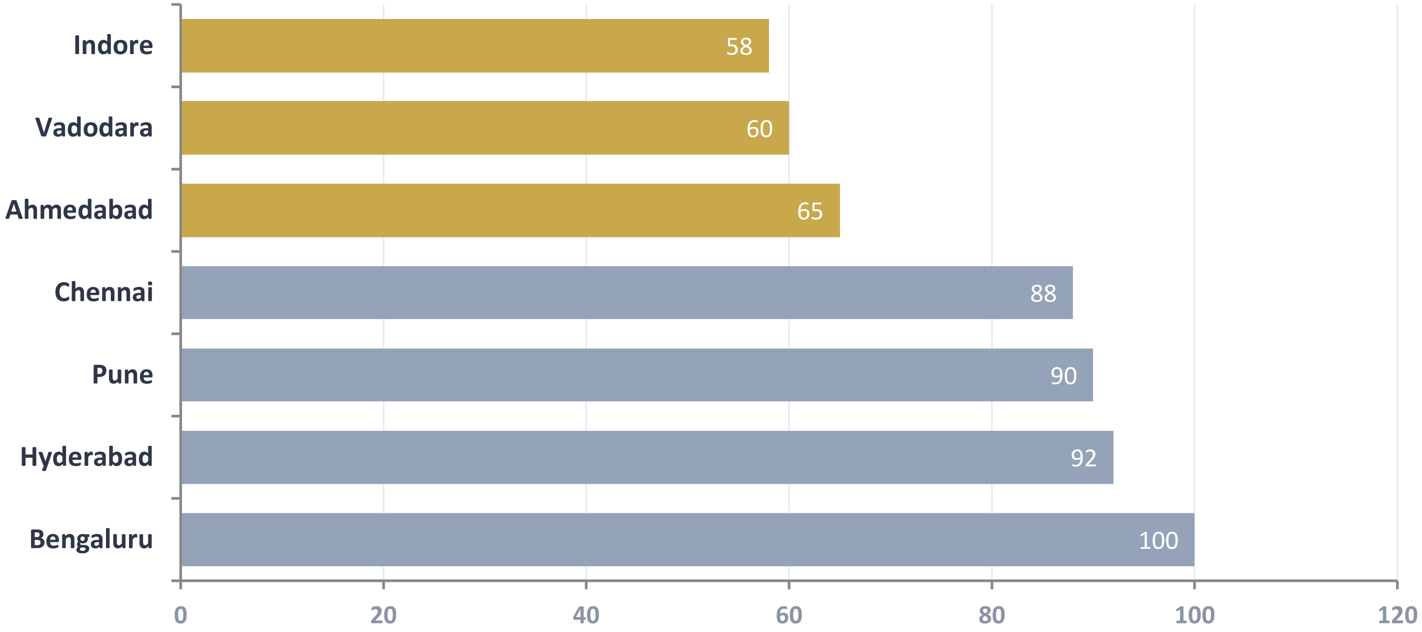
The Tier-2 Opportunity

Gujarat & Ahmedabad in Focus

State Policy · Cost Advantage · Ecosystem Readiness

Tier-2 cities are no longer a future story — Gujarat cities offer 35–42% cost advantage over Bengaluru

Estimated GCC Operational Cost Index (Bengaluru = 100)



Gujarat cities — 35–42% cost advantage

Collectively, India's GCC-active states are targeting 2,500+ new GCCs, 15 lakh new jobs, and INR 75,000 Cr in investment within five years. Gujarat's official policy (dated 11 Feb 2025) commits INR 10,000 Cr target with up to INR 200 Cr CAPEX support for mega projects — the most specific fiscal commitment of any Tier-2 state.

