



GBS Architectures: Data Book

February 2025

Market Report
Global Business Services



Our research offerings

This report is included in the following research program(s):

Global Business Services

- ▶ Advanced SciTech
- ▶ Amazon Web Services (AWS)
- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Asset and Wealth Management
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Contract Research Organization Services
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ CXM Technology
- ▶ Cybersecurity
- ▶ Cyber Threat Detection and Response
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Employer of Record (EOR)
- ▶ Engineering Research and Development
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies
- ▶ Finance and Accounting
- ▶ Financial Crime and Compliance
- ▶ Financial Services Technology (FinTech)
- ▶ Forces & Foresight
- ▶ GBS and Shared Services
- ▶ Google Cloud
- ▶ HealthTech
- ▶ Human Resources
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ IT Services Excellence
- ▶ IT Talent Excellence
- ▶ Lending and Mortgages
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Market Vista™
- ▶ Marketing and Interactive Experience
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Payment Integrity Solutions
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ ProcureTech
- ▶ Recruitment
- ▶ Retail and CPG
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)

If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

Learn more about
our custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk,
technologies

Locations: costs, skills, sustainability,
portfolios

Contents

4	Introduction and overview	20	Appendix
5	Background and context	21	Demographics
6	Research methodology	25	Glossary
7	Introduction to GBS architectures		
10	Snapshot of demographics		
12	Key findings		

For more information on this and other research published by Everest Group, please contact us:

Deborah Kops, Principal, Sourcing Change

Bharath M, Vice President

Meghna Thomas, Senior Analyst

Nebin Mathew, Analyst

Copyright © 2025 Everest Global, Inc.

We encourage you to share these materials internally in accordance with your license. Sharing these materials outside your organization in any form – electronic, written, or verbal – is prohibited unless you obtain the express, prior, and written consent of Everest Global, Inc. It is your organization's responsibility to maintain the confidentiality of these materials in accordance with your license of them.

Introduction and overview

Background and context

Research methodology

Introduction to GBS architectures

Snapshot of demographics

Background and context

ar·chi·tec·ture: a unifying or consistent form or structure; the manner in which components of a complex system are organized and integrated



Architecture is an apt term to describe the three core design dimensions of Global Business Services (GBS), what models they adopt, how they organize to align with enterprises, how they resource delivery, and, drilling down, what impacts these design decisions—factors such as enterprise revenue, industry, size, maturity, locations of headquarters, reporting lines, and power structure. In short, the underlying structural elements that determine how complex GBS entities are organized.

Why does understanding GBS architectures matter? GBS is highly contextual to the enterprises it serves, and there is no one-size-fits-all approach to design and implementation. Yet, as an industry, we constantly look at our peers to see what works—and what doesn't—in search of predictable patterns.

For the first time, Everest Group, in conjunction with Sourcing Change, set out to understand the state of play in GBS architectures to help the industry move from assumptions to facts. This report will enable readers to connect the dots between the models they adopt and how they align and resource. Specifically, this report answers the when, what, and how relative to questions such as:

1 Are models that “own” the delivery of processes the industry norm or are “landlording” or blended models being increasingly deployed—and when?

2 Are GBS organizations structurally orthodox, or are leaders aligning differently to drive GBS performance?

3 Are there patterns to GBS organizations' resourcing strategies?

Methodology



Earlier this year, we conducted in-depth interviews with leaders of over 50 GBS organizations to ascertain the key dimensions of GBS architectures against 10 vectors.

While we have discerned some notable trends, keep in mind **three caveats**:

Representative but not fully inclusive

Our research encompasses over 50 global companies, all of which operate multi-functional GBS operations.

