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BEYOND HIRING

Talent Intelligence Report

Pharma, Healthcare & Life Sciences GCCs | 2026

Why it matters. What is changing beneath the surface.
What executives should do differently.



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EXECUTIVE SUMMARY

Twenty years ago, India's IT industry changed the way global companies thought about talent.

Today, a similar story is unfolding in Pharma, Healthcare and Life Sciences, but with a crucial difference. This time, the opportunity isn't built on scale alone. It's built on scientific expertise, AI capability and multidisciplinary talent that is becoming increasingly difficult to find.

India's Pharma, Healthcare and Life Sciences (PHLS) Global Capability Centre ecosystem has evolved far beyond its traditional role as an execution hub. Today, it is where global enterprises are designing the next generation of healthcare innovation.

Drug discovery is becoming AI-assisted. Clinical development is becoming data-led. Regulatory affairs are becoming increasingly digital. Commercial decisions are powered by real-time analytics rather than historical reporting. As the nature of work evolves, so does the nature of talent.

As organisations accelerate investments in biologics, digital therapeutics, AI-powered healthcare and next-generation research, demand for specialised capabilities is growing faster than the market can produce them. The shortage is not one of workforce volume, but of capability.

Scientific expertise must increasingly coexist with data science, artificial intelligence, regulatory knowledge and digital fluency, creating a new class of multidisciplinary professionals who remain scarce across the market. For Talent Leaders, this marks a fundamental shift in priorities. Success will no longer be defined solely by hiring velocity or headcount growth, but by an organisation's ability to anticipate capability gaps, access niche talent pools and build skills ahead of market demand. In an increasingly competitive landscape, talent intelligence is becoming as critical to business strategy as financial or operational intelligence.

This report examines the forces reshaping India's PHLS talent landscape from the evolution of the GCC ecosystem and regional talent hubs to AI adoption, emerging capability gaps and location intelligence. More importantly, it explores the strategic questions that will define workforce success in the years ahead:

- Which capabilities are becoming structurally scarce?
- Where is talent supply strongest and where are the emerging gaps?
- How is AI reshaping workforce demand across the PHLS value chain?
- Which locations offer the strongest long-term talent advantage?
- What hiring strategies will help organisations build sustainable competitive advantage?

The organisations that lead the next decade of healthcare innovation will not necessarily be those with the largest workforce. They will be the ones that build the right capabilities before the rest of the market does.





PHLS ECOSYSTEM OVERVIEW

India has emerged as the largest Pharma, Healthcare and Life Sciences (PHLS) capability hub outside the United States and Europe, driven by its deep scientific talent, mature digital ecosystem, and strong capabilities across the pharmaceutical and healthcare value chain. Today, PHLS Global Capability Centres (GCCs) are evolving beyond traditional support functions to become strategic innovation hubs, delivering high-value work across research, clinical development, pharmacovigilance, regulatory affairs, enterprise technology, and commercial operations.

150+

PHLS GCCs operating in India

150k+

Skilled Professionals Across India GCCs

~50%

Top 50 Life Sciences Companies have GCCs in India

PHLS ECOSYSTEM OVERVIEW

GCC TYPE	EST. HEADCOUNT	GLOBAL PLAYERS	KEY FUNCTIONS
Healthcare IT / Digital Health	~45,000–50,000	Cerner, PHILIPS, veradigm, McKESSON, Optum	EHR, HL7/FHIR, AI-enabled telehealth platforms
Pharmaceutical R&D	~35,000–40,000	AstraZeneca, NOVARTIS, Pfizer, abbvie, gsk, SANOFI, Merck KGaA, Lilly, Roche, BAYER	Drug discovery, bioinformatics, pre-clinical data management
Payer & Health Insurance	~25,000–28,000	Cigna, Optum, Humana, United Healthcare, Elevance Health	Claims analytics, fraud detection, utilisation management
Medical Devices & Diagnostics	~18,000–25,000	Medtronic, BD, stryker, SIEMENS Healthineers, Abbott, GE HealthCare, PHILIPS Healthcare	R&D engineering, MDR/ISO regulatory affairs, quality systems
CROs	~12,000–14,000	IQVIA, Syneos Health, COVANCE by labcorp, ThermoFisher SCIENTIFIC	Clinical trial ops, biostatistics, regulatory submissions
Hospital & Provider GCCs	~6,000–8,000	IQVIA TECHNOLOGIES, medidata, CERTARA, AXTRIA, ZS	LIMS/PLM/ERP implementation, AI/ML for drug development, Pharma Commercial Analytics
Life Sciences Technology	~8,000–10,000	HCA Healthcare, KAISER PERMANENTE, Tenet Health, Providence, Cleveland Clinic	Revenue cycle management, clinical informatics
CDMOs	~1,500-2,000	Lonza, Catalent, Recipharm, ThermoFisher SCIENTIFIC	Process development, formulation CMC, scale-up support