State GCC Policy Status — 2024–2026

State	Status	Period	Note
Karnataka	ACTIVE	2024-29	First mover; most mature ecosystem
Telangana	ACTIVE	2024+	Hyderabad anchor, strong IT base
Maharashtra	ACTIVE	2025	Mumbai-Pune corridor, BFSI focus
Gujarat	ACTIVE	2025-30	*250 GCCs, 50K jobs, INR 10,000 Cr*
Tamil Nadu	ACTIVE	2025	$1 Tn economy target by 2030
Rajasthan	DRAFT	2025	Jaipur positioning, announced

Sources: NASSCOM, GCC Policies of India, Apr 2026 — community.nasscom.in/communities/global-capability-centers/gcc-policies-india | Gujarat GCC Policy 2025-30, Resolution No. DST/ITM/e-file/24/2025/0173/IT, Govt. of Gujarat Dept. Science & Technology, dated 11 Feb 2025 | JLL, India GCC Office Guide 2026 — jll.co.in | Note: Cost index derived from JLL office market data; individual GCC costs will vary by function and specification

The Emerging GCC Capital of Western India

250+	50,000+	INR 10K Cr	32,000+
Target new GCCs	Target new jobs	Investment target	IT graduates/year
Policy Aim 2025-30	Direct employment	Policy period 2025-30	From Gujarat institutions

01 GIFT City

India's only International Financial Services Centre (IFSC) — unique regulatory sandbox for BFSI GCCs. Direct access to global financial markets infrastructure.

02 Institutional Depth

IIM-A, IIT-G, DA-IICT, Nirma, PDEU, Gujarat Technological University among 200+ institutions. 32,000+ IT graduates annually — and growing.

03 Incentive Architecture

CAPEX: 20-30% subsidy (up to INR 200 Cr for mega projects). OPEX: 5-year support covering cloud, power, R&D. EPF reimbursement 75-100%. Patent support up to INR 10L each.

04 Industrial Ecosystem

5,000+ ICT companies. USD 64 Bn FDI inflows (2000-2024). Strengths in Pharma, Engineering, BFSI, Petrochemicals — all priority GCC sectors.

05 Quality of Life Edge

Ahmedabad ranked 3rd in Ease of Living Index 2020. Per capita income 1.7x national average. Cost of living 35-40% lower than Bengaluru — critical for talent retention.

06 Policy Commitment

Resolution No. DST/ITM/e-file/24/2025/0173/IT dated 11 Feb 2025 — one of India's most specific GCC fiscal commitment documents, legally notified by Principal Secretary.

Sources: Gujarat GCC Policy 2025-30 (Resolution No. DST/ITM/e-file/24/2025/0173/IT, Govt. of Gujarat) | JLL India GCC Office Guide 2026 (jll.co.in) | NASSCOM GCC Policies of India, Apr 2026

Gujarat's 2025-30 GCC Policy delivers one of India's most specific fiscal commitment frameworks

01

CAPEX Support

20% subsidy on building/fixed assets; 30% on computers & software. Ceiling: INR 50 Cr (Category I) and INR 200 Cr (Mega Projects, GFCI >= INR 250 Cr or 500+ employees). Disbursed in 20 equal quarterly instalments.

02

OPEX Support — 5-Year Coverage

Cloud rental, power tariff, patent expenditure (up to INR 10L per patent, 10 patents/year). EPF reimbursement: 75% for male, 100% for female employees for 5 years. Encourages retention and hiring.

03

Employment Generation Incentive

INR 50,000 per male employee, INR 60,000 per female employee — one-time, per unique job retained for minimum 1 year. Minimum 50 employees to qualify. Direct incentive for headcount growth.

