Confederation of Indian Industry

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COIMBATORE GCC TALENT OUTLOOK

Can Coimbatore become India's next high-value GCC destination? The Path to 2030 from a talent lens

SEPTEMBER 2026

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REPORT STRUCTURE

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Seven sections – city context, GCC landscape, the GCC talent deep-dive, policy, and the 2030 roadmap

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EXECUTIVE SUMMARY

What the Data Says in 2026

Coimbatore's talent maturity and GCC-fit density now put it in Tier-1 territory, even as leadership depth remains the one gap still catching up

75+ GCCs · 32K+ Professionals

Roughly 7% year-on-year GCC talent growth.
Five anchors already hold 35% of headcount from just 7% of centers - Coimbatore is compounding, not forming.

Engineering Is the Mandate - 62% ER&D

62% of GCC talent sits in ER&D, against 20% IT and 18% BPM - one of the highest engineering shares of any Indian GCC hub. The industrial anchor vertical alone holds 31% of headcount.

Americas Lead by centers Count - 65% · Europe 24%

By center count, the split is 65% Americas, 24% Europe, 11% APAC. Europe's momentum runs through industrial, automotive and retail - the verticals Coimbatore already serves.

Leadership Is the GCC Bottleneck

Director-and-above demand across Coimbatore GCCs runs roughly 3× the local bench.
GCC talent already skews senior - 62% at 6+ years versus 47% city-wide - so centers compete for the same thin slice.
Only the two oldest anchors have grown homegrown leaders so far.

GCC Hiring Is Faster - and Accelerating

GCC job postings are up 76% over six quarters, and roles fill 28-37% faster than in Bengaluru.
Attrition sits at 11.2% versus Tier-1's 20%+ - hiring here stays hired, saving roughly 21 backfills a year on a 200-person center.

Mandates Are Maturing, Not Just Headcount

24% of Coimbatore's GCCs opened in the last 24 months, yet only the pre-2019 cohort has climbed from pilot to global mandate - a 15-19-year journey. The TN payroll subsidy (capped at the first 50 GCCs, closing March 2027) is the lever that could compress that timeline for new entrants.

Source: Collabera GCC Research Desk

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EXECUTIVE SUMMARY

What Changed Since the Baseline

2 years of growth: more centers, a larger talent base + every function expanding

Indicator	CII Coimbatore baseline (FY2024)	Position (2026)	Change
Active GCCs	50+	75+	**~1.5×**
Installed GCC talent	11K+	32K+	**~2.9×**
GCC Headquarters Distribution	North America – 49% EMEA – 44% APAC – 7%	North America – 71% EMEA – 23% APAC – 6%	
Large GCCs (850+ people)	Not reported	7 centers · 59% of headcount	**New measured**
Global Fortune 500 parents	Present, not counted	7	**Now measured**
GCC revenue	~USD 260 Mn	~USD 940 Mn	**~3.6×**
ER&D talent	62% of GCC talent	2.1-2.9× larger	**Progressive · at least 2×**
IT talent	20% of GCC talent	1.5-2.9× larger	**Progressive · at least 1.5×**
BPM talent	18% of GCC talent	2.9-7.5× larger	**Progressive · at least 3×**
Grade-A office market	8.1 Mn sq. ft. stock	8-10 Mn sq. ft. stock	**Pipeline = 78% of current stock**

Takeaway

In 2 years, Coimbatore added 20+ centers, nearly tripled its GCC talent and grew estimated revenue ~3.6× with every function expanding.
7 large centers now hold 59% of headcount. 2 constraints ahead: office supply, at near-zero vacancy until the pipeline lands and the senior leadership bench.

Source: Collabera GCC Research Desk, CII Coimbatore – Coimbatore Rising baseline study (Jul 2025)
Note: The comparisons made here are direct to direct from the previous edition of CII Coimbatore report, a few GCCs missed in the previous versions are included in our current analysis

02

Five Key Trends



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TRENDS

Five National GCC Shifts and How Coimbatore Captures Them

These are GCC-market trends, not a general talent forecast. Each carries a talent implication, and the right-hand column names where that implication is evidenced later in this report