Institutionalized GBS snapshot

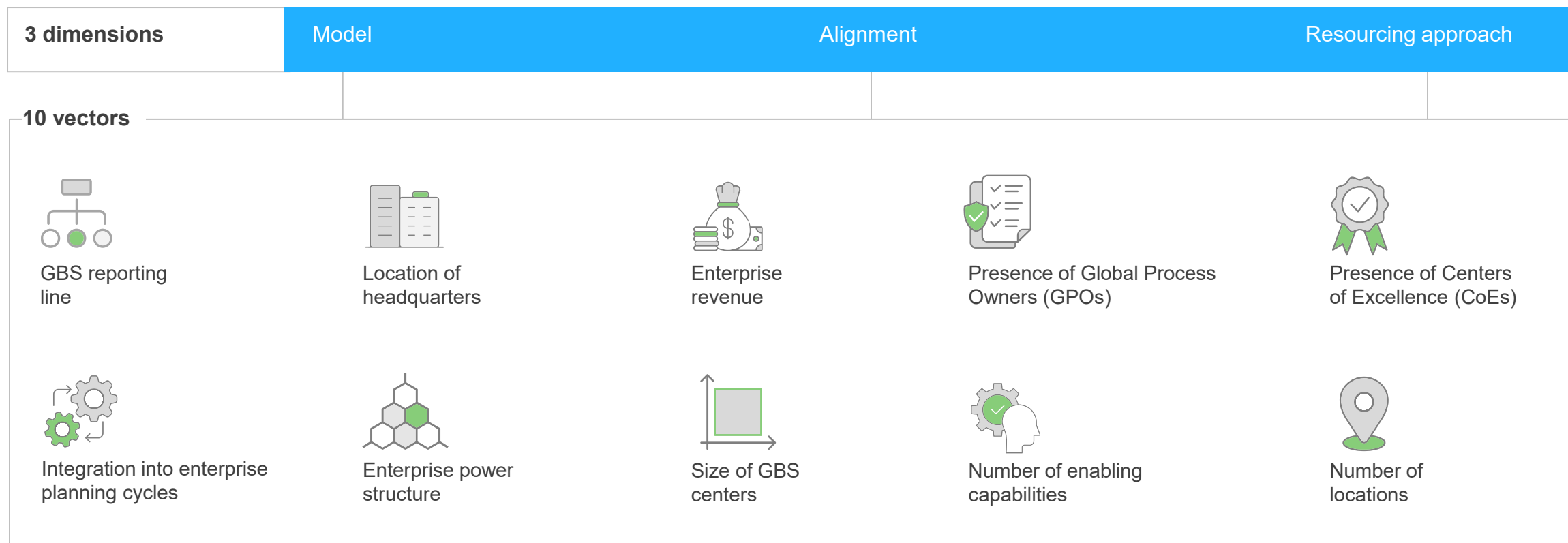
Participating GBS organizations are or are on their way to becoming fully institutionalized within their enterprises. The sample does not encompass GBS organizations that are currently being formed or rebooting.

Insights amid dynamic shifts

The research was conducted over nine months in 2024. Given the dynamism of business conditions and the model's agility, the underlying data driving our conclusions is subject to modification.

Introduction to GBS architectures – foundation of the analysis

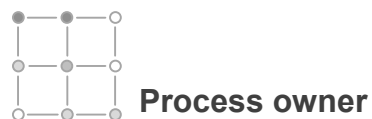
This report is based on an interview-based study with GBS leaders across industries. These interviews offered valuable insights into various aspects of GBS architectures across different organizations. We anchored our discussion on three dimensions and tested it against 10 vectors



Understanding GBS architectures (page 1 of 2)

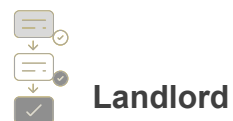
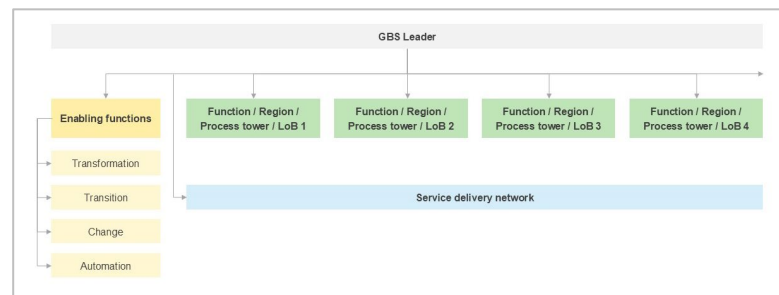
Before we start, it's critical to define the key dimensions that drive our analysis. Each of these models is detailed on pages 68-74 of the report.

1 Model



In this model, the GBS leader owns the output and is accountable for the design, standardization, and continuous improvement of activities within the GBS organization. Teams within the GBS setup (functionally, End to End or E2E, or regionally anchored) directly report into the GBS leader, with dotted-line reporting into enterprise counterparts.

Process owner model (please refer to page 70 for more details)



In the landlord model, the GBS leader hosts the teams (functionally, E2E, or regionally anchored) and provides infrastructure, technology, and enabling capabilities to the teams without owning the output.

Landlord model (please refer to page 68 for more details)



In this approach, the GBS center may have process ownership of some functions, processes, or regions and act as a landlord in others. This model allows the GBS organization to adapt its role based on each function's needs, balancing standardization with flexibility across the organization.

