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PwC India Moves From a Growth Market Story to an AI-enabled Execution Engine

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Trust, AI and impact shift from event themes to integral parts of the operating model

Two years after PwC India used its 2024 analyst event to emphasize India's strategic importance as a growth market, the firm has returned with a more mature, execution-oriented message. India is no longer simply a promising geography for PwC; it is becoming a core engine for AI-enabled consulting, technology transformation, managed services, global delivery, Global Capability Centers (GCCs), support and emerging-market expansion.

The 2026 event's tagline themes — trust, AI and impact — could have easily become broad consulting slogans. Instead, PwC India grounded them in client examples spanning cybersecurity, privacy, SAP, Oracle, data transformation, AI platforms, consumer growth, steel manufacturing, GCCs and public sector digital infrastructure. The result was a clearer view of how PwC India wants to compete: not by selling AI experiments or strategy road maps alone, but by combining technology partnerships, industry knowledge, delivery scale and outcome-focused accountability.

PwC India's 2026 story reflects a more ambitious role within the global PwC network. The firm continues to benefit from India's macroeconomic growth, client maturity, GCC expansion and technology talent base. But PwC India's leaders also described a more deliberate operating model built around global integration, AI-native delivery, upskilling, expansion into emerging markets, lower-cost delivery and a stronger managed services business. In TBR's view, PwC India is positioning itself as both a high-growth domestic consulting business and an increasingly important global transformation change catalyst for PwC.

PwC India's strategy is shifting from growth participation to capability leadership

PwC India Chair Sanjeev Krishan framed the broader opportunity in India around economic resilience, entrepreneurship, technology adoption, manufacturing growth, the importance of services and the need for trustworthy, inclusive progress. He also described PwC India's strategic priorities through the lens of PwC's Vision 2030 agenda. Five priorities stood out: upskilling PwC's people; becoming more AI-native; expanding into emerging Indian markets through the Kal Ka Bharat program; lowering delivery costs through AI and delivery industrialization; and investing more deeply in operate-led services. These priorities suggest PwC India is not merely adding AI to existing offerings but is rethinking talent, delivery economics, geographic reach and post-transformation operating models.

Advisory Leader Dinesh Arora expanded on that message, focusing on client concerns including geopolitical risk, AI uncertainty, cyber risk and the increased importance of trust. He highlighted that PwC India's approach emphasizes agility, speed, AI democratization, AI-enabled delivery, industry-specific AI solutions, startup collaboration and outcome-linked commercial models. The discussion about outcome-based pricing was particularly important. Arora indicated that more large proposals now include client questions about PwC's "skin in the game," and he suggested that outcome-linked work could become a much larger share of the business over the next few years, aligning with the broader direction of consulting where clients want measurable value, not simply transformation activities.

Arora also emphasized PwC's globally integrated consulting model, under which offerings, methodologies, tools and teams are increasingly shared across member firms. For PwC India, this matters in two ways. First, it gives India access to global credentials, methods and teams. Second, it positions India-based talent as a larger delivery base for global clients, particularly as remote and distributed consulting delivery becomes more accepted.

Palantir partnership gives PwC India (and potentially PwC as a whole) a sharper enterprise AI story

A panel discussion featuring PwC, Palantir and a joint insurance client was one of the most strategically significant sessions at the 2026 summit. It shifted PwC's AI story from a generic generative AI (GenAI) discussion to the more challenging enterprise realities of data integration, governance, traceability, sovereignty, observability and operating model change.

The client described Palantir Foundry as a long-standing strategic platform, initially used for analytics and increasingly central to AI adoption and data management. The client is moving from a central data warehouse to a more business-owned data integration model built on Palantir Foundry. The scale is significant: roughly 100 source systems and double-digit terabytes of data are being moved into a new operating environment.

The client highlighted PwC's data engineering, architecture and delivery expertise. PwC India's role is particularly relevant as the client has a major GCC presence in Bengaluru, allowing PwC India teams to work closely with the client's local and global stakeholders.

Further, Palantir executives emphasized the company's strategic relationship with PwC in key markets and described PwC as a partner that brings enterprise access, cultural fit, domain experience and engineering scale. Additionally, Palantir positioned India as a critical talent pool and force multiplier, especially as global clients seek to use GCCs as centers of transformation rather than support.

