Confederation of Indian Industry

Leapfrog 2032: The road to 200 GCCs in Coimbatore

September 2026

The better the question.
The better the answer.
The better the world works.

Shape the future
with confidence

Foreword

It gives me immense pleasure to present this report on the evolving Global Capability Center (GCC) ecosystem in Coimbatore.

Coimbatore has always been defined by its ability to build strong and diverse industrial ecosystems. From engineering and manufacturing to textiles, pumps and motors, IT, healthcare and several emerging sectors, the city has demonstrated that sustainable growth is built on a combination of enterprise, talent, adaptability and a strong business community. This resilience has enabled Coimbatore to continuously evolve with changing economic opportunities.

CII Coimbatore was among the early adopters in recognizing the emerging GCC opportunity and its potential to add a new dimension to the city's economic landscape. With this understanding, the CII Coimbatore GCC Taskforce was constituted last year, leading to the inaugural GCC Coimbatore Summit. The continued momentum since then, along with the steady increase in GCC presence, clearly indicates the growing relevance of Coimbatore in India's evolving GCC landscape.

As this sector expands, it is important to move beyond tracking numbers and understand what will enable the ecosystem to scale sustainably. Global enterprises look for a combination of talent, infrastructure, connectivity, quality of life, innovation capabilities, institutional support and a conducive business environment. Coimbatore has several of these foundations in place. The opportunity before us is to strengthen them in a coordinated manner and create an environment that can support the next generation of global businesses.

This report is an effort to bring that perspective together. It documents Coimbatore's existing capabilities while identifying the areas that require greater focus as the city moves forward. A city with ambition needs not only to recognize its strengths but also to have a clear vision of what it seeks to become. In this regard, the report provides both a snapshot of where Coimbatore stands today and a direction for the journey ahead.

The GCC opportunity also aligns closely with the larger vision of Coimbatore NXT, CII Coimbatore's initiative focused on growth, visibility and advocacy. While our efforts continue to strengthen existing industries, the GCC initiative contributes to positioning Coimbatore as a destination for new-age industries and global enterprises, enhancing the city's visibility on the world stage.

I congratulate the CII Coimbatore GCC Taskforce and the EY team for undertaking this important study and bringing together valuable insights into an emerging area of Coimbatore's economic transformation. I am confident that this report will serve as a useful reference for industry, investors, policymakers, academia and other stakeholders in shaping the next phase of the city's development.

Coimbatore has always moved forward with the spirit of enterprise and resilience. The GCC journey presents an opportunity to carry that legacy into a new era of global growth.

V Noushad,

Chairman CII Coimbatore Zone,
Managing Director, Walkaroo
International Pvt Ltd

Foreword

India's Global Capability Center (GCC) landscape is entering a new phase. As enterprises seek greater resilience, specialized talent and room to scale, growth is increasingly extending beyond traditional metropolitan hubs.

This presents a significant opportunity for Coimbatore. Built on strong industrial foundations, deep engineering expertise, a vibrant academic ecosystem and a growing technology base, the city is well positioned to participate in the next wave of GCC growth.

This report is rooted in a simple belief: Coimbatore's opportunity is not merely to become another GCC destination, but to build a distinctive, scalable and future-ready GCC ecosystem.

At the heart of this report is the 5R growth framework: resilience, replicate, regionalize, role-led and ramp-up. Together, these growth engines bring multiple dimensions of GCC growth into a single strategy, spanning resilience-led expansion, industry clustering, regional enterprise participation, capability specialization and GCC scale-up.

Coimbatore can aspire to scale up from an industry of 75 GCCs today to its ambition to achieve 200 by 2032 through a credible roadmap paved by these growth engines.

Realizing this ambition will require coordinated action across industry, government, academia and the broader ecosystem. The Leapfrog 2032 agenda provides a practical blueprint to convert this opportunity into investments, capabilities and long-term economic value.

With focus, commitment and collective execution, Coimbatore can establish itself as one of India's most compelling next-generation GCC destinations.

Manoj Marwah,

Partner and GCC Markets Leader,

EY India

Contents

Introduction

Coimbatore's GCC opportunity is no longer about proving its potential. This city has already established the foundations of a credible GCC ecosystem, built on engineering talent, industrial expertise and a growing technology workforce. The challenge now lies in scaling.

Leapfrog 2032 is about one key question: How will growth be delivered?

To answer the first question, the report introduces the **5R growth framework** comprising five complementary growth pathways: **resilience, replicate, regionalize, role-led and ramp-up.** Together, these pathways identify new sources of GCC creation, expansion and capability development.

To answer the second question, the report proposes the GCC 200 delivery system, outlining the governance mechanisms, ecosystem partnerships and execution priorities required to translate ambition into outcomes.

Ultimately, the objective is not only to increase the number of GCCs operating in the city but also to deepen the scale, sophistication and strategic relevance of the work delivered from Coimbatore. The chapters that follow outline how that ambition can be achieved with the active participation of all stakeholders, including policymakers, industry bodies, enterprises, technology providers and talent ecosystem.

CHAPTER 1

Coimbatore at a glance

1.1

Coimbatore's industrial heritage and evolution

Coimbatore's emergence as a GCC destination is rooted in a century-long legacy of industrialization and engineering excellence. The city's growth began with textiles before expanding into pumps, motors, machine tools, precision engineering, automotive components and industrial manufacturing, earning it a reputation as one of India's leading engineering centers.

Over time, this industrial foundation created deep technical expertise, strong supplier networks and a culture of innovation supported by close collaboration between industry and academia. Today, Coimbatore combines engineering depth with a growing technology workforce, enabling organizations to establish GCCs across engineering services, digital technologies, product development and global operations.

1.2

Coimbatore in numbers

A city of 3.8 million residents, supported by over 300,000 (as per Coimbatore Rising: Zinnov CII 2025 Report) technology workforce, over 75 GCCs and one of India's strongest engineering and manufacturing ecosystems, Coimbatore is emerging as a leading destination for GCCs across domains.

~247 sq. km

Second largest city in Tamil Nadu

84%

Literacy rate

3.8 million[1]

Total population

58.22%[2]

Share of working population

75[3]

Number of GCCs

1.3

The case for Coimbatore now

Coimbatore is increasingly attracting GCC investments because it combines engineering talent, industrial expertise and cost competitiveness within a scalable operating environment.

Talent and engineering depth

Coimbatore has evolved from a textile and precision manufacturing center into a strong engineering and technology hub. Its strength lies in the close collaboration between academia, industry and startups, creating a steady pipeline of industry-ready talent.[4] Also, supported by high literacy levels and a robust educational ecosystem, it offers GCCs access to a deep and sustainable talent pool.

Workforce stability and cost advantage

Coimbatore's quality-of-life advantage is strategically relevant because it supports workforce stability and long-term career retention. More manageable commutes, comparatively affordable housing, access to strong social infrastructure and proximity to the Western Ghats strengthen the city's appeal to professionals who want meaningful careers without the operating pressures of a large metro. For GCCs, this advantage can be translated into lower attrition, stronger return-to-city hiring and a more durable leadership pipeline, rather than presented as a standalone lifestyle claim.

Among other Tier 2 cities, Coimbatore clearly stands out, and as the Tier 1 cities become over-saturated, Coimbatore is ready to expand from an overflow absorption hub to a greenfield location for new GCCs.

Policy, innovation and ecosystem readiness

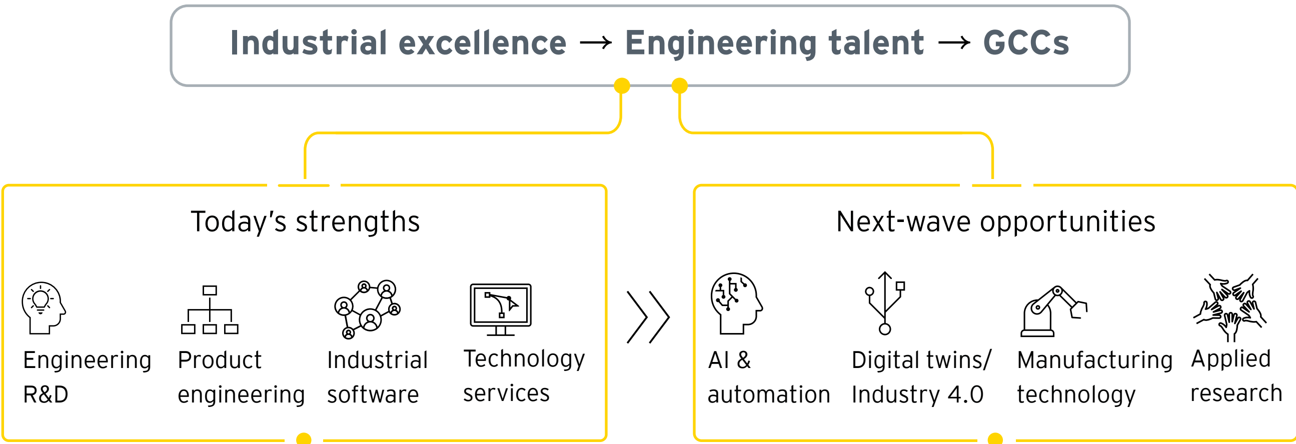
Policy
Tamil Nadu has emerged as a leader in GCC policy support, becoming the first Indian state to introduce a dedicated payroll-linked incentive scheme for GCCs. Announced in the 2024-25 Budget and operationalized in April 2025, the program aims to attract 50 GCCs by 2027. The initiative is complemented by the Tamil Nadu R&D Policy 2022, which supports innovation clusters, research infrastructure and centers of excellence (CoEs). The state has also identified Coimbatore as one of its priority GCC destinations, expanding opportunities beyond Chennai and fostering the growth of new technology hubs.