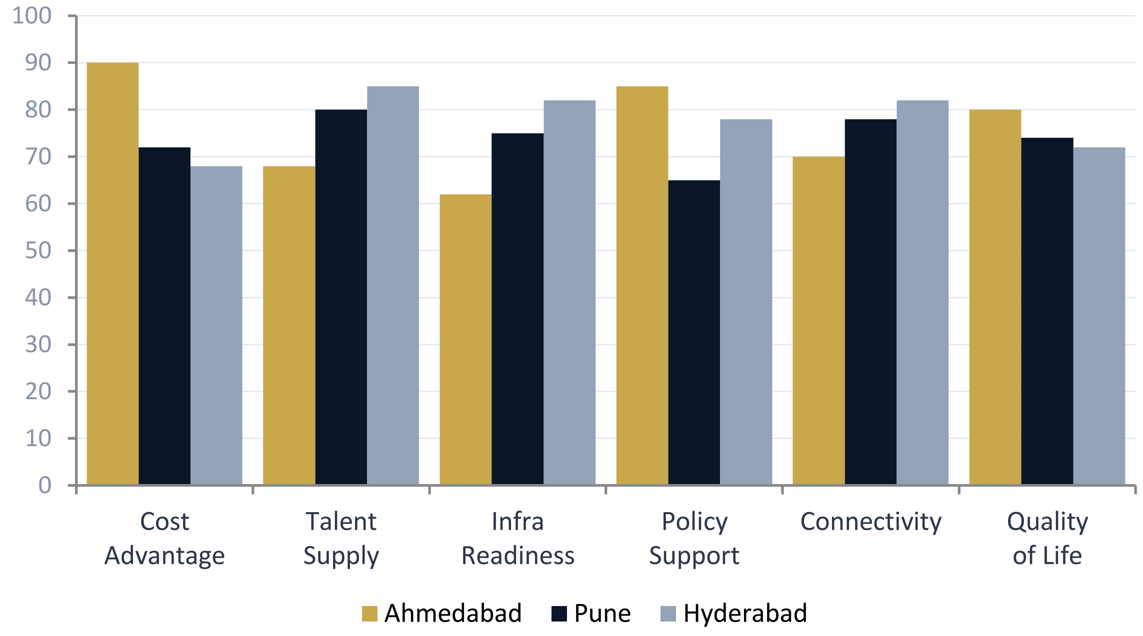
04

Skilling & Quality Certification

50-75% reimbursement of globally recognised course fees (up to INR 50,000 per course). 80% reimbursement of quality certification fees (up to INR 10L, 5 certifications). Focus: AI, cloud, data certifications.

Ahmedabad Readiness vs. Peer Cities

Score out of 100 — composite index across 6 readiness dimensions



Ahmedabad's standout dimension is Cost (90) and Policy Support (85, post Feb 2025 policy notification). Talent supply and infrastructure are areas of active investment — the gap is narrowing, not widening. Gujarat produces 32,000+ IT graduates annually from 200+ institutions including IIM-A and IIT-G.

Sources: Gujarat GCC Policy 2025-30, Resolution No. DST/ITM/e-file/24/2025/0173/IT | JLL, India GCC Office Guide 2026 — jll.co.in | KPMG India, Global Capability Centres Hub 2025-26 — kpmg.com/in | Note: Readiness scores are SBC composite indices based on JLL, NASSCOM, and KPMG data; not an official ranking