In TBR's view, the Palantir partnership gives PwC India a more differentiated narrative for its enterprise AI platform. Many consulting firms talk about AI strategy, AI governance and GenAI use cases. Few can combine a high-profile AI and data platform, global client transformation, regulated-industry trust requirements, and India-based engineering talent into a single story, especially when the message is amplified through a key technology partner. PwC's opportunity will be to turn this partnership from a select marquee engagement into a repeatable global growth engine as the firm relies on its dedicated Palantir Foundry team and leans on similar use cases where PwC provides GCC services to two to three other large global clients.

Client stories highlight PwC's evolving business plus technology operating and delivery model

During the event, PwC hosted 11 client use-case panel discussions. While each highlighted a key aspect of the firm's evolving value proposition, some really brought the story home.

A pharma client's SAP transformation was among the most compelling client stories as it demonstrated PwC's multidisciplinary model in a complex, global environment. The engagement began with business process redesign, industry best practices, global leadership alignment and a business blueprint, then moved into the technical blueprint and implementation. Several aspects stood out: The program covered 17 manufacturing sites across several geographies; PwC brought global pharma and life sciences expertise into local market workshops; the client pursued one global SAP template, with incremental adjustments for specific countries, businesses and regulatory requirements; and PwC's business process specialists worked alongside SAP implementation teams to ensure a smooth transition from process design to technology delivery. This case reinforced PwC's strength as a business integrator and system integrator and its ability to drive large SAP-led business transformation. For clients with complex multinational operations, this is the kind of integrated role PwC wants to own.

An India-native e-commerce client implementing Oracle Fusion offered a different but equally useful proof point. The client's finance transformation involved moving multiple businesses and acquired entities from disparate ERP environments into Oracle Fusion. The risk profile was also high. The client needed to migrate critical finance, payment and purchasing systems with limited fallback options. The timing added pressure because the go-live occurred shortly before India's festive season, when e-commerce volumes surge. The client emphasized change management as a major success factor. PwC helped identify impacted areas, prepare stakeholders, support training, and guide users through the shift from customized legacy ways of working to more standardized enterprise processes. In TBR's view, the e-commerce use case stood out because it showed PwC in a setting where execution risk was immediate and measurable. Unlike conceptual AI programs, ERP transformations of this scale expose weaknesses quickly. The client's description of three-shift workdays, relay-race execution and a no-fallback go-live underscored PwC's role as a delivery partner in business-critical transformation.

A panel discussion between a global engineering R&D services client, PwC and Google about the client's implementation of Google SecOps effectively connected PwC's trust and AI themes. The client moved from a legacy outsourced managed security services provider security operations model to an AI-led, automated and more forward-looking security operations center using Google SecOps, with PwC as the implementation and operations partner. The client chose PwC after evaluating multiple partners, including other large firms.

The client highlighted that PwC's key differentiators included the firm's experience with Google SecOps, its certified Google team, and prior client implementations. Gaining partners' trust by investing in the development of certified resources is a recurring theme in TBR's ongoing Ecosystem Intelligence research. This further confirms PwC's understanding of the importance of shifting from the usual vendor-agnostic message to a focus on becoming a preferred player in specialized sectors. Additionally, this use case supported PwC's broader argument that AI creates value when embedded in operating workflows. It also reinforced the trust theme: faster security operations yield not only efficiency gains but also improvements in risk and resilience.

A use case from an India-based pharmaceutical client provided one of the clearest examples of AI value being built on data discipline. Following a multiyear transformation journey — from establishing a cloud data lake to building more than 1,000 enterprise dashboards with strong governance and data quality — the client introduced an AI-powered conversational analytics platform. The solution, built in partnership with PwC, enables business users to interact with enterprise data in natural language, instantly generate insights, and accelerate decision making without relying on traditional dashboards or technical teams. PwC's AI-led data managed services role was notable. The client moved from a more transactional data engineering relationship with PwC to a managed services model centered on cross-functional teams, shared ownership, agile delivery discipline, AI in the software development lifecycle, and productivity improvements.