[1] https://worldpopulationreview.com/cities/india/coimbatore

[2] https://www.indiastatpublications.com/District_Factbook/Tamil_Nadu/Coimbatore

[3] CII

[4] https://gccnews.info/coimbatore-the-engineering-backbone-powering-indias-next-wave-of-gccs/



Ecosystem and infrastructure
Coimbatore is also strengthening its business and liability proposition through investments in transport, urban renewal and sustainability. In addition to improving regional connectivity, mobility and environmental resilience, the ongoing initiatives support the city's long-term growth ambitions. Urban enhancement programs have focused on waterbody restoration, flood management, groundwater recharge and sustainable mobility. At the same time, renewable energy initiatives are contributing to a greener urban ecosystem. While progress is evident, traffic congestion and execution challenges remain key areas for continued attention.

Coimbatore NXT
Launched by CII Coimbatore in 2022, is a strategic initiative focused on shaping the long-term economic growth and global positioning of Coimbatore with eight major industrial associations participating as part of this initiative. It aims to enable business expansion, position Coimbatore nationally and globally and represent industry priorities while working with government and other stakeholders on policies.

Innovation
The state has introduced innovation engines like SNS iHub (SNS iNNovation-Hub), which is India's largest nonprofit startup campus and aims to incubate 1,000 startups over a decade. It brings together entrepreneurs, researchers, students, industry leaders and investors to accelerate innovation and commercialization.

By integrating policy, infrastructure, innovation and academia, Coimbatore has strengthened its foothold and is ready for the next big leap in the GCC race.

Strategic takeaway: Coimbatore's combination of engineering depth, scalable talent, workforce stability and innovation potential positions it as a differentiated destination for high-value global capabilities.

Especially for mid-sized enterprises that do not require the scale of a mega GCC location, Coimbatore provides a compelling "right-sized" ecosystem where organizations can establish high-value global capabilities, achieve operational resilience, and access quality talent in a cost-effective environment.

1.4

Constraints that could slow down the scale

While Coimbatore's fundamentals are strong, sustained GCC growth may require addressing some ecosystem and scale-related constraints.

Strategic implication

Coimbatore has the foundations to compete: strong engineering talent, industrial strength and a supportive ecosystem comprising policy support, specialized SMEs, academic institutions, start-ups, high-grade office infrastructure, competitive operating costs. Translating these advantages into larger scale and realizing the GCC 200 ambition would require a focused growth strategy that builds on these strengths while addressing the constraints outlined above.

The next question, therefore, is not whether Coimbatore can participate in GCC growth, but where its next wave of GCCs will come from. The following chapter introduces five growth pathways that together provide a blueprint for scaling the city's GCC ecosystem from 75 centers today to 200 by 2032.

Risk category	Evidence marker	Implications for Coimbatore
Global connectivity risk	Limited direct international routes	With international connections to Singapore, Sharjah, Colombo and Kuala Lumpur, access to major GCC headquarters in North America and Europe generally requires a connection through another hub.[5]
Senior and specialist talent risk	A narrower leadership market than established GCC cities	Although 50% of Coimbatore's 300,000 strong IT/ITES workforce comprises mid to senior level talent, specialist senior talent for areas such as advanced AI, cybersecurity, risk, treasury and technology regulation is limited.[6]
Scale and ecosystem-depth risk	75 GCC firms, compared with the much deeper ecosystems of established metros	As an emerging GCC location, Coimbatore does not yet offer the same depth of GCC-focused recruiters, specialist advisers, peer networks, technology vendors and experienced functional leaders compared to established locations.
Commercial real-estate scalability risk	8 million sq.ft. to 10 million sq.ft of office stock; 0.15 million sq. ft. of new supply in H1 2025	Limited Grade A office facilities and a rapid increase in GCC demand could tighten the availability of large, contiguous, secure and digitally resilient campuses.[7]
Urban mobility and growth-management risk	Infrastructure modernization remains part of the city's forward development agenda	As employment expands along technology and suburban corridors, road capacity, public transport, employee transport and last-mile connectivity will need to keep pace. Lack of coordinated planning could lead to gradual loss of the current commute and quality-of-life advantage.[8]
Perception and positioning risk	Still widely associated with textiles, manufacturing and engineering	Precision manufacturing, industrial engineering, specialized SMEs and digital capabilities are Coimbatore's biggest differentiators, yet the city continues to retain a market proposition of either a traditional manufacturing center or as a lower-cost alternative to Chennai and Bengaluru.
Mandate-diversification risk	60% of existing centers focused on engineering R&D	While the city can retain its engineering-led identity with a focus on software, engineering and analytics, it must also demonstrate the ability to support adjacent global functions.[9]

[5]GCC Setup in Coimbatore 2026: Cost, Connectivity, Incentives, Talent | Pithonix
[6]www.zinnov.com
[7]www.cbre.com
[8]https://www.credaicoimbatore.com/admin/resource/uploads/srcimg/jll.pdf
[9]EY analysis

CHAPTER 2

GCC 200: the 5R growth framework

The ambition of scaling from 75 to 200 GCCs requires a structured framework. In this report, we propose **the 5R framework a five-pillar pathway for Coimbatore's GCC ecosystem.** The five pillars are: resilience-led expansion; replication through industry peers; regional enterprise GCC creation; role-led specialization; and ramp up existing GCCs.

In this chapter, we look at the role of each pillar in furthering the ambition of 200 GCCs in Coimbatore.

Resilience: Metro+1 mandates

1. Position Coimbatore as a preferred destination for business continuity, operational resilience, and distributed delivery models as enterprises seek to reduce concentration risk across major GCC hubs
2. Growth source: enterprises setting up a second GCC location to strengthen operational resilience and reduce concentration risk

Regionalize: Create the next generation of South Indian GCCs

1. Enable large South Indian enterprises to establish internal capability centers and formalize captive operating models.
2. Growth source: regional champions becoming GCC creators

Replicate: Follow proven success stories

1. Leverage the presence of peer companies in automotive, industrial engineering and energy and others to attract their competitors, suppliers and ecosystem peers.
2. Growth source: industry-cluster expansion

Role-led: Compete on competencies, not just cost

1. Build Coimbatore's reputation around engineering, industrial R&D, embedded systems, manufacturing technology, product development and applied AI.
2. Growth source: higher-value mandates and centers of excellence

Ramp-up: Scale existing GCCs for disproportionate impact

1. Support existing GCCs in expanding headcount, broadening functional scope and moving into higher-value work.
2. Growth source: larger centers, deeper mandates and greater economic impact

2.1

Resilience: Winning Metro+1 expansion mandates

A growing number of organizations are reassessing their location strategies to build greater resilience and agility across global operations. India's GCC landscape has historically been anchored around a select group of metropolitan centers. Bengaluru, Chennai, Hyderabad and Pune have emerged as the primary destinations for engineering, technology, product development, shared services and enterprise operations. These cities offer organizations the ability to create large-scale capability centers and innovation ecosystems that serve global businesses across functions and industries.

A growing trend is emerging in which MNCs are expanding into Tier II hubs as part of a resilience strategy or to establish centers of excellence (CoEs) and specialized centers, a model increasingly referred to as the Metro+1 policy.

While this concentration has delivered scale and operating efficiency, it has also created a growing dependence on a few cities. As GCC footprints continue to expand, enterprises are increasingly recognizing that future growth cannot rely solely on existing metro locations. The next phase of expansion will require a more distributed operating model that balances scale with resilience.

The enterprise resilience imperative

Rather than establishing entirely new GCCs in India, many enterprises are evaluating secondary locations that complement existing metro-based operations.

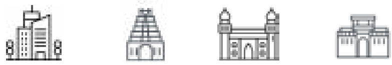
This shift is driven by several structural considerations:

- Business continuity requirements: organizations seeking operational redundancy and reduced dependency on a single location
- Talent diversification and access: enabling enterprises to tap into new talent pools beyond heavily concentrated metro markets
- Reduction in location-concentration risk: particularly for mission-critical engineering, technology and operations functions

1

Large GCC hubs today

High concentration of GCC operations across a few Indian metros



Bengaluru Chennai Hyderabad Pune

- Large engineering centers
- Technology and product-development hubs
- Shared services and operations centers
- Innovation and capability centers

Increasing concentration risk and business-continuity vulnerability.