Understanding GBS architectures (page 2 of 2)

2 Alignment

Irrespective of the GBS model, GBS firms can be organized in the following ways:

- **Functionally anchored:** anchored on functions such as finance, procurement, HR, and SCM
- **Regionally anchored:** anchored on regions, for example, APAC, EMEA, and Americas
- **End-to-end (E2E) anchored:** anchored end-to-end of a particular capability, for example, R2R, P2P, and O2C
- **Line of Business (LoB) anchored:** aligned to a business, a product, or a brand
- **Variably anchored:** anchored such that it blends any of the above four alignments

3 Resourcing approach

The staffing strategies that GBS organizations adopt to deliver activities are:

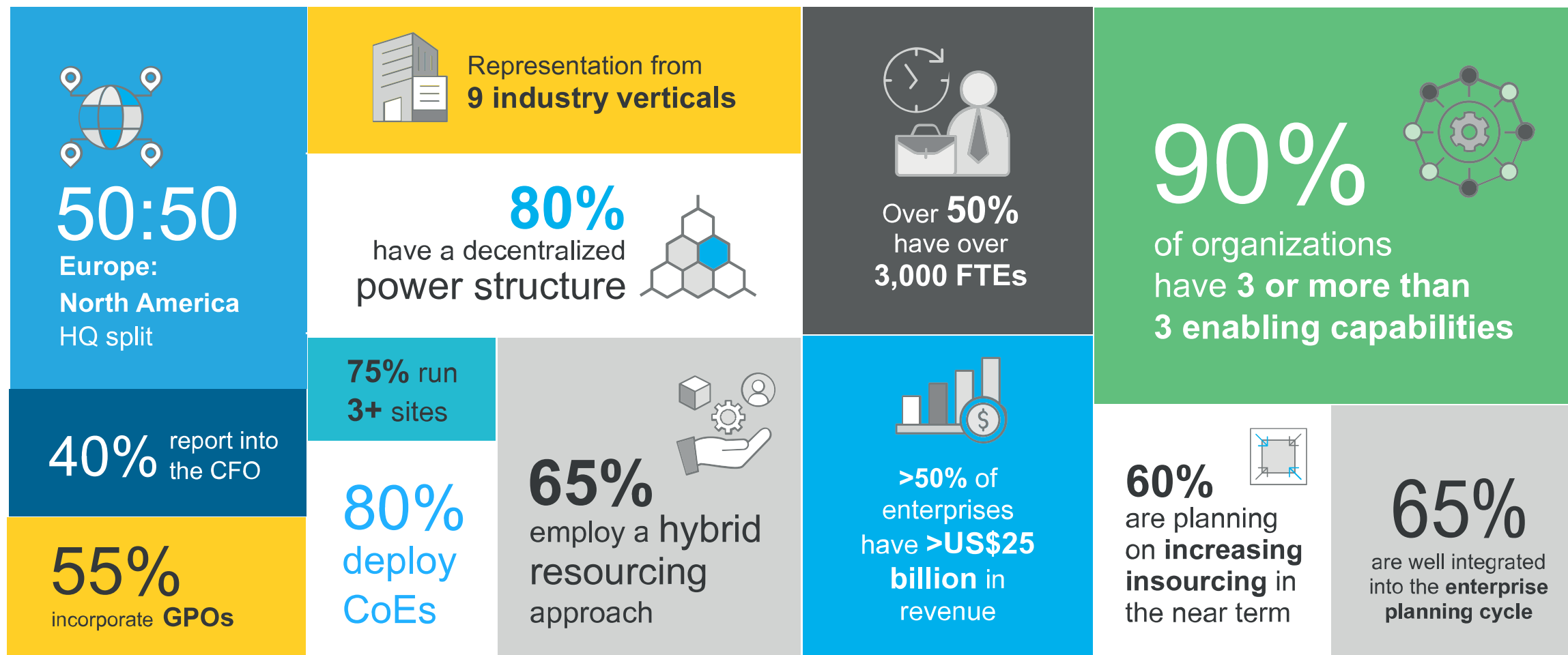
- **Predominantly in-house:** Enterprise employees deliver GBS activities
- **Hybrid resourcing:** Both enterprise employees and third-party providers deliver the activities
- **Fully outsourced:** The GBS organization entrusts third parties with the delivery of activities
(Note: None of the study participants adopt a fully outsourced resourcing strategy)