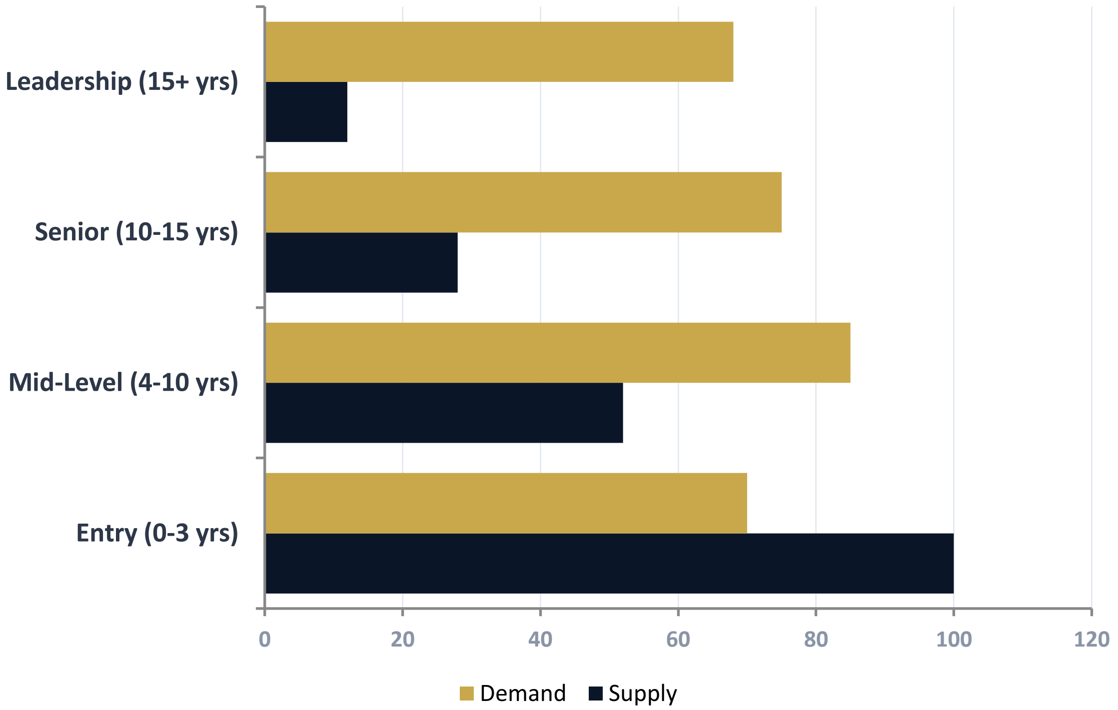
SECTION 3

The People & Leadership Gap

Talent Crisis · Mid-Level Vacuum · AI Skills Deficit · Culture

India produces a surplus at entry level — yet GCCs report a critical mid-level leadership vacuum

GCC Talent Pyramid — Supply vs. Demand Gap (Index: Entry Supply = 100)



GCC Annual Attrition — Primary Drivers

18–25%

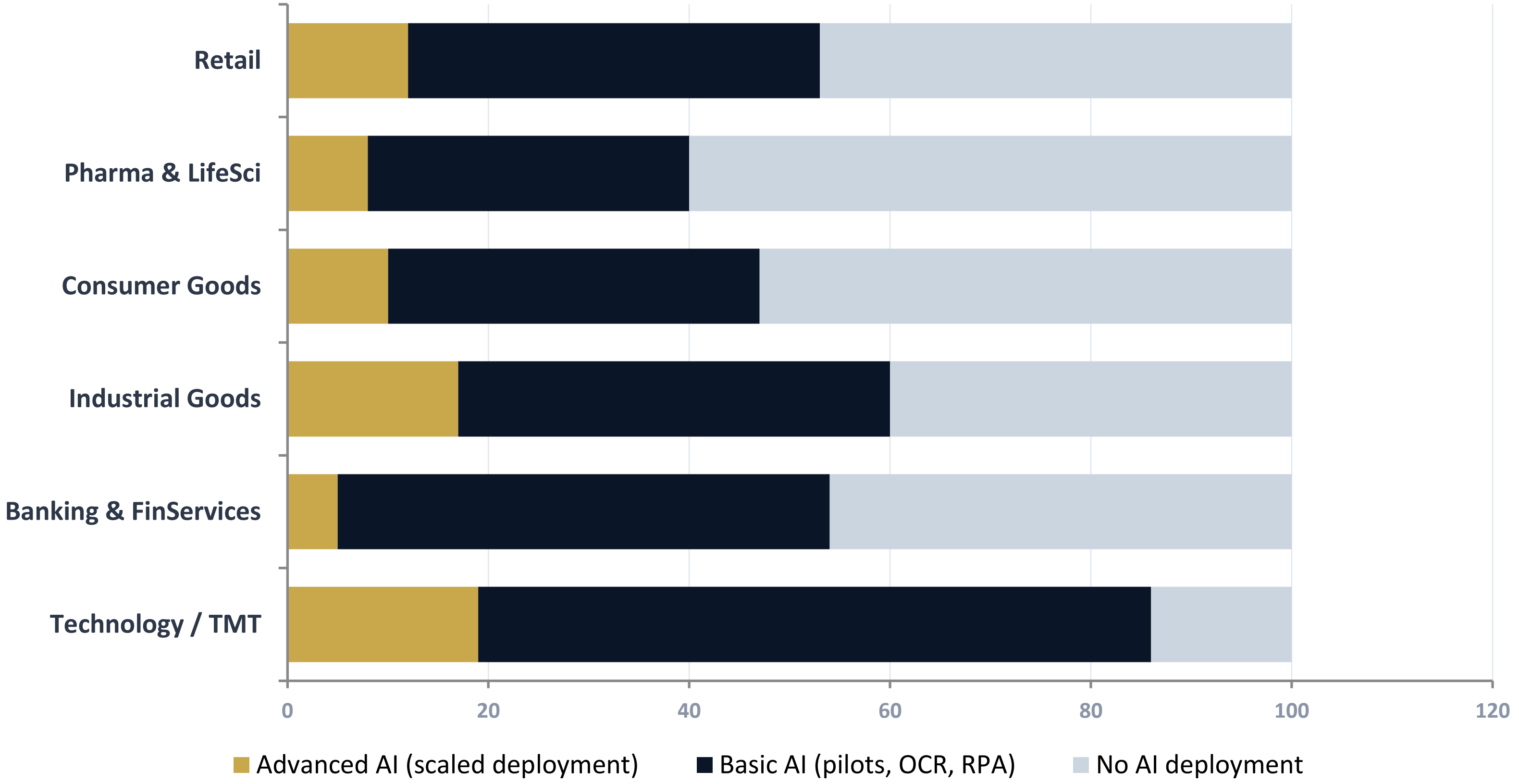
Annual attrition across India GCCs
Culture Index: 82/100 (Empowerment: 89; Agility: 74 — lowest dimension)
Top performers: 12-15% | Under performers: 28-35%