2

Enterprise resilience imperative

Building resilience and agility through operating model rebalancing

- Business continuity requirements
- Reduce workforce and site risks
- Lower location-concentration risk
- Capacity for future growth
- Distributed operating models

3

Coimbatore: The Metro+1 destination

The preferred second hub for engineering, technology and operations functions

- Engineering resilience center
- Secondary GCC location
- Business continuity hub
- Distributed delivery center
- Future scale location

1 Strong engineering talent base

2 Lower operating costs

3 Proximity to Bengaluru and Chennai

4 Established industrial ecosystem

- Capacity for future growth: allowing organizations to scale capabilities without encountering the talent and cost pressures associated with established hubs
- Distributed operating models: enabling work to be delivered through interconnected networks of centers rather than a single location
- These factors are accelerating the adoption of Metro+1 strategy, wherein enterprises establish secondary sites to strengthen resilience, improve talent access and create long-term scalability

Coimbatore: The Metro+1 destination

Coimbatore is well-positioned to emerge as a preferred Metro+1 destination for enterprises seeking to expand beyond India's traditional GCC hubs. The city offers four structural advantages:

- Strong engineering talent base: supported by a deep academia and industrial ecosystem
- Competitive operating costs: relative to major GCC metros
- Proximity to Bengaluru and Chennai: enabling seamless integration with existing GCC leadership and operating structures
- Established industrial ecosystem: spanning manufacturing, engineering, mobility and industrial technology sectors

These strengths enable Coimbatore to support multiple operating models, including:

- An engineering resilience center that distributes critical engineering and product-development workloads
- A secondary GCC location complementing existing metro-based centers
- A business continuity hub providing operational redundancy and risk mitigation
- A distributed delivery center supporting multi-location operating models
- A future scale location that accommodates long-term growth and capability expansion

Rather than competing directly with larger metros, Coimbatore can complement them by serving as a strategic second hub for engineering, technology and innovation-led operations.

To capitalize on the Metro+1 opportunity, Coimbatore can:

- Build a target universe of enterprises already operating as large GCCs in Bengaluru, Chennai, Hyderabad and Pune
- Develop a focused Metro+1 value proposition centered on resilience, talent diversification and long-term scalability

The following table enlists examples of prominent GCCs across various sectors currently operating from Coimbatore.

Sector	Illustrative enterprise archetypes
Industrial technology	▪ Swiss-based industrial automation company ▪ US-based industrial technology company ▪ US-based engineering and automation company ▪ US-based diversified technology manufacturer
Automotive and mobility	▪ Germany-based automotive technology company ▪ Ireland-headquartered mobility technology company ▪ US-based electric mobility company ▪ French-based automotive supplier
Healthcare and medtech	▪ US-based healthcare technology company ▪ Dutch-headquartered health technology company ▪ US-based medical device company; US-based healthcare equipment manufacturer ▪ Irish American medical technology company
Energy and electrification	▪ US-based power management company ▪ Japanese industrial technology company ▪ Japanese electrical equipment manufacturer
Manufacturing and technology	▪ US-based life sciences and diagnostics company ▪ US-based motion and control technology company ▪ US-based industrial manufacturing company

- Showcase successful GCCs already operating in the city as proof points for future investors
- Engage enterprise location strategy teams and GCC leaders through a structured investment promotion program

Illustrative Metro+1 expansion universe

The opportunity extends across sectors where enterprises already operate significant GCC footprints within India's major metropolitan centers and may increasingly evaluate secondary locations as part of their resilience strategy.

These organizations are among the most likely to pursue resilience-led expansion strategies as they scale existing GCC operations in India.

Strategic implication

Rather than first-time GCC entrants, Coimbatore's largest growth opportunity may come from enterprises that already operate large GCC footprints in India's major metros and seek greater resilience, talent diversification and future growth capacity.

Even a modest share of Metro+1 expansion mandates could create a substantial pipeline of new GCC establishments over the coming decade.

2.2

Replicate: Following proven success stories

As emerging GCC destinations compete for investment, enterprises seek proof of execution. While talent, cost and infrastructure are important aspects, the decision to establish a GCC also depends on evidence that similar organizations have successfully established and scaled operations in the location. From that standpoint, Coimbatore possesses a distinct advantage.

1

Proven operating model

Success of anchor GCCs validates Coimbatore as a credible destination

- Deep engineering talent pool
- Strong industrial and manufacturing base
- Competitive operating environment
- Talent retention and quality of life
- Well-connected to metros and ecosystem

2

Peer replication to drive clusters

Competitors, suppliers and partners are more likely to follow proven success

- Competitors: Companies in the same space seeking credible alternate locations
- Industry peers: Businesses with similar talent and technology needs
- Supplier: Global suppliers looking to co-locate with customers
- Technology partners: Product, platform and services firms expanding their footprint

Industry cluster creation

Stronger ecosystem, more mandates and higher scale

Several GCCs across engineering, industrial technology, energy, automotive and life sciences sectors have successfully demonstrated the city's ability to support high value global work. These organizations have effectively de-risked the location for future investors.

Existing GCCs are Coimbatore's strongest references

The first stage of ecosystem development is attracting anchor GCCs. The next stage is leveraging those anchors to attract additional investment.

Existing GCCs in Coimbatore have already validated:

- Engineering and product development capabilities
- Digital engineering and software expertise
- Industrial technology and automation skills
- Energy and process engineering functions
- Healthcare and life sciences capabilities

Every successful GCC reduces perceived location risk and strengthens confidence among future investors. For Coimbatore, potential investors may include:

This creates a natural replication cycle comprising anchor GCCs, market validation, peer expansion, ecosystem growth and industry clusters.

Coimbatore already has anchor GCCs and replication that can create scale across:

- Industrial technology
- Automotive and mobility
- Energy and electrification
- Healthcare and medtech
- Manufacturing technology

These sectors may provide the strongest foundation for future cluster-building and investment attraction.

A few actions can help Coimbatore accelerate replication-led growth:

- Identify competitors, suppliers and technology partners of existing GCCs
- Build sector-specific target lists around anchor companies
- Develop case studies that showcase successful GCC operations in the city
- Create industry-led investment campaigns focused on high-potential clusters
- Position Coimbatore as a specialized ecosystem rather than a generic GCC destination

Investor type	Why they follow
Competitors	Follow proven locations already validated by peers
Industry peers	Require similar talent pools and operating environments
Suppliers	Seek closer integration with major customers
Technology partners	Expand alongside growing industry ecosystems

Strategic implication

Coimbatore's existing GCC base validates the city as a viable destination for engineering, technology and innovation-led work. Therefore, the most effective investment attraction strategy can be built around proven success stories. The city can systematically target competitors, industry peers, suppliers and technology partners of existing GCCs. It can accelerate cluster creation and establish self-reinforcing growth engines for future investments.

2.3

Regionalize: Create the next generation of South-native GCCs

Coimbatore has an opportunity to create a new source of GCC growth by helping South-native enterprises establish dedicated **internal capability centers (ICC)**. Many South-native enterprises already have technology, engineering, analytics, product development and shared-services capabilities across multiple business units and locations. Coimbatore can help these organizations consolidate such capabilities into dedicated internal centers, with clear ownership, scale and long-term operating relevance.

For South-native enterprises, Coimbatore offers a combination of familiarity, talent access and operating

From regional champions to GCC creators

The next wave of GCC growth can come from enabling South Indian enterprises to establish internal capability centers and formalize captive operating models.

1

Regional enterprise base

South India-headquartered companies with scale and global ambition

- Automotive and mobility
- Industrials and engineering
- Healthcare and life sciences
- Consumer and retail
- Technology and digital enterprises
- Chemicals and materials

2

Consolidate enterprise capabilities

Bring together capabilities currently distributed across businesses or locations

- Technology and digital
- Engineering and R&D
- Data, AI and analytics
- Finance and shared services
- Product development

3

Establish in Coimbatore

Dedicated internal capability center

- Enterprise-wide mandate: Single point of ownership for key capabilities
- Concentrated talent base: Ability to consolidate technology, engineering and domain talent
- Common technology and platforms: Standardization, automation and productivity at scale
- Regional and global mandate: Ability to deliver for India and global operations

stability that can simplify center creation and scale-up.

The city's key advantages include:

- Access to engineering and digital talent
- Strong employee retention and workforce stability
- Proximity to industrial and academic ecosystems
- Competitive operating costs
- Attractive quality of life and shorter commute times
- The ability to build local leadership teams and long-term capability ownership

For many regional enterprises, Coimbatore can serve not as a satellite office, but as a primary capability center with meaningful decision-making authority and strategic importance.

To accelerate regional enterprise-led GCC creation, Coimbatore should:

- Identify high-potential South Indian enterprises with dispersed technology, engineering and shared-service functions
- Develop a dedicated value proposition for internal capability centers
- Support enterprises in defining capability ownership and operating models
- Build awareness around the benefits of center consolidation and specialization
- Create forums that connect regional enterprises with talent, academia and ecosystem partners

Strategic implication

Coimbatore should move beyond simply attracting GCCs and actively enable their creation. By helping South-native enterprises consolidate and scale technology, engineering and business-support capabilities into dedicated centers, the city can unlock an additional growth engine that is less dependent on global investment cycles.