Demographics

Characteristics of GBS organizations

Study demographics

We ran interviews with 50+ GBS organizations



Note: Refer to pages 63-66 for a detailed overview of the demographics

Key findings

Functional alignment still leads the way



Landlording is more common than expected

49%

Process owner
model

30%

Landlord model

21%

Blended model

GBS is a derivative model, influenced by the context of the enterprise it serves

Hybrid sourcing models are here to stay

66%

Hybrid

30%

Predominantly in-house

Global process ownership is a work in progress



Reporting lines are shifting away from the CFO

**GBS alignment,
resourcing approach,
and reporting lines
show a correlation with
enterprise planning**

Appendix

Demographics

Glossary

Demographics of participants (page 1 of 4)

Distribution of GBS organizations by industry

2024; percentage
100% = ~50

BFS	6%
CPG	27%
HCLS	28%
Insurance	12%
Manufacturing	6%
TMT	4%
Resources	6%
Professional Services	6%
Others	5%

Distribution of GBS organizations by headquarters location

2024; percentage
100% = ~50

North America	47%
Europe	47%
Others	6%

Distribution of GBS organizations by enterprise revenue

2024; percentage
100% = 20-22

Less than US\$10 billion	29%
US\$10-25 billion	24%
US\$25-50 billion	29%
Greater than US\$50 billion	18%

Distribution of GBS organizations by GBS size

2024; percentage
100% = 20-22

Fewer than 999 FTEs	19%
1,000 – 2,999 FTEs	34%
3,000 – 4,999 FTEs	13%
5,000 or more FTEs	34%

Note: We have not covered any GBS organization that is fully outsourced
Source: GBS Architecture Study (2025)

Demographics of participants (page 2 of 4)

Distribution of GBS organizations by number of locations

2024; percentage

100% = ~50

1-2 locations	25%
3-5 locations	59%
More than 5 locations	16%

Distribution of GBS organizations by resourcing approach

2024; percentage

100% = ~50

Predominantly an in-house resourcing approach ¹	35%
Hybrid	65%

Distribution of GBS organizations by changes in the resourcing approach planned in the near term

2024; percentage

100% = ~50

Increase insourcing	55-60%
Increase outsourcing	5-10%
Retain same mix	35-40%

¹ Organizations that have more than 90% of their resources in-house
Source: GBS Architecture Study (2025)

Demographics of participants (page 3 of 4)

Distribution of GBS organizations by enterprise power structure

2024; percentage

100% = ~50

Centralized organizations	21%
Decentralized organizations ¹	79%

Distribution of GBS organizations by GBS reporting line

2024; percentage

100% = 20-22

Reporting into CFO	40%
Reporting into CIO/CTO	27%
Reporting into COO	17%
Reporting into other roles	16%

Distribution of GBS organizations by presence of CoEs

2024; percentage

100% = ~50

Has CoEs	78%
Has no CoE	22%

¹ Organizations with a power structure that is led by LoBs or functions, markets or regions, and/or products or brands, as well as organizations with a variable structure

Note: We have not covered any GBS organization that is fully outsourced

Source: GBS Architecture Study (2025)

Demographics of participants (page 4 of 4)

Distribution of GBS organizations by presence of GPOs

2024; percentage
100% = ~50

Has GPO	55%
Has no GPO	45%

Distribution of GBS organizations by integration into enterprise planning cycle

2024; percentage
100% = ~50

Well-integrated	64%
Not well-integrated	36%

Distribution of GBS organizations by number of enabling capabilities

2024; percentage
100% = ~50

2 or fewer	22%
3-5	43%
6-8	35%

Distribution of GBS organizations by enabling capabilities in GBS¹

2024; percentage
100% = ~50

Transition/Migration	58%
Program/Project management	58%
Automation	56%
Change management	56%
Process optimization	46%
Analytics	42%
Transformation	38%
Vendor management	28%
Other	26%

¹ A respondent may have more than 1 enabling capability
Source: GBS Architecture Study (2025)

Glossary of key terms used in this report

Center of Excellence (CoE)	A discreet team or entity that provides focused leadership, best practices, and research and development support for a business initiative or process. It is designed, funded, operated, and governed to eliminate inefficiencies and deliver additional value in a particular area. A CoE can be permanent or temporary	FTEs	Full-Time Employees
Enabling capabilities	Refer to the processes delivered within a GBS organization to support its service delivery or serve as a service provided to the enterprise. Some examples of enabling capabilities within a GBS include automation, transition/migration, and change management	Global Business Services (GBS)	An operating model for global services sourcing and management. It comprises in-house teams, outsourced teams, or a mix of both
Enterprise	Parent organization or entity. Enterprises set up and manage captives / GBS centers and outsourcing/third-party relationships	Global Process Owners (GPOs)	Individuals responsible and accountable for the end-to-end management and decision-making of a specific process across functional silos, business units, and geographic boundaries
Enterprise power structure	Refers to how the decision-making authority is distributed within an organization. In a centralized power structure, decisions are primarily driven by the executive board at the center. In a decentralized/federated power structure, the decision-making authority is delegated to leaders at regional, business unit, or product levels	Integration into enterprise planning cycles	Refers to the GBS organization's incorporation into the broader strategic planning of its parent entity