01	Tier-1 Saturation Is Structural, Not Cyclical	Bengaluru senior-engineer attrition runs 18-22% against 8-12% in Coimbatore, on a cost index of 100 against 70. Mid-market GCCs are not choosing emerging cities so much as being pushed toward them. The capture window is 2026-2028.	Deep-dived in Section 03 (competitive position) and Section 05 (attrition, salary)
02	Engineering-Led Mandates Are Replacing Pure IT Delivery	62% of Coimbatore GCC talent sits in ER&D. The anchor centers run embedded software, ADAS, EV systems, flow-control design and OT cybersecurity, not delivery operations. This is the defining mandate shift of the cycle, and Coimbatore is its natural home.	Deep-dived in Section 05 (function mix, skillset heatmap, legacy-industry conversion)
03	AI Is Augmenting Engineering Workloads, Not Creating Standalone Teams	Only 21% of the city's AI-skilled professionals hold AI or data science as their primary workload. GCCs embedding AI into development, QA and operations need AI-augmented engineers rather than pure specialists, which is precisely the supply profile on offer.	Deep-dived in Section 05 (AI-ready pipeline, supply against demand)
04	Mid-Market GCCs Are the Active Growth Engine	centers in the 200-999 band are 29% of the count but 43% of headcount and hold the fastest ramp rates. 24% of all Coimbatore GCCs opened in the trailing 24 months, mostly first-India or second-city resilience centers from Europe and North America.	Deep-dived in Section 04 (size distribution, vintage cohorts)
05	State Policy Has Become a Real Competitive Differentiator	Tamil Nadu runs India's first payroll-linked captive incentive, capped at 50 GCCs and naming Coimbatore and Madurai for dedicated infrastructure support. The first-mover window is open only through March 2027.	Deep-dived in Section 06 (the Tamil Nadu incentive stack)

Source: Collabera GCC Research Desk



03

Coimbatore City Landscape

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CITY LANDSCAPE

Coimbatore on a Page

Three enduring strengths engineering depth, manufacturing expertise and workforce stability

WHY COIMBATORE

100+ years of industrial legacy
Textile capital of South India; one of India's largest engineering and foundry ecosystems

Engineering-led economy
Pumps, motors and precision manufacturing with deep automotive and industrial supply chains

Technology evolution
IT, ER&D and digital engineering GCC expansion is the third wave of city growth

Industrial excellence to GCC
Industrial depth created the talent base; GCCs are the next use of it

COIMBATORE IN NUMBERS

3.8M
Population

300K+
Tech workforce

75+
Active GCCs

91%+
Literacy rate

58%
Working population

#2
Largest city in TN

8-10Mn sq. ft. Grade-A office stock · 250+ higher-education institutions

WHY GCCS ARE COMING

Talent at scale
100K+ graduates a year, 50K+ of them engineers

Workforce stability
11.2% GCC attrition – lower than Tier-1 GCC hubs

Cost advantage
Cost index of 70 against Bengaluru at 100

Policy support
Payroll-linked GCC incentives; a named 50-GCC state target

Innovation ecosystem
PSG-STEP, Forge, Amrita TBI, SREC Spark, SNS iHub, Rathinam AIC Raise and more

Quality of life
Sub-20-minute commutes, affordable housing, strong social infrastructure

STRATEGIC IMPLICATION

Coimbatore should compete on engineering depth and industrial expertise, not cost alone. The opportunity is to become India's specialist hub for engineering-led global capabilities a position no other Tamil Nadu city can claim.

Source: Collabera GCC Research Desk, September 2026

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CITY LANDSCAPE

Industrial Base: What the Talent Was Built On

A manufacturing backbone, genuine sectoral diversity and a thickening technology layer on top

Manufacturing Backbone

- Textile machinery, auto components, pumps and heavy engineering form a single contiguous cluster
- 600+ unit pump cluster the basis of the 'India's Pump City' position, unmatched in Tamil Nadu
- LMW, ELGi, Pricol, Roots, CRI, Craftsman Automation and KPR anchor the industrial employer base
- Foundries and machine shops sit alongside design talent the reason discrete-engineering GCCs land here

Sectoral Diversity

- Strong base in automotive, embedded systems and industrial technology
- Emerging AI-led healthcare cluster, with RCM and health analytics already at employer scale. Prominent hospitals such as KMCH, Ramakrishna Hospitals, PSG Hospitals, GKNM, Ganga, Gem, etc. runs world-class research units
- Growing SaaS and enterprise-product ecosystem majorly cultivated through Coimbatore native enterprises and Startups such as Kovai.Co, KGiSL, AppViewX, iamneo, etc.
- Textiles, apparel, energy and professional services add depth without concentration risk