2.4 Role-led: Win through competencies

Talent, infrastructure and cost competitiveness may attract initial investment, but long-term differentiation comes from capability leadership. The most successful GCC hubs are rarely known for doing everything. They become known for specific capabilities that are difficult to replicate and increasingly attract higher-value mandates.

For Coimbatore, the opportunity lies in building on its engineering heritage and industrial expertise to create a distinctive capability-led identity. The city's competitive advantage is anchored in its three structural strengths:

- Deep engineering and technical talent
- Strong industrial and manufacturing expertise
- A growing ecosystem spanning digital technologies, innovation and applied research

While Coimbatore should remain open to a broad range of GCC mandates, ecosystem investments should focus on capabilities where it possesses a natural advantage, particularly for engineering-led greenfield hubs for R&D-intensive businesses and global mid-market enterprises. The city's existing capabilities are aligned with its strengths in:

- Industrial engineering
- Product engineering
- Industrial software
- Smart manufacturing
- Automation and industrial IoT
- Engineering R&D

These strengths provide the foundation for capability specialization rather than generic GCC growth. Building the next set of capabilities can therefore evolve from its existing engineering base. Some of these include:

- Automotive software and electronics
- Digital twins and Industry 4.0
- AI-enabled engineering applications
- Manufacturing technology platforms
- Energy and sustainability engineering

Going beyond the current scope, Coimbatore is also well-positioned to participate in a number of emerging opportunities. It can consider a few long-term capability bets that can be developed as the ecosystem matures:

- Healthcare technology
- Medical device software
- Health analytics
- Applied AI research

As specialist capabilities mature, high-value GCC develop the ability to build and grow capable leadership and, as a consequence, high-value mandates naturally follow.

These include:

- Global engineering centers
- Research and development centers
- Centers of excellence
- Product and platform ownership teams
- Industrial innovation hubs

Progression is important for building recognized capabilities over time. To establish capability leadership, Coimbatore can take a few targeted actions:

- Focus ecosystem investments on a small number of priority capability domains
- Build industry-academia partnerships aligned to these domains
- Develop specialized talent programs and certification pathways
- Establish centers of excellence in priority sectors
- Position the city around capability strengths rather than generic location benefits

Strategic implication

Coimbatore should avoid competing as a general-purpose GCC destination. Instead, it should build a reputation around a small set of specialized engineering and innovation capabilities where it has a demonstrated right to win.

High-value GCC mandates that follow

Global engineering centers	End-to-end engineering and product development
Research and development centers	Advanced R&D, prototyping and new-product innovation
Global engineering centers	Specialized capabilities, best practices and global support
Product and platform ownership	From component to platform to product ownership
Industrial innovation hubs	AI, analytics, automation and next-generation technologies

Outcome

India's specialist hub for engineering-led global capabilities

- High-value mandates
- Stronger global relevance
- Sustainable competitive advantage
- Long-term ecosystem impact

2.5

Ramp-up: Scale existing GCCs for disproportionate impact

While attracting new GCCs remains important, leveraging the existing GCC base offers a more immediate opportunity to build scale. Many of today's centers are still in the early stages of their growth journey, creating significant opportunities to expand headcount, broaden mandates and increase strategic relevance. The same opportunity exists for Coimbatore's current GCC ecosystem.

Focus

Help every GCC climb the staircase through growth in scale, scope, value and mandate ownership.

Pilot/+1 location
- Small teams
- Initial mandate
- Execution-oriented work
- Local reporting

Focused team
- Defined capability
- Limited functions
- Established delivery
- Talent ramp-up
- Some process ownership

Specialist capability center
- Multiple capabilities
- High-value mandates
- Domain expertise
- Stronger governance
- Regional support

Center of excellence
- Multi-functional CoE
- Best-practice owner
- Advanced tools and IP
- Global support
- Leadership bench

Global hub
- Large scale
- Global mandate ownership
- Strategic decision-making
- Drives innovation
- Strong enterprise impact

The journey from presence to a strategic hub

Insights from GCC leaders consistently highlight that a city earns scale over time through credibility, capability development and mandate ownership. Therefore, center growth is rarely a single investment decision.

A typical GCC evolution journey follows five stages:

- Establish presence: small teams are created to support specific functions or projects
- Build capability depth: centers expand into additional functions and develop specialist expertise
- Earn larger mandates: global teams begin transferring broader responsibilities based on proven execution
- Develop local leadership: senior leaders take ownership of products, platforms, functions or regions
- Become a global hub: the center evolves from an execution location to a strategic decision-making hub

Each stage creates additional employment, deeper capabilities and greater strategic value for the city.

A GCC center that may have begun with a few hundred employees can evolve into a globally important capability hub with responsibilities far beyond its original mandate.

Coimbatore can help accelerate scale-up through following actions:

- Engage existing GCCs through structured growth dialogues
- Identify opportunities for mandate expansion and capability diversification
- Support creation of centers of excellence in priority capability areas
- Strengthen talent pipelines for leadership and specialist roles
- Facilitate industry-academia partnerships aligned with GCC expansion plans
- Track growth through mandate depth and capability ownership, not just headcount

Real journeys. Real scale.

Healthcare GCC

15 1,500+

From a 15-person pilot to a 1,500+ employee global delivery hub

AI-led supply chain GCC

New specialist capability

AI and customer-facing supply-chain capabilities

Industrial engineering GCC

Engineering support global CoE

Expansion in sight

Media and marketing GCC

Graduate training hub 380 people

Expanding its footprint

Global energy GCC

1,700+ people

Company's second-largest India GCC

Strategic implication

Operating GCCs provide a good view of what the first stage of GCC evolution looks like. Many of the world's leading GCCs began as small delivery centers before evolving into global hubs with responsibility for products, platforms and enterprise-wide capabilities. Coimbatore's opportunity is to help its existing GCCs follow the same journey.

CHAPTER 3

Leapfrog 2032:
GCC 200 delivery system

The 5R growth framework defines where growth will come from. The GCC 200 delivery system defines who will drive it and how it will be delivered.

Achieving the GCC 200 ambition will require coordinated action across industry, government, academia and ecosystem stakeholders. The GCC 200 delivery system provides the governance architecture required to convert ambition into execution.

What needs to happen	Who leads	How it gets done	Key outcomes	5R link
Establish a single governance structure	CII Coimbatore + GCC industry leaders + CODISSIA	Create the Coimbatore GCC Council to drive the GCC 200 agenda	One governance mechanism. One roadmap. One scorecard	All 5Rs
Build a qualified investment pipeline	Guidance Tamil Nadu + Tamil Nadu Industries Department + CII Coimbatore	Run a named-account strategy Target Metro+1, peers and regional enterprises	A qualified pipeline of GCC pursuits and expansions	Resilience, replicate and regionalize
Position Coimbatore globally	CII Coimbatore + Guidance Tamil Nadu + CODISSIA	Build a common market narrative Drive targeted global outreach	Stronger investor recall and differentiated positioning	Resilience, replicate and role-led
Create future-ready talent	TNSDC + academia + GCCs	Launch GCC talent and leadership Academy (priority skill tracks)	Reduced talent gaps and strong leadership pipeline	Role-led, ramp-up
Ensure infrastructure readiness	Government (SIPCOT + Tamil Nadu industries dept.) + CCMC+ real estate developers	Launch GCC-ready infrastructure mission Office space, mobility, connectivity, digital infrastructure	Faster GCC setup and expansion	Resilience, ramp-up
Build specialization clusters	GCCs + universities + innovation hubs	Create engineering and innovation clusters Focus on right-to-win capabilities	Stronger sector differentiation and innovation ecosystem	Replicate, role-led
Enable Metro+1 growth	Guidance Tamil Nadu + SIPCOT + CCMC	Target enterprises with large GCCs in Tier-I locations	Steady flow of India+1 and Metro+1 investments	Resilience
Enable regional champions	CODISSIA + CII + regional enterprises	Help regional enterprises establish capability centers	New category of GCC creation from within the region	Regionalize
Support GCC expansion	Guidance Tamil Nadu + CII Coimbatore + existing GCCs	Create GCC expansion program Support new mandates, leadership roles and CoEs	Larger centers, deeper mandates and more leadership roles	Ramp-up
Track outcomes and impact	CII Coimbatore + Guidance Tamil Nadu + CODISSIA	Track through a common city-level scorecard (KPIs)	Accountability, transparency and execution discipline	All 5Rs

The delivery system is built around five execution priorities:

1. Drive investment: build a structured pipeline of GCC opportunities aligned to the five growth pathways.
2. Develop talent: strengthen engineering, digital and specialist talent pipelines through deeper industry-academia collaboration.
3. Build capability clusters: focus on ecosystem development around priority sectors and competency domains.
4. Scale existing GCCs: support mandate expansion, leadership growth and capability diversification within existing centers.
5. Measure progress: track outcomes through investment, employment, capability depth and mandate ownership.