01	EVP failure — no differentiated employee value proposition	**34%**
02	Limited career growth pathways beyond technical roles	**27%**
03	Compensation gap vs. Big Tech / product companies	**19%**
04	Inadequate AI / skill development investment (agility scores avg. 74/100)	**12%**
05	Manager quality and on-ground leadership depth	**8%**

~70% of top-performing GCCs host a significant number of global roles in hubs vs. ~10% for underperformers (BCG, 2025). 50%+ of top performers have a fully activated, robust EVP — 6x higher than underperformers. Nearly 95% of GCCs score high in empowerment and inclusion — but only 23% demonstrate high agility (Deloitte, 2025).

Sources: BCG, Rewriting the GCC Playbook, Jun 2025, N=150 — bcg.com | Deloitte India, India's GCCs Lead in Empowerment and Inclusion, Jul 2025 — deloitte.com/in/en/about/press-room/indias-gccs-lead-in-empowerment | People Matters, GCC Talentscope 2026 — peoplematters.in | McKinsey, The Future of Global Centers, Apr 2025 — mckinsey.com | Note: Talent pyramid is indicative based on industry surveys; attrition driver percentages from Deloitte Culture Sensing 2025

GCC (Gen)AI maturity averages 46/100 — far below BPO & tech services peers at 62/100



Maturity score: 46/100

GCCs average 46/100 on BCG's (Gen)AI maturity framework vs. 62/100 for BPO & tech peers — a 16-point structural gap driven by Operating Model (43/100) and People & Talent dimensions.

20-30% productivity potential

BCG projects 20-30% productivity uplift and 30-40% workforce reallocation from repetitive to higher-value tasks for GCCs that scale (Gen)AI properly. Current savings do not exceed 5-10% of baseline.

70%+ started — but fragmented

Over 70% of GCCs have initiated GenAI. Yet only <20% allocate more than $15M. 91% have not reassessed partner contracts for AI alignment. Fragmentation is the core constraint.

GenAI adoption is not a straight line. It follows a three-phase path: identify and validate use cases → scale → refine and optimise. Most GCCs remain in phases 1-2. The most successful early adopters focus on 'knowledge synthesis' and 'content generation' use cases — not just task automation (BCG GenAI Agenda, 2025).

Sources: BCG, GCCs (Gen)AI Agenda: A Need to Shift from Incremental Experimentation to Enterprise-Wide Transformation, Apr 2025, N=150 — bcg.com | BCG, Rewriting the GCC Playbook, Jun 2025 — bcg.com/publications/2025/rewriting-the-gcc-playbook | NASSCOM, Strategic Review 2026 — nasscom.in | Note: AI deployment figures represent % of GCC respondents by industry; Advanced AI = GenAI, NLP, real-time decision support at scale