Segment Momentum Snapshot

23 of the world's top 50 life sciences companies have established Global Capability Centres in India over the past five years. GCCs manage EHR platforms, telehealth infrastructure, AI diagnostics, and population health analytics for U.S. and European parent orgnisations.

Driven by the impending patent cliff, with nearly 70 blockbuster drugs losing exclusivity by 2030, India GCCs now manage ~45% of global drug discovery activity and reduce R&D-to-launch costs by 15–25%.

Indian GCCs now manage ~60% of global Regulatory Affairs activity for parent organisations.

GCC FOOTPRINT ACROSS FUNCTIONS (1/2)

Traditionally concentrated in enabling functions, GCCs have, over the past five years, significantly expanded into core Pharma, Healthcare, and Life Sciences functions, driving innovation, scientific excellence, and global business.

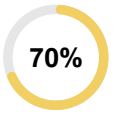
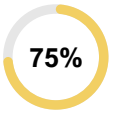
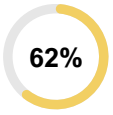
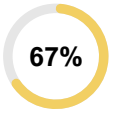
Core Functions

GCC Penetration	Key Responsibilities Owned by India GCC	Business Value Delivered
Drug Discovery & Development 45%	• Bioinformatics • Computational biology • Molecular modelling • Clinical Data Management	• Faster target identification • Accelerated drug discovery • improved R&D productivity
Regulatory Affairs 60%	• Regulatory intelligence • Dossier preparation • Submission management • Labeling • Compliance support	• Faster regulatory submissions • Improved compliance • Reduced documentation cycle times
Medical Affairs 54%	• Medical writing • Scientific communications • Literature review • Medical information services • Real-world evidence (RWE)	• Enhanced scientific engagement • Faster evidence generation • Improved medical content quality
Commercial Operations 50%	• Omnichannel marketing • CRM support • Pricing & reimbursement analytics • Sales operations • Market analytics	• Better customer engagement • Optimized commercial performance • Data-driven brand strategy

GCC Penetration

GCC FOOTPRINT ACROSS FUNCTIONS (2/2)

Enabling Functions

GCC Penetration	Key Responsibilities Owned by India GCC	Business Value Delivered
Finance 	• Financial Planning & Analysis (FP&A) • Accounting • Tax • Treasury • Procurement • Compliance • Enterprise reporting	• Faster financial close • Improved forecasting • Cost optimization • Data-driven decision making
Human Resources 	• Talent acquisition • HR operations • Workforce planning • Learning & development • Employee experience • HR analytics	• Global talent strategy • Improved workforce productivity • Standardized HR operations • AI-enabled employee experience
Supply Chain 	• Demand planning • Procurement • Inventory optimization • Manufacturing support • Logistics analytics	• Supply chain resilience • Improved inventory utilization • Reduced operational costs
Information Technology 	• Enterprise applications • Cloud engineering • Cybersecurity • Data platforms • AI/ML Centers of Excellence (CoEs) • Digital product engineering	• Accelerated digital transformation • Scalable technology platforms • Enhanced cybersecurity