City development strategies often fail because ownership is fragmented. The GCC 200 agenda would require a small set of institutions with clearly defined responsibilities across investment attraction, ecosystem development, talent creation and industry engagement. The role of the delivery system is therefore not to create new initiatives, but to enable the existing stakeholders to work towards a common growth agenda.

By 2032, Coimbatore should be able to demonstrate not only an increase in the number of GCCs operating in the city, but also the confidence of global enterprises to entrust the city with products, platforms, engineering decisions and specialist outcomes. That is the shift from an emerging destination to a scaled capability hub.

Coimbatore's next phase of evolution could be based on a three-year roadmap which incorporates the role of institutional mechanisms, investment pipeline and talent ecosystem required to sustain long-term GCC growth. The roadmap follows three phases: mobilize, convert and scale.

	Mobilize **Build the machinery**	**Convert** **Turn pursuits into outcomes**	**Scale** **Create repeatable growth**
Governance	Establish the Coimbatore GCC Council and delivery office Define roles, processes and operating rhythm	Run quarterly portfolio reviews Resolve investor bottlenecks and enable faster decisions	Institutionalize governance model Publish annual GCC scorecard and impact report
Investment pipeline	Build a named-account list across the 5Rs Assign relationship owners and engagement plans	Convert priority accounts into visits, proposals, pilots and center launches Secure the first wave of expansion	Expand pipeline using success stories and peer referrals Drive expanded mandates and new logos
Talent	Identify priority roles and capability gaps Launch employer-backed skill programs	Build specialist cohorts and leadership pathways Align academia, GCCs and industry on demand	Scale programs and deepen specialist talent pool Strengthen senior talent and leadership pipeline
Infrastructure	Map GCC-ready office capacity, mobility and connectivity Identify and prioritize gaps	Package expansion-ready sites and resolve priority gaps Ensure plug-and-play readiness	Build capacity ahead of demand Enhance resilience, livability and international connectivity
Specialization and Innovation	Form industry-backed clusters in priority domains Create roadmaps for CoEs and innovation labs	Launch shared labs, pilots and applied research programs Showcase early proof points	Convert proof points into investor propositions Drive innovation-led mandate attraction
Existing GCCs (ramp-up)	Map current GCCs and their expansion ambitions Identify constraints and quick wins	Support new functions, leadership roles and centers of excellence Unlock additional mandates	Scale headcount and mandates Create anchor GCC with global ownership
Milestone	One council. One pipeline. One scorecard.	First wave of Conversions and Mandate expansions.	A repeatable GCC growth Engine.

Conclusion
the choice ahead

Coimbatore has established its credibility as an emerging GCC destination. While awareness continues to remain important, the next chapter of its journey will be defined by execution. As the city enters the next phase of growth, its structural advantages will make it stand apart: a strong engineering heritage, a deep talent base, a growing technology ecosystem and a differentiated position within India's evolving GCC landscape. As enterprises increasingly seek resilience, specialization and access to new talent markets, Coimbatore shall be well placed to benefit from the next wave of GCC expansion.

The 5R growth framework identifies a clear pathway to capitalize on the opportunity. The five complementary growth engines that can accelerate GCC creation, expansion and specialization. It also helps establish the governance, partnerships and execution mechanisms required to convert that ambition into measurable outcomes. However, apart from the number of GCCs, the ultimate measure of success would be the city's credibility. Success can become consequential when global enterprises trust Coimbatore with larger mandates, deeper engineering ownership, specialist capabilities and business-critical responsibilities. It could also be measured by the city's ability to develop globally relevant capabilities, nurture leadership talent and create institutions that sustain long-term growth. Coimbatore has an excellent foundation, growth pathways and an articulated delivery system for a GCC ecosystem.

Moving from potential to execution will require participation from industry and the government. If pursued collectively, Coimbatore can establish itself as one of India's most distinctive and globally relevant GCC destinations by 2032.

Leadership perspectives

Talent advantage

"One of Coimbatore's greatest strengths is its ability to attract talent. Professionals today are increasingly looking for a balance between career growth and quality of life, and Coimbatore offers both. That combination is creating a deeper and more diverse talent pool than many organizations may realize."

GCC Center Head, Coimbatore

Location strategy

"Coimbatore is probably the best-kept secret. The decision of whether Coimbatore is a core office or a +1, i.e., a complementary office, has a significant impact on deciding whether to have an office in the city. If a company is considering creating a core office in Coimbatore, the decision must be based on talent availability most of all. Coimbatore is a great choice for a +1 office for its distinct advantages. Being a Tier-II city puts Coimbatore in a good position. Good local talent can be closer to home, and the city has less pollution. However, the city must ramp up international connectivity which, at the moment, is a disadvantage."

GCC Center Head, Coimbatore

Building for scale

"There were two reasons for us to come to Coimbatore: the talent and the weather. However, getting a lateral hire into Coimbatore is a challenge. We bring in young engineers, put them through a proper training program and create the talent pool we need. Our preference is completely home-grown, not only for technical skills, but also for the cultural ethos people bring. We give employees the opportunity to aspire to senior leadership roles from within."

GCC Managing Director, Coimbatore

CHAPTER 4

Case studies

Case study 1: A US-based life sciences solution provider
From a transactional back office to a global strategic delivery center

Over 18 years, the Coimbatore center evolved from a 15-person back-office pilot into the company's largest global location with ~1,500 employees, demonstrating the city's ability to support increasingly complex, technology-enabled and higher-value global mandates.

01 Evolution journey

2007	2012	2015	2019	Today
P	3	2	1	G
15 HC	**300+** HC	**Tier-II** Center	**Tier-III** Strategic	**~1,500** HC
▪ Pilot Center	▪ Tier-III support center	▪ Broader functional ownership	▪ Enterprise-wide responsibilities	▪ Largest global location ~12% of workforce

Key milestones

2007	2012	2015	2019	Today
▪ 15-member pilot focused on transactional work	▪ 300+ employees; primarily back-office operations	▪ Tier-II status with expanded functional scope	▪ Tier-I strategic center status	▪ Largest global location in Coimbatore

02 Mandate evolution

THEN Transaction processing

- Back office support
- Administrative operations
- Labor intensive activities

Global reach | North America
Europe | Middle East | Africa
Asia

NOW Enterprise operations and digital capabilities

Business operations

- Customer and commercial operations
- Procurement
- Supply chain
- Sourcing
- Planning
- Export documentation

Finance

- Collections
- Payments
- Accounting
- Regulatory reporting

Technology and digital

- End-user services
- Network operations
- Cybersecurity
- ERP and CRM
- Application development
- Automation
- AI and data science

Life sciences

- Global clinical trial activities
- Scientific product requirements

Enterprise services

- E-commerce design
- Project management
- HR shared services

03 Why it succeeded

Success enablers

- Deep talent availability
- Strong academic ecosystem
- Cost competitiveness
- Leadership transformation and operating discipline
- Reverse migration improving access to selected specialist skills

Remaining challenges

- Advanced AI and digital skills
- European-language capabilities
- Curricula modernization for AI/ML

Strategic ambition | Position Coimbatore as a globally recognized center for AI-led supply chain expertise, customer-facing solutions and business value creation.

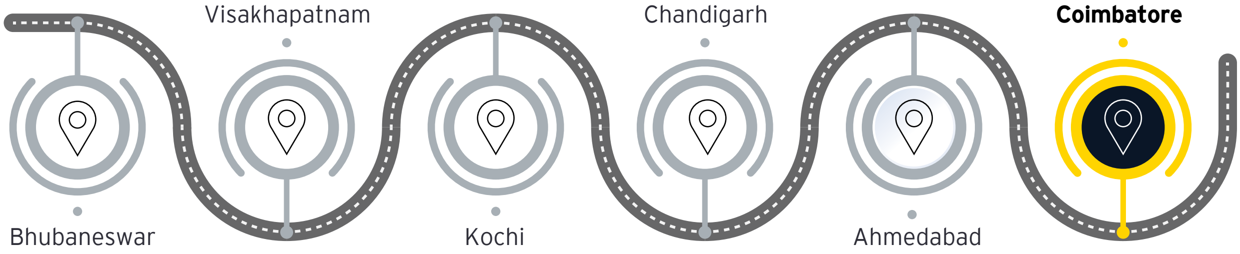
Case study 2: A US-based global supply chain software company
Building an AI-led Supply chain capability hub in Coimbatore

A leading US-based supply chain software and product company, whose solutions are used by 90% of the Fortune 500 companies

Selected Coimbatore over Bhubaneswar, Kochi, Ahmedabad, Visakhapatnam and Chandigarh to build AI-led supply chain capabilities

01 Why Coimbatore won

Location shortlist



Deciding factor: Talent

- High-quality engineering graduates
- Proximity to Bengaluru
- Strong 2-5 year experienced professional pool
- Learning agility and adaptability
- Academia-industry linkages
- Ecosystem support and partnerships

02 Capability building model

1 | Customer-facing experts

2 | Professional skills

3 | Process excellence

4 | Technology and AI skills

5 | Product and solution knowledge

6 | Supply chain domain expertise

Recruit → Onboard → Develop → **Deploy**

03 Why it succeeded

Success enablers

- Strong engineering talent
- Leadership transfer from Bengaluru
- Academic partnerships
- Rapid capability ramp-up
- Strong learning culture

Remaining challenges

- Academic-to-corporate skill gap
- Limited senior and niche talent
- Tier-II perception barriers
- Curriculum alignment needs

Strategic ambition | Position Coimbatore as a globally recognized center for AI-led supply chain expertise, customer-facing solutions and business value creation.