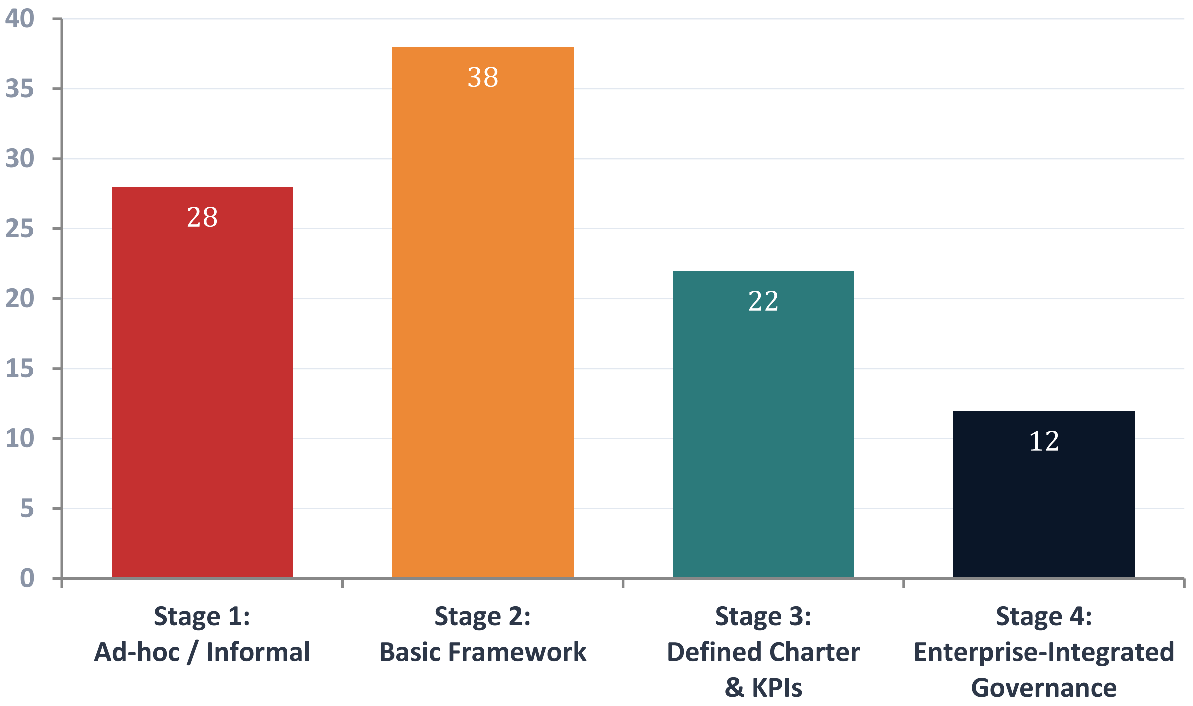
SECTION 4

Governance & Operational Readiness

Operating Models · Compliance · ERP Architecture · Data Governance

Most mid-market GCCs operate without a defined governance charter — a structural risk as scrutiny intensifies

GCC Governance Maturity — Distribution of Centres (%)



01

UK Corporate Governance Code — Provision 29

Effective 1 Jan 2026: Boards of UK-listed parent companies must annually review design and operating effectiveness of internal controls. GCCs serving UK parents are directly in scope. Many have not begun compliance mapping.

02

National Framework — Three-Tier Governance

Deloitte + CII (Jul 2025) calls for: National GCC Council, dedicated Cells (Investment, Talent, Infrastructure, Regulatory), and State GCC Facilitation Committees. Governance is now a national policy priority, not just an internal GCC matter.

03

ERP & Outcome-Based KPI Architecture

Only 41% of GCCs track outcome-based KPIs vs. ~10% of underperformers (BCG, 2025). Average (Gen)AI Operating Model maturity: 43/100. Without data governance and ERP integration, P&L ownership remains nominal.

66% of GCCs currently operate at Stage 1 or 2 — ad-hoc or only basic governance. This is incompatible with the expanded mandates being assigned: end-to-end process ownership, P&L accountability, and global risk management. The India DPDP Act 2023 (operational via 2025 Rules) adds a new enforceable data governance baseline for all GCCs.

Sources: Deloitte + CII, National Framework on GCCs, Jul 2025 — deloitte.com | KPMG India, Navigating the UK Corporate Governance Code: Supporting GCCs in India, 2025 — kpmg.com/in | KPMG India, Beyond Borders, Within Rules: GCCs Navigating Privacy (DPDP Act), 2025 — kpmg.com/in | BCG, Rewriting the GCC Playbook, Jun 2025 — bcg.com | Note: Governance maturity distribution indicative, based on BCG GCC Survey 2024 and Deloitte industry consultations

SECTION 5

The GAP360™ Lens

SBC's Proprietary Diagnostic Framework

GAP360™ (Growth Acceleration Pathway 360°) maps GCC readiness across six dimensions — identifying where the gap is, not merely that one exists

GAP360™

Diagnostic Framework

01 Strategy

Diagnostic question: Is the GCC's mandate aligned with the parent enterprise's 3-5 year ambition? Has it earned the 'right to lead' — or is it still justified only on cost?