GCC Penetration



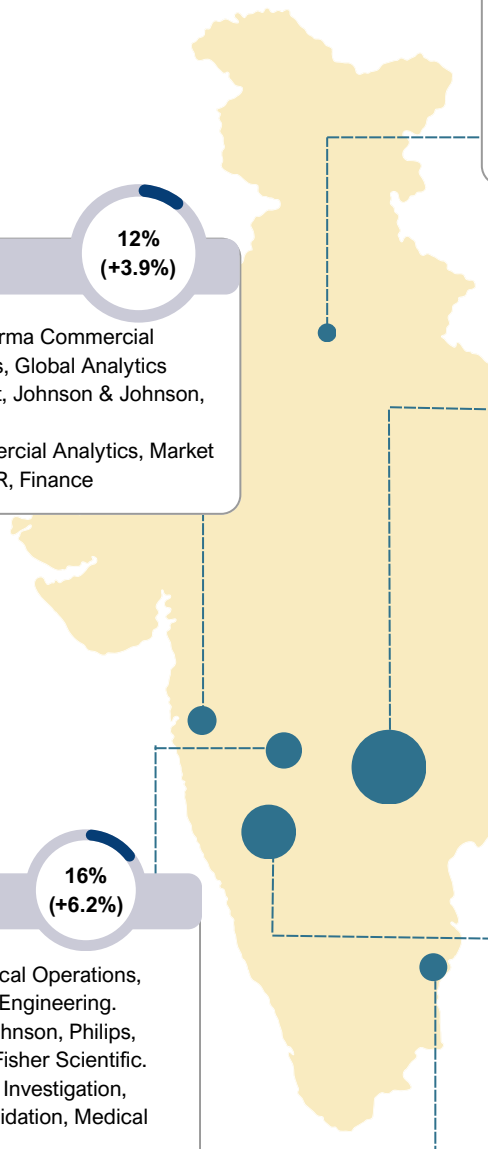
LOCATION INTELLIGENCE

As PHLS GCCs evolve into centres of scientific research, AI innovation, and global product ownership, location decisions have become strategic business decisions rather than real estate choices. Each Indian talent hub offers distinct strengths, from Hyderabad's deep pharmaceutical ecosystem and Bengaluru's AI capabilities to Pune's medical devices expertise and emerging Tier-2 centres that provide specialized talent at lower operating costs.

The ability to align business functions with regional talent ecosystems enables organisations to improve hiring outcomes, accelerate time-to-productivity, optimize costs, and build resilient long-term workforce strategies.

> ***Location strategy today is about prioritizing capability concentration over cost arbitrage and headcount expansion."***

ESTABLISHED HUBS



Delhi NCR

6% (+3.4%)

- **Dominant Segments** - Medical Devices, Global Supply Chain, Corporate Functions
- **Key Players** - Boston Scientific, Stryker, Becton Dickinson, Hologic, Olympus
- **Core Talent Pools** - Regulatory Affairs, Supply Chain, Procurement, Finance

Mumbai

12% (+3.9%)

- **Dominant Segments-**Pharma Commercial Operations, Market Access, Global Analytics
- **Key Players-**Pfizer, Abbott, Johnson & Johnson, Novartis, Roche
- **Core Talent Pools-**Commercial Analytics, Market Access, Forecasting, HEOR, Finance

Hyderabad

30% (+11.2%)

- **Dominant Segments-**Pharma R&D, Clinical Development, Regulatory Affairs, Drug Safety, AI & Data Science
- **Key Players-**Novartis, Sanofi, Bristol Myers Squibb, Amgen, Roche, Bayer, Eli Lilly, Parexel, IQVIA, Optum
- **Core Talent Pools-**Regulatory Affairs, Pharmacovigilance, Biostatistics, Clinical Data Management, Medical Writing, AI/ML, Actuarial Medicare

Bengaluru

20% (+4.8%)

- **Dominant Segments-**Digital Health, Healthcare IT, Advanced Analytics, Drug Discovery Informatics
- **Key Players-**IQVIA, Philips, Medtronic, GE HealthCare, Siemens Healthineers, Roche, Smith+Nephew
- **Core Talent Pools-**Data Science, AI/ML, Software Engineering, Product Development, Bioinformatics

Pune

16% (+6.2%)

- **Dominant Segments-** Clinical Operations, Medical Devices, Quality & Engineering.
- **Key Players-** Johnson & Johnson, Philips, IQVIA, Medtronic, Thermo Fisher Scientific.
- **Core Talent Pools-** Clinical Investigation, Clinical Operations, QA, Validation, Medical Devices Engineering.