Case study 3: A French energy services and technology provider
From engineering services hub to a strategic energy GCC

Energy + digital
For this global energy company, Coimbatore has evolved into a strategic GCC location that supports both its traditional engineering strengths and its ongoing digital transformation journey.

1. **~1700+** employee
2. **20+** years in Coimbatore
3. **Second** largest India GCC after Pune

01 Why Coimbatore works

Engineering talent advantage

1. Strong mechanical engineering talent
2. Large fresher hiring base
3. ~10% annual workforce growth
4. Return-to-city talent pool
5. Industry-ready graduates from reputed institutions

Diverse talent sources

1. Engineering graduates
2. Experienced lateral hires
3. Returnee professionals
4. Bengaluru/Pune ecosystem connectivity

02 GCC journey in Coimbatore

Entry via acquisition
Established foundation in Coimbatore

Engineering services
Core engineering support and services

Engineering design
Scaled mechanical and design capabilities

Enterprise IT
Expanded IT delivery across the enterprise

Digital transformation
Enabled digital solutions and automation

OT cybersecurity and advanced capabilities
Specialized, high-value mandates

1700+ employees | Second-largest GCC in India after Pune

03 Success factors and challenges

Success enablers

- Deep engineering and domain expertise
- Strong talent availability and fresher pipeline
- High employee retention
- Cost-efficiency advantage
- Ability to scale into complex mandates

Remaining challenges

- Leadership talent is less abundant locally
- Dependence on Pune for leadership transfers
- Close coordination for shared teams and continuity
- GCC ecosystem still maturing

Strategic ambition | Coimbatore has evolved from a traditional engineering-services location into a strategic GCC destination supporting engineering excellence and enterprise digital transformation, offering scale, depth and long-term growth potential.

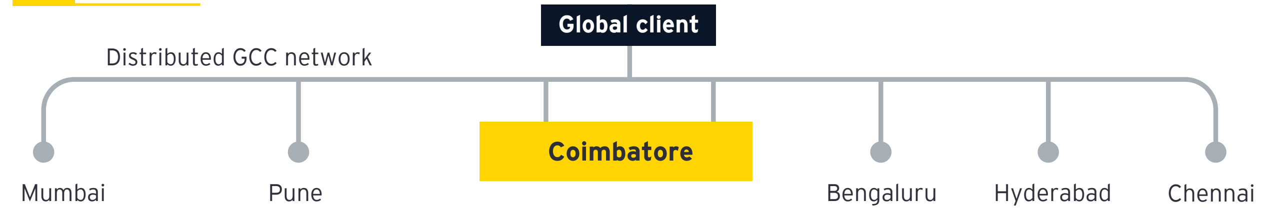
Case study 4: A US-based global media company
Coimbatore as a graduate talent training hub for a distributed GCC network

6,500+
employees across India GCC network

Coimbatore serves as the graduate trainee hub within a seven-city distributed delivery model, combining early-career talent, mobility and cost efficiency to support international client work.

1. **380** permanent employees
2. **80-100** fresh graduates hired annually
3. **Two months** structured internship
4. **15 months** mobility eligibility

01 Overview



Teams serving the same international client can operate across three locations.

02 Journey

Graduate-to-global talent journey

Source	**Select**	**Intern**	**Build**	**Deploy**	**Mobilize**
Kongu-belt colleges	Role fit + communication	Two-month program	Sector, media, tech and data skills	International client teams	Eligible after 15 months

Media: MBA talent | Tech and data: CS/engineering

03 Expansion plan

Scale the Coimbatore hub

380
current permanent employees

Larger office
facility planned

Deeper roles
digital marketing, media, technology and data

Network mobility
use mobility to access wider talent and careers

Expansion logic
Increase capacity while retaining Coimbatore's role as an early-career talent engine for the wider GCC network.

04 Why Coimbatore

PROs

- High-quality graduate pool
- Strong education ecosystem
- Cost advantage vs larger cities
- Direct client-facing capability
- Mobility supports retention and careers

Remaining Challenges

- Significant training investment
- Specialized talent remains limited
- Communication readiness varies
- Thin senior media leadership pool
- 15-20 year profiles difficult to source

Strategic ambition | Coimbatore is best positioned as a scalable early-career talent and training hub, connected through mobility to a wider GCC network that supplies specialized roles, leadership depth and distributed delivery resilience.

Case study 5: A Canadian machinery and equipment company
How Coimbatore supports the next phase of GCC growth

2011
Greenfield centre established

A Canadian machinery and equipment company is preparing to double its Coimbatore GCC headcount and evolve the location into a global center of excellence for integrated, end-to-end customer solutions.

1. **~250** employees today
2. **50** GCC professionals
3. **~15 years** operating in Coimbatore
4. **Twofold** planned GCC scale-up

01 Overview

Current location mandate

Design
Engineering design

Procurement
Procurement services

Applications
Application engineering

Enterprise
Support to worldwide entities

Sector
Machinery and equipment manufacturing

GCC role
50-member capability team within a broader 250-person Coimbatore operation

02 Journey

Graduate-to-global talent journey

2011 -	Build -	Integrate -	Scale -	Next -
Greenfield launch	**Engineering base**	**Regional ecosystem**	**Steady growth**	**Global CoE**
Established Coimbatore facility	Design and application engineering	Two-month program	Sector, media, tech and data skills	End-to-end customer solutions

Engineering + procurement + manufacturing + supply chain

03 Expansion plan

Double GCC scale

~50 - 100+

Next 18-24 months

- Expand engineering and GCC headcount
- Develop integrated end-to-end customer solutions
- Position Coimbatore as a global center of excellence
- Deepen internal talent and leadership pipeline

04 Why Coimbatore

PROs

- Strong multi-disciplinary engineering pipeline
- Academia partnerships and early engagement
- Deep manufacturing and supplier ecosystem
- Workforce stability and favorable climate
- Cost-efficient long-term growth platform

Remaining Challenges

- Connectivity remains the largest issue
- Experienced lateral talent is harder to attract
- Middle-management and senior leadership gaps
- Specialized engineering talent requires internal development

Strategic ambition | Coimbatore's engineering talent, industrial depth and workforce stability create a credible platform for scaling from a local engineering center into a global center of excellence, provided connectivity and senior-talent constraints are actively managed.

Case study 6: Global manufacturer of compressed air solutions and industrial equipment, headquartered in Coimbatore

Building India Capability Center (ICC)

INR4,000 crore
approx. revenue

Coimbatore is the Indian firms' largest workforce location and the core for manufacturing, corporate functions and selected global support capabilities. Future growth is expected to remain focused and capability-led.

1. **~2,000** employees worldwide
2. **~1,300-1,500** estimated India workforce
3. **~100** employees in Bengaluru
4. **Top three** global brand ambition

01 Overview

Global compressed-air company

Global footprint
India, Middle East, Europe, North America, Australia and Southeast Asia

India's position
Near-dominant position across operating product segments

Coimbatore
Largest workforce location; all production plus major support functions

Hybrid footprint
Bengaluru support roles; sales and service teams distributed across India

02 Journey

Coimbatore-based capability evolution

1. **Manufacturing core**
All production concentrated in Coimbatore
2. **Corporate backbone**
HR, finance and product management
3. **Engineering depth**
R&D, drawings, SKU and custom-package work
4. **Global support**
North America support and international time zones
5. **Finance capability**
Accounting, AR/AP, closing, compliance and audit support
6. **Talent shift**
More ambitious professionals relocating without a perceived career compromise

Capability-led global support, not a high-volume back office

03 Expansion plan

Global growth + M&A enablement

Overseas markets
Retain customer-facing and revenue-critical roles locally

India hub
Move suitable finance, compliance, product and engineering work

M&A synergies
Integrate acquired businesses and reduce duplicated on-ground costs