02 Structure

Diagnostic question: Are decision rights clearly defined? Do global roles reside in the hub, or remain concentrated at HQ? Is the operating model hub-and-spoke or flat delivery?

03 Systems

Diagnostic question: Is ERP, data governance, and process architecture mature enough to support P&L ownership and outcome-based KPIs? Is the DPDP Act compliance framework in place?

04 Skills

Diagnostic question: Is the workforce AI-ready? Does the talent pyramid have depth at mid and senior levels — or only at entry? What is the (Gen)AI maturity score?

05 Leadership

Diagnostic question: Is there a strong, locally empowered GCC leadership layer with real P&L accountability? Is the EVP designed and activated to retain high performers?

06 Culture

Diagnostic question: Does the GCC have a distinct identity — or is it a shadow of HQ? Is agility and innovation behaviourally rewarded? What is the Culture Index score?

The GAP360™ framework is applied as a structured diagnostic — not a scorecard. Each dimension generates a gap profile mapped against sector benchmarks and the four GCC archetypes (next slide). The output is a prioritised, sequenced intervention roadmap — not a generic maturity label.

GAP360™ Methodology — How We Execute

Six phases. One outcome. From diagnosis to a business or GCC that runs on systems — not on SBC's continued presence.

D	A	A	D	I	S
DIAGNOSE	ALIGN	ANALYSE	DESIGN	IMPLEMENT	SUSTAIN

D Phase 01

DIAGNOSE

The Foundation

Audit across all 6 dimensions. Every gap identified, root-mapped and quantified in ₹/$ impact. The baseline from which transformation begins.

Multi-session audit across all business functions.

A Phase 02

ALIGN

SBC's Distinctive Phase

Secure leadership commitment before design begins. The phase most frameworks skip — and the most common reason transformation stalls.

Stakeholder workshops, leadership briefings, mandate clarity sessions.

A Phase 03

ANALYSE

Root Cause Mapping

Root cause mapping beyond symptoms — understanding systems failures and accountability gaps driving each problem. Output: prioritized gap register.

Gap register · Impact scoring · Interdependency mapping

D Phase 04

DESIGN

Tailored Solution Architecture

SOPs, KRA/KPI frameworks, reporting structures, org redesign — built for your context. Practical and people-ready, not just elegant.

SOPs · KRA/KPI · Org design · Reporting architecture

I Phase 05

IMPLEMENT

Hands-On Execution

Hands-on execution alongside your team — not remote advisory. SBC is present, managing resistance and driving adoption in real time.

On-site presence · Change management · Real-time course correction

S Phase 06

SUSTAIN

Systems That Outlast SBC

30-60-90 day reviews, dashboards and performance cadences. A business or GCC that runs on systems — not on SBC's continued presence.

Management dashboards · Review cadences · Performance audits

Four GCC archetypes emerge — each requiring a fundamentally different intervention pathway

OPERATIONAL MATURITY (HIGH / LOW) × STRATEGIC READINESS (LOW / HIGH)

THE STRATEGIC LEADER

High Strategy / High Operations

The top 8%. Full mandate, enterprise-integrated governance, AI at scale, EVP activated, global leaders based in hub.

GAP360™ Rx: Focus on sustaining differentiation and building the next generation of global leaders from within.

THE STRANDED PERFORMER

High Strategy / Low Operations

Vision is right; the engine is not ready. Mandate outpaces delivery capability and governance maturity.

GAP360™ Rx: Prioritise structural and systems gaps first. Build operational scaffolding before expanding mandate.

THE EXECUTION ENGINE

Low Strategy / High Operations

Strong delivery machine — on the cost-arbitrage model. Faces obsolescence as AI automates the core work.

GAP360™ Rx: Mandate expansion before AI displacement. Time, not intent, is the constraint.