The company cited that it had already achieved a 15% productivity gain, with a longer-term goal of 30% and, eventually, higher productivity improvements. This use case aligned closely with PwC's central summit message: AI value does not come from pilots alone. It requires governed data, process ownership, shared incentives, productivity discipline and operating model change. We also believe that use cases like this one will help PwC test its ability to drive outcome-based pricing at scale, as productivity gains remain a focal outcome objective for clients.

A session with a multinational technology provider in the travel industry highlighted how India-based GCCs are transforming from mere cost centers into global value centers, owning not just execution but strategic decision making for their parent organizations. The client story aligned with PwC India's own GCC positioning. PwC is positioning itself to serve global companies both at clients' headquarters and at PwC's India-based GCCs, using its network model and India's talent depth to connect strategy, engineering, transformation and operations under one coherent offering. The earlier use case with the insurance client and Palantir echoed this point: India GCCs are no longer just client organizations to be advised from the outside; they are co-innovation partners, with PwC India embedding itself as a strategic architect of that transformation.

AI Labs move PwC India's AI story from presentation to productized go-to-market

A notable addition to PwC India's 2026 Analyst Summit was a GenAI pop-up lab that shifted part of the event from client storytelling to hands-on demonstrations. The lab showed how PwC India is working to translate its AI positioning into a more tangible portfolio of assets, accelerators, solutions that have delivered value to customers, and repeatable use cases aligned with CXO priorities: revenue enhancement, cost optimization and risk reduction.

PwC framed the AI lab around the layers where enterprise clients can most directly influence outcomes: platform orchestration, models, data and knowledge, agents and applications. Rather than focusing on foundational compute or model development — areas dominated by hyperscalers, chipmakers and governments — PwC emphasized the enterprise-facing layer where clients need orchestration, process integration, data unlock, domain context and governance. We see the framing aligning with PwC's broader strategy to position itself as the integrator of AI into enterprise workflows.

The lab demonstrations also reinforced a key message from the summit. PwC India's AI strategy is not limited to advisory or proof-of-concept work. The firm is building use-case-specific solutions that can be shown, adapted and commercialized across sectors. PwC's AI lab highlighted use cases including an agentic procurement suite; an AI-enabled Social Registry platform for the government of Assam; a multi-agentic AI project management twin; an agentic e-commerce solution; and a Palantir-enabled procurement and sourcing offering.

The lab's session structure was important as PwC did not present the assets as disconnected demos. They were mapped to business priorities and to a maturity stack, AI factories and data centers, platforms and orchestration, models and weights, data and knowledge, agents and apps. That structure gave the lab more strategic relevance than a conventional technology showcase.

In TBR's view, the AI lab served three purposes. First, it made PwC India's AI capabilities more concrete. Throughout the summit, PwC leaders noted that clients want AI to improve revenue, reduce cost and manage risk. The lab gave tangible examples of how PwC intends to meet those needs through repeatable assets focused on delivering business value with AI at the center rather than bespoke consulting alone. Second, the lab supported PwC's broader move toward asset-based and lower-cost delivery. Several PwC leaders discussed the need to reduce delivery costs using AI, institutionalized delivery and reusable tools. The lab demonstrated how PwC India is packaging domain expertise into repeatable AI-enabled solutions that can accelerate client work and potentially improve margins. Third, the lab strengthened PwC India's go-to-market credibility with enterprise buyers by aligning demos with recognizable business problems. Such positioning can help PwC address key pain points in scaling AI adoption as clients increasingly want AI solutions that integrate directly with business processes, rather than generalized AI experimentation.

PwC India is making a credible case for scaled AI delivery, but proof must remain outcome-led

PwC India is increasingly playing a more consequential role within PwC's global consulting network as the firm is being positioned — and increasingly tested — as a platform for AI-enabled delivery, global client execution, alliance-led transformation and outcome-accountable commercial models. PwC India's 2026 event showcased a stronger, more coherent model than in 2024: trusted relationships, India-based delivery depth, global integration, AI-asset-based delivery and commercialization and partner-enabled platforms.

The challenge is that every major professional services firm is pursuing similar themes. PwC India's differentiation will depend on whether it can turn client-specific success stories into repeatable offerings without weakening the local intimacy, senior partner involvement and execution discipline clients and partners praised throughout the event. The firm's opportunity is substantial; so is the operating complexity it is choosing to absorb.

Note: The following company mentioned in this special report is publicly traded: Palantir (Nasdaq: PLTR).