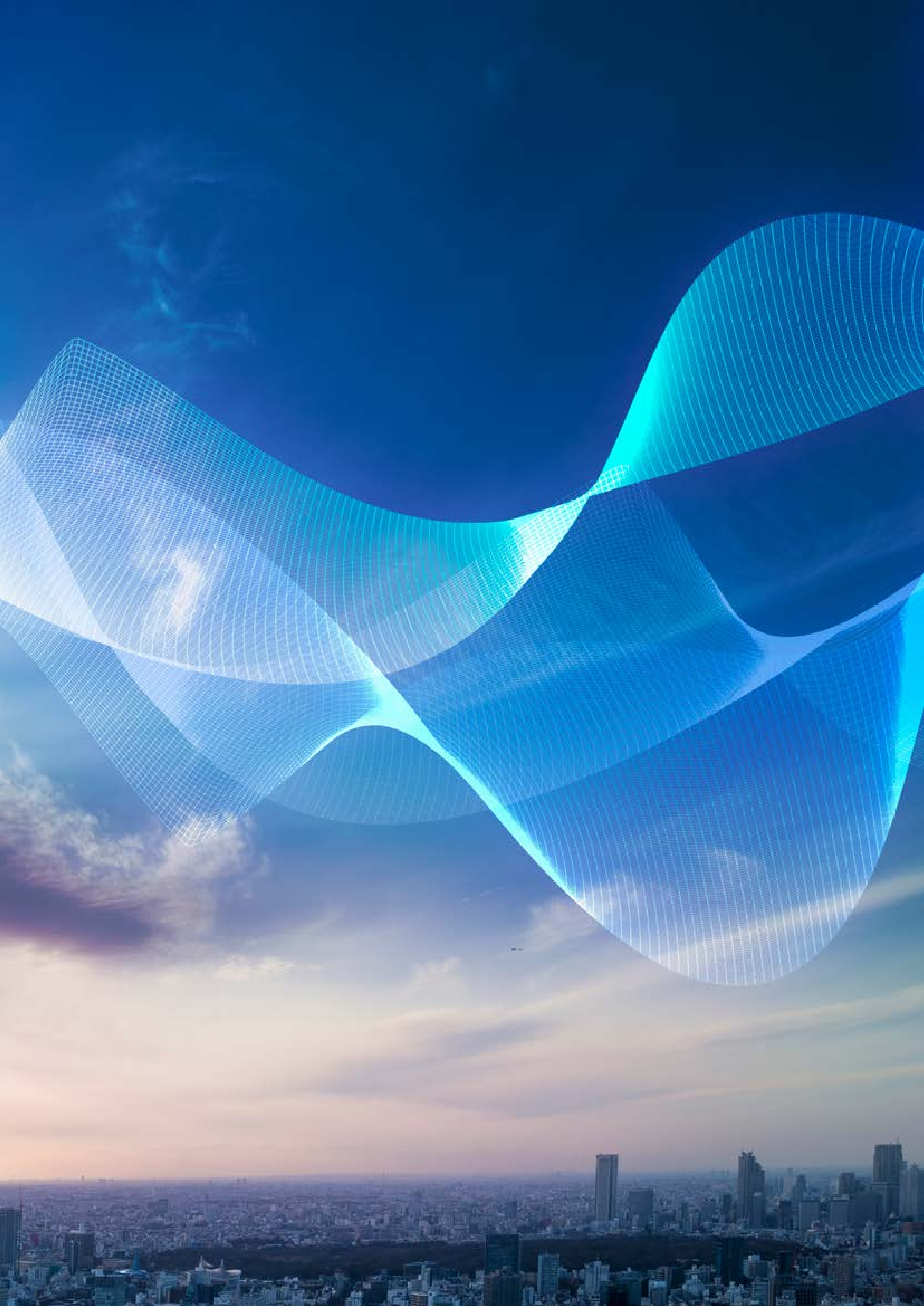
Coimbatore role
Focused capability hub; scale depends on transaction complexity

04 Advantages

PROs
- Established manufacturing and functional base
- Existing teams with overseas-market experience
- Cost advantage versus Australia, Europe and North America
- Engineering, product and finance capabilities already in place
- Improving ability to attract ambitious professionals

Considerations
- In-house versus outsourced delivery model still under assessment
- Likely scale remains focused unless M&A increases volume
- AI use is fragmented; enterprise data and AI agenda need strengthening

Strategic ambition | Coimbatore is best positioned as a scalable early-career talent and training hub, connected through mobility to a wider GCC network that supplies specialized roles, leadership depth and distributed delivery resilience.



CHAPTER 5

Appendix

5.1

Talent and engineering depth

The talent story

Parameter	Key numbers
Engineering colleges	**137**
IT workforce	**300,000+**
STEM graduates from engineering institutions	**30,000+ annually**
Notable institutions	**PSG Tech, Amrita Vishwa Vidyapeetham, CIT, Kumaraguru College of Technology**
Industry-academia platforms	**PSG IIIC, Amrita AI & Cybersecurity Center, CIBI**

Key recruitment and talent areas

Major recruiters	**Major IT players, consulting firms, e-commerce companies, etc.**
Key talent areas	**Embedded systems, manufacturing technology, R&D, product engineering**

Source: https://www.innovspace.com/blogs/why-coimbatore-india-next-gcc-destination

5.2

Workforce stability and cost advantage

Parameters	Coimbatore	Bengaluru	Hyderabad	Pune	Chennai
Grade-A office rent (INR/sq. ft./month)	INR55-70	INR75-125	INR50-95	INR55-100	INR50-90
Cost index	70	100	92	90	88
Senior engineer attrition	8-12%	18-22%	~15%	~14%	~13%
State GCC incentive	Tamil Nadu IT Policy incentives	Karnataka GCC Policy (established)	Telangana AI Mission, active state support	Maharashtra GCC ecosystem, mature	Tamil Nadu IT Policy incentives

Ahead of the emerging-city pack

Parameters	Coimbatore	Indore	Jaipur	Kochi	Chandigarh
Grade-A office rent (INR/sq. ft./month)	INR55-70	INR45-65	INR50-65	INR60-75	INR65-80
Senior engineer attrition	8-12%	9-13%	10-14%	9-13%	10-14%
Time to First 50 Hires	10-14 weeks	12-16 weeks	12-16 weeks	10-14 weeks	10-14 weeks
State GCC Incentives	Tamil Nadu IT Policy incentives	Karnataka GCC Policy (established)	Rajasthan IT/ ITeS incentives	Kerala IT Parks incentives	Punjab/Chandigarh IT incentives

Sources: https://bootminds.com/resources/tier-2-gcc-cities-2026/ | https://savannahr.com/blog/bangalore-vs-hyderabad-vs-pune-gcc-2026 | https://www.quantalent.ai/resources/gcc-hiring-bangalore-vs-hyderabad-vs-pune-vs-chennai

5.3

Policy, innovation and ecosystem readiness

Tamil Nadu GCC policy[10] and Coimbatore advantage

Tamil Nadu has established one of India's early dedicated payroll-linked incentive frameworks for Global Capability Centers (GCCs), aimed at attracting and supporting high-value GCC investments. The policy period runs from 1 April 2024 to 31 March 2027, with Coimbatore and Madurai identified alongside Chennai as destinations for GCC expansion.

Category	Illustrative enterprise archetypes
Policy leadership	Dedicated payroll-linked incentive scheme for GCCs
Government order	G.O. (Ms.) No. 34, Industries, Investment Promotion & Commerce Department, dated 12 March 2024
Policy period	1 April 2024 – 31 March 2027
Target outcome	Support the establishment and expansion of 50 GCCs during the policy period
Eligible companies	Forbes Global 2000 and Fortune 1000 companies; exceptions may be considered by the Inter-Departmental Committee
Payroll incentive	30% in year one, 20% in year two and 10% in year three of eligible payroll costs
High-paying jobs	Incentive linked to high-paying jobs, with the Budget announcement specifying pay above INR 1 lakh per month
Priority GCC locations	Chennai, Coimbatore and Madurai
R&D ecosystem	Tamil Nadu R&D Policy 2022 supports innovation, research infrastructure and centers of excellence

Illustrative payroll incentive

Assumption: 200 eligible employees with an average eligible basic wage of INR1.5 lakh per month

	Year 1	Year 2	Year 3
Annual eligible payroll	INR 36 crore	INR 36 crore	INR 36 crore
Incentive rate	30%	20%	10%
Illustrative incentive	INR 10.8 crore	INR 7.2 crore	INR 3.6 crore

Total illustrative incentive over three years: INR21.6 crore

Infrastructure for the future[11]

Area	Key development
Airport	INR2,000+ crore expansion; terminal capacity increasing from 18,000 sq. m. to 75,000 sq. m.
Roads	Avinashi Road Elevated Expressway and Ukkadam-Aathupalam Flyover
Public transport	INR9,000 crore Metro Rail project approved
Smart City initiatives	Lake restoration and urban renewal projects
Sustainable mobility	30+ km of non-motorized transport corridors
Renewable energy	Solar power projects in Ukkadam

SNS iHub at a glance

Parameter	Key indicators
Positioning	India's largest nonprofit startup campus
Startup goal	1,000 startups incubated in 10 years
Startup programs	Over 14 cohort programs
Mentor network	Over 300 mentors
Investor network	Over 50 investors
Annual events	Over 100
Startup support	Landing zone, incubation, mentorship, funding support
Technology focus	AI, ML, IoT, robotics, AR/VR, metaverse, digital twins, 3D printing
Innovation framework	Seven industry verticals × seven technology domains