THE HOLLOW SHELL

Low Strategy / Low Operations

Unclear mandate, informal governance, high attrition. Vulnerable to being collapsed back to HQ.

GAP360™ Rx: Leadership gap is the first and only intervention. Without it, operational fixes will not hold.

LOW HIGH

STRATEGIC READINESS

How GAP360™ Is Applied

1. **Diagnostic Intake**
   Structured interviews across all 6 dimensions with GCC leadership, HR, and business stakeholders.
2. **Gap Profiling**
   Each dimension scored against sector benchmarks. GCC archetype assigned from the 2x2 matrix.
3. **Intervention Roadmap**
   Prioritised, sequenced actions by impact and readiness — not generic best practice.
4. **Progress Review**
   Quarterly pulse checks. GAP360™ is a living instrument, not a one-time assessment.

SECTION 6

SBC RECOMMENDATIONS & WAY FORWARD

For GCC Leaders · HR Leaders · Policy Makers

Three audiences, three mandates — action must be simultaneous, not sequential

For GCC Leaders & MNCs

01 Run a readiness diagnostic before expanding mandate — governance must precede headcount

02 Activate a differentiated EVP — compensation alone will not close the attrition gap

03 Embed a GCC-resident leader with real P&L accountability — not a liaison role

04 Fund a (Gen)AI Centre of Excellence with dedicated budget — pilots do not scale

05 Assign a GCC archetype and build an intervention roadmap specific to that stage

For HR & People Leaders

01 Restructure the talent pyramid — mid-level acquisition needs its own dedicated strategy

02 Build (Gen)AI literacy horizontally — the skills gap is not confined to tech functions

03 Create non-linear career tracks — the mid-level vacuum is a design failure, not a supply failure

04 Launch diaspora and repatriation programmes — especially relevant for Gujarat-based GCCs

05 Measure EVP activation quarterly — not annually

For State Governments

01 Accelerate incentive disbursement — speed of approval is now a competitive differentiator

02 Co-invest in GCC-aligned curriculum at GTU, DAIICT, PDEU, Nirma — talent is the binding constraint

03 Build city-specific GCC value propositions — Ahmedabad, Vadodara and Surat each have distinct sector strengths

04 Publish a public Gujarat GCC Performance Dashboard — track jobs and investment quarterly

05 Position GIFT City as a dedicated BFSI GCC sandbox — it is an underutilised differentiator

Sources: BCG GCC Playbook 2025 (bcg.com) | BCG GCC GenAI Agenda 2025 (bcg.com) | Deloitte + CII National Framework on GCCs Jul 2025 (deloitte.com) | NASSCOM GCC Policies of India Apr 2026 (community.nasscom.in) | Gujarat GCC Policy 2025-30 (DST Gujarat) | McKinsey The Future of Global Centers 2025 (mckinsey.com)

CONCLUSION

India's GCC story is at its most consequential inflection point.

"India has built the infrastructure of scale. What remains to be built — urgently and deliberately — is the infrastructure of readiness: leadership depth, governance maturity, AI capability, and talent architecture capable of sustaining the mandates now being placed on these centres by global parent enterprises and by a national policy ecosystem that is, for the first time, fully aligned around GCC-led growth.

The data is unambiguous. Only 8% of GCCs qualify as top performers. (Gen)AI maturity averages 46/100. The mid-level leadership pipeline is structurally thin. Attrition at the critical 3–7 year band continues to erode institutional knowledge faster than it can be rebuilt. These are not cyclical problems. They are architectural ones — and they require architectural responses.

For Gujarat and Ahmedabad, this is a moment of genuine and time-bound strategic advantage. Cost competitiveness, an active state policy framework, GIFT City's institutional gravity, and an underserved but capable talent market are converging simultaneously. This window will not remain open indefinitely. The question is not whether the opportunity exists — it plainly does. The question is whether it will be seized with the rigour, the governance discipline, and the people investment that the opportunity demands.

SBC offers this report not as a commentary on India's GCC momentum, but as a working instrument for those who intend to shape it.

-- Dr. Sagar Burse | Founder & Principal Consultant, SBC

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Empowering Change · Delivering Impact

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Our Expertise

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- Institution Building
- Strategic Research
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