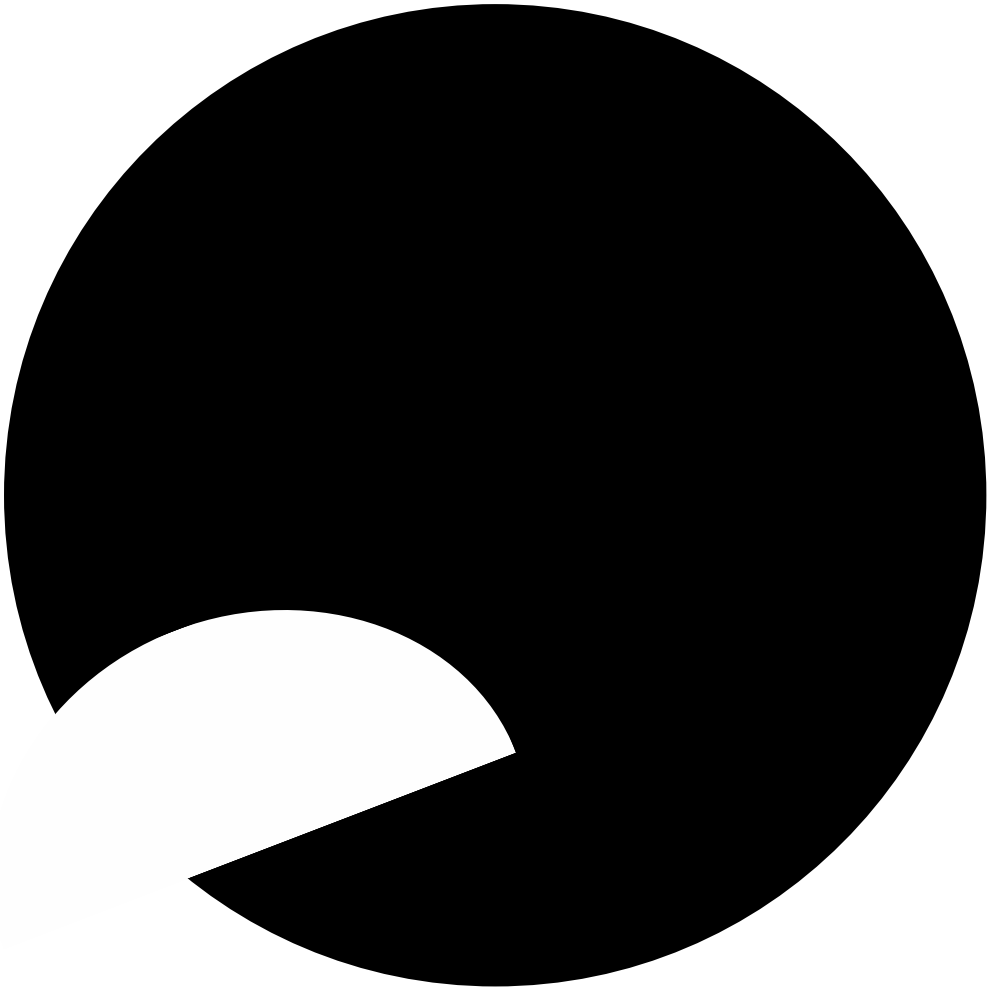
Chennai

7% (+3.1%)

- **Dominant Segments**-Healthcare IT, Revenue Cycle Management, Digital Operations
- **Key Players**-Cigna Healthcare, Optum, Philips, Baxter
- **Core Talent Pools**-Claims Processing, Health Informatics, RCM, Healthcare Analytics, Coding

Hiring Share (YOY growth)

While all major PHLS GCC hubs support multiple functions, each has developed a differentiated talent advantage, Hyderabad in Pharma R&D and regulatory functions, Bengaluru in Digital Health and AI, Pune in Clinical Operations and Medical Devices, and Mumbai in Commercial and Market Analytics.



Interested in exploring the complete report?

Connect with us at **askus@orcapod.work** to get the full report and gain access to more detailed insights.