Research calendar

Global Business Services (GBS) and Shared Services

Published **Current release** Planned

Report title	Release date
GBS Cost Benchmarks Book	June 2023
Generative AI: Is This the Disruption GBS Model Needs or Just Another Over-Hyped Technology	August 2023
Learnings from Top GBS Employers™ – a Case Study Compendium	August 2023
Global Business Services (GBS) State of the Market 2023: Onward and Upward	September 2023
Global Business Services (GBS) Data Book 2023	November 2023
The Global Business Services (GBS) Landscape in the Consumer-Packaged Goods (CPG) / Retail Industry	November 2023
The Role of Global Business Services (GBS) in the Enterprise Sustainability Agenda: Current Adoption and the Path Ahead	November 2023
The Rise of Global Business Services (GBS) in the Life Sciences Industry	August 2024
Exploring the Potential of Generative AI in GBS: State of the Market and Path Ahead	September 2024
Global Business Services Rewards 2024: How Does Your Organization Stack Up?	September 2024
How Organizations Build Differentiated Employer Brand Perception	October 2024
Managing the Hybrid Offshore Resource Model: Navigating Evolution and Future Trends	December 2024
GBS Architecture: One Size Does Not Fit All	January 2025
GBS Architectures: Data Book	February 2025
Risk & Compliance (R&C) Services Delivery from Banking and Financial Services and Insurance GCCs in India	Q1 2025
“How-to” Guide to Quantify Value Delivered by GBS Organizations	Q1 2025

Note: [Click](#) to see a list of all of our published GBS membership reports



Discover the full research results.

Access the report:



Stay connected

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto
canada@everestgrp.com
+1-214-451-3000

Website
everestgrp.com

Blog
everestgrp.com/blog

Follow us on



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

Notice and disclaimers

Important information. Please review this notice carefully and in its entirety. Through your access, you agree to Everest Group's terms of use.

Everest Group's Terms of Use, available at www.everestgrp.com/terms-of-use/, is hereby incorporated by reference as if fully reproduced herein. Parts of these terms are pasted below for convenience; please refer to the link above for the full version of the Terms of Use.

Everest Group is not registered as an investment adviser or research analyst with the U.S. Securities and Exchange Commission, the Financial Industry Regulatory Authority (FINRA), or any state or foreign securities regulatory authority. For the avoidance of doubt, Everest Group is not providing any advice concerning securities as defined by the law or any regulatory entity or an analysis of equity securities as defined by the law or any regulatory entity.

All Everest Group Products and/or Services are for informational purposes only and are provided "as is" without any warranty of any kind. You understand and expressly agree that you assume the entire risk as to your use and any reliance upon any Product or Service. Everest Group is not a legal, tax, financial, or investment advisor, and nothing provided by Everest Group is legal, tax, financial, or investment advice. Nothing Everest Group provides is an offer to sell or a solicitation of an offer to purchase any securities or instruments from any entity. Nothing from Everest Group may be used or relied upon in evaluating the merits of any investment. Do not base any investment decisions, in whole or part, on anything provided by Everest Group.

Products and/or Services represent research opinions or viewpoints, not representations or statements of fact. Accessing, using, or receiving a grant of access to an Everest Group Product and/or Service does not constitute any recommendation by Everest Group that recipient (1) take any action or refrain from taking any action or (2) enter into a particular transaction. Nothing from Everest Group will be relied upon or interpreted as a promise or representation as to past, present, or future performance of a business or a market. The information contained in any Everest Group Product and/or Service is as of the date prepared, and Everest Group has no duty or obligation to update or revise the information or documentation. Everest Group may have obtained information that appears in its Products and/or Services from the parties mentioned therein, public sources, or third-party sources, including information related to financials, estimates, and/or forecasts. Everest Group has not audited such information and assumes no responsibility for independently verifying such information as Everest Group has relied on such information being complete and accurate in all respects. Note, companies mentioned in Products and/or Services may be customers of Everest Group or have interacted with Everest Group in some other way, including, without limitation, participating in Everest Group research activities.