Sources: https://snsihub.ai/

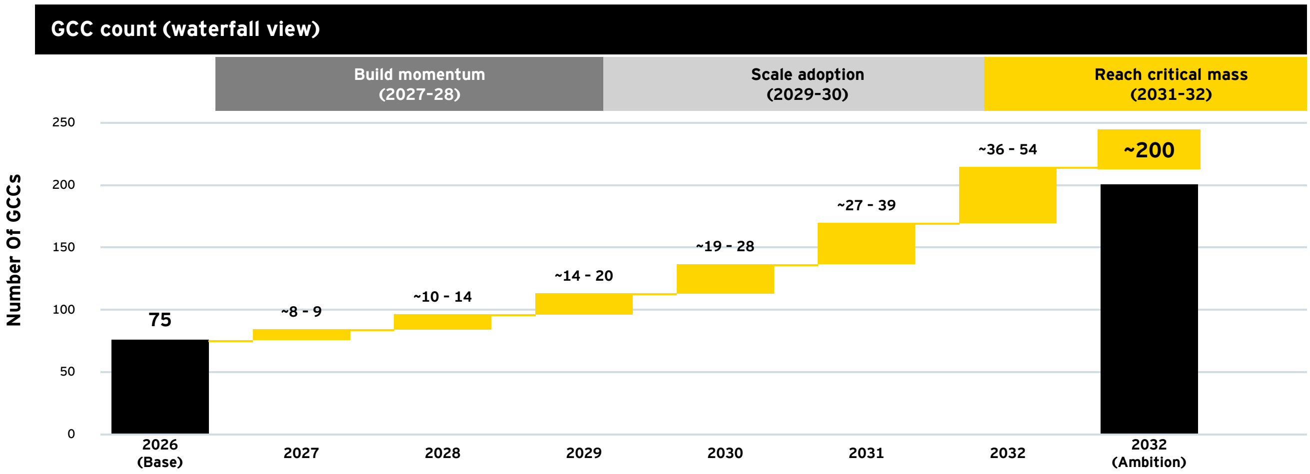
Leapfrog to 200 GCCs by 2032

The starting base is 75 GCCs in 2026.[12]

- Assumptions for the ambition to 200
- Annual growth increases from 10% to 12% in 2027 to 24% to 27% in 2032 as the ecosystem matures
- Growth is applied to the previous year's GCC count
- Approximately 120[13] GCC opportunities arise in India annually: approximately 80 new and approximately 40 expansions
- Coimbatore captures an increasing share over time, averaging 18%.
- Figures are illustrative and based on current market trends and ecosystem potential

[10]Source - CII
[11]Coimbatore Infrastructure Growth: Tracking Progress in Recent
[12]Source - CII
[13]India GCCs: India's GCC count rises to 1,700 in FY24, revenue up 40% at $64.6 billion: report - The ...

A phased and achievable path, with progressively higher growth as the ecosystem matures



Year	2026	2027	2028	2029	2030	2031	2032
GCC count (start of year)	75	75	83 - 84	93 - 97	107 - 114	126 - 138	152 - 171
Annual growth rate (assumed)	-	10%-12%	12%-15%	15%-18%	18%-21%	21%-24%	24%-27%
GCC additions (range)	-	8 - 9	10 - 14	14 - 20	19 - 28	27 - 39	36 - 54
GCC count (end of year)	75	83 - 84	93 - 97	107 - 114	126 - 138	152 - 171	~200

Key takeaways

75→ ~200

GCCs by 2032
(~125 incremental GCCs over six years)

10%-12% → 24%-27%

Assumed annual GCC count growth, increasing as ecosystem matures

~21% CAGR

(2026-2032)

~120

GCC opportunities in India per year
(~80 new + ~40 expansions)

~18%

Average share of India's incremental opportunity (range ~8%-25%)

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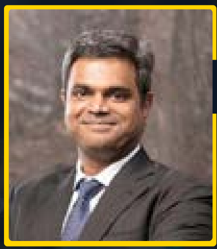

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Ecospace Business Park
Outer Ring Road, Bellandur -
Sarjapura Area, Varthur Hobli,
Bengaluru Urban - 560103

Bhubaneswar
8th Floor, O-Hub, Tower A
Chandaka SEZ
Bhubaneswar - 751024
Tel: + 91 674 274 4490

Chandigarh
Elante offices, Unit No. B-613 & 614
6th Floor, Plot No- 178-178A
Industrial & Business Park, Phase-I
Chandigarh - 160 002
Tel: + 91 172 6717800

Chennai
6th & 7th Floor, A Block,
Tidel Park, No.4, Rajiv Gandhi Salai
Taramani, Chennai - 600 113
Tel: + 91 44 6654 8100

Delhi NCR
Aikyam
Ground Floor
67, Institutional Area
Sector 44, Gurugram - 122 003
Tel: + 91 124 443 4000

3rd & 6th Floor, Worldmark-1
IGI Airport Hospitality District
Aerocity, New Delhi - 110 037
Tel: + 91 11 4731 8000

4th & 5th Floor, Plot No 2B
Tower 2, Sector 126
Gautam Budh Nagar
Noida - 201 304
Tel: + 91 120 671 7000

Hyderabad
THE SKYVIEW 10
18th Floor, "SOUTH LOBBY"
Survey No 83/1, Raidurgam
Hyderabad - 500 032
Tel: + 91 40 6736 2000

THE SKYVIEW 20
2nd Floor, 201 & 202
Right Wing, Survey No 83/1
Raidurgam, Hyderabad - 500 032
Tel: + 91 40 6736 2000

Jaipur
9th Floor, Jewel of India
Horizon Tower, JLN Marg
Opp Jaipur Stock Exchange
Jaipur - 302018
Tel: + 91 141 4618415

Kochi
7th Floor, ABAD Nucleus
NH-49, Maradu PO
Kochi - 682 304
Tel: + 91 484 433 4000

Kolkata
22 Camac Street
3rd Floor, Block 'C'
Kolkata - 700 016
Tel: + 91 33 6615 3400

6th floor, Sector V, Building Omega
Bengal Intelligent Park, Salt Lake
Electronics Complex, Bidhan Nagar
Kolkata - 700 091
Tel: + 91 33 6615 3400

Mumbai
14th Floor, The Ruby
29 Senapati Bapat Marg
Dadar (W), Mumbai - 400 028
Tel: + 91 22 6192 0000

5th Floor, Block B-2
Nirlon Knowledge Park
Off. Western Express Highway
Goregaon (E)
Mumbai - 400 063
Tel: + 91 22 6192 0000

3rd Floor, Unit No.301
Building No.1, Mindspace-Gigaplex
IT Park, MIDC, Plot No. IT-5
Airoli Knowledge Park
Airoli West, Navi Mumbai - 400 708
Tel: + 91 22 6192 0003

18th Floor, Altimus
Pandurang Budhkar Marg, Worli
Mumbai - 400 018
Tel: + 91 22 6192 0503

Pune
C-401, 4th Floor
Panchshil Tech Park, Yerwada
(Near Don Bosco School)
Pune - 411 006
Tel: + 91 20 4912 6000

10th Floor, Smartworks
M-Agile, Pan Card Club Road
Baner, Pune - 411 045
Tel: + 91 20 4912 6800

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Confederation of Indian Industry

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering Industry, Government and civil society through advisory and consultative processes.

CII is a non-government, not-for-profit, industry-led and industry-managed organisation, with over 10,500 members from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 365,000 enterprises from 332 national and regional sectoral industry bodies.

For more than 130 years, CII has been engaged in shaping India's development journey and works proactively on transforming Indian Industry's engagement in national development. CII charts change by working closely with the Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness, and business opportunities for industry through a range of specialised services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues.

Through its dedicated Centres of Excellence and Industry competitiveness initiatives, promotion of innovation and technology adoption, and partnerships for sustainability, CII plays a transformative part in shaping the future of the nation. Extending its agenda beyond business, CII assists industry to identify and execute corporate citizenship programmes across diverse domains, including affirmative action, livelihoods, diversity management, skill development, empowerment of women, and sustainable development, to name a few.

For 2026-27, CII has identified "Accelerating Competitiveness: Growth, Resilience, Inclusion, Sustainability, Trust" as its theme, prioritising five key pillars. During the year, CII will align its policy advocacy, institutional initiatives, partnerships, and outreach to support Indian industry in strengthening these five interconnected pillars of competitiveness.

With 70 offices, including 12 Centres of Excellence, in India, and 9 overseas offices in Australia, Egypt, Germany, Indonesia, Singapore, UAE, UK, and USA, as well as institutional partnerships with 255 counterpart organisations in 102 countries, CII serves as a reference point for Indian industry and the international business community.

Confederation of Indian Industry
Coimbatore Zonal Office
(Southern Region)

Unit No: B - 3A - 1, II, Elysium Central, Main Rd, opp. Carmel Garden School, Ramalinga Chettiyar Layout, Puliakulam, Coimbatore, Tamil Nadu 641045

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