Technology Layer

- 150+ global technology MNCs present across IT, ER&D and BPM
- 75+ active GCCs, led by industrial, energy, healthcare and retail charters
- Large IT-services delivery base (Cognizant, IBM, TCS, Infosys, Wipro, HCL, LTTS) supplying the switch pool
- KGiSL SEZ, TIDEL Park, Hanudev, Rathinam Tech Zone, Tanny Shelters and CODISSIA Industrial Park provide the physical cluster points

WHY IT MATTERS The industrial cluster is not background colour - it is the supply side of the talent story. The mechanical, electronics and quality-engineering base is what makes Coimbatore credible for engineering-led mandates, and it is the raw material for the Manufacturing 4.0 conversion covered in Section 05.

Source: Collabera GCC Research Desk, September 2026

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CITY LANDSCAPE

Infrastructure, Connectivity and Office Supply

Investment is in flight across air, metro and roads office supply is the near-term binding constraint

8-10 Mn

Sq. ft. Grade-A stock as of H1 2026

Second-largest office market in Tamil Nadu after Chennai

₹9,000 Cr

Metro Rail approved

147 km across five corridors; Phase 1 survey began Mar 2025

₹2,200 Cr+

Airport expansion

Terminal capacity rising from 18,000 to 75,000 sq. m.

<20 min

Average commute

Lowest of any major Indian GCC city the primary retention driver

Dimension	Position today	In flight	GCC read
Office supply	8-10 Mn sq. ft. Grade-A, concentrated in TIDEL Park and ELCOT-anchored corridors; 30-35% lower rentals than metros	New parks near the airport, key highways and emerging residential zones	Grade-A office space supply is still a constraint for immediate occupancy, however the new projects by Casagrand, Tanny Shelters, etc. will enable this in the next few months. Strong expansion of co-working space providers like Indiqube, SpazOne, Namma Office has enabled GCCs to kickstart in zero lead time
Air connectivity	Direct international service to Singapore, Dubai, Abu Dhabi and Colombo; ~1,000 departures a month across 11 airports	Terminal expansion underway to handle 4,200 passengers	Named weakness by every GCC leader interviewed the single most-cited disadvantage
Urban mobility	43% public-transport mode share; 63 buses per lakh population; 30+ km of non-motorised corridors	Metro Phase 1 (two corridors, 32 stations)	Strength. Commute advantage is the retention moat protect it as the city densifies
Cluster points	KGiSL SEZ, TIDEL Park, PSG iTech, CODISSIA Industrial Park (Kallapalayam)	KGiSL Wynfra 1.6 Mn sq. ft. (2025-27)	Plug-and-play readiness is the fastest lever on time-to-launch
Utilities & environment	99% authorised electricity access; 93% waste-collection efficiency; 30%+ green cover; PM10 above WHO guideline	Smart City Mission works; solar at Ukkadam	Adequate. Air quality is the one livability metric trending the wrong way

Source: Collabera GCC Research Desk, September 2026

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CITY LANDSCAPE

Livability: The Retention Argument

Quality of life is strategically relevant here because it converts directly into workforce stability

Safety

- Among India's top 10 safest cities
- IPC crime rate 211.2 per 100,000 with an 87.4% charge-sheeting rate
- Lowest crime rate against women among 19 major Indian cities

Education

- 91.3% literacy among the highest in Tamil Nadu
- 14+ Cambridge IGCSE schools and 4+ IB-authorised institutions
- 250+ higher-education institutions across all domains

Healthcare

- 750+ government and private hospitals
- 5+ MBBS colleges including PSG IMSR and Coimbatore Medical College
- AAA-rated healthcare infrastructure

Lifestyle & environment

- 500+ restaurants and cafés; 10+ malls; 25+ cinemas, 70+ pickle ball courts
- 10+ public parks; Western Ghats getaways within 100 km
- 46.6 sq. m. green cover per capita against a 50 sq. m. WHO standard

HOW LIVABILITY SHOWS UP IN THE TALENT DATA

Sub-20-minute commutes

Lowest daily friction of any Indian GCC hub - the primary retention factor in employer surveys

20% lower cost of living than Bengaluru

The same CTC buys roughly 1.2× the purchasing power, so talent does not have to job-hop for real income growth

Low poaching pressure

Fewer competing GCCs means far less unsolicited outreach than in Bengaluru or Hyderabad

Return-to-city pull

Reverse migration from Tier-1 cities is now a named talent source in at least three anchor centers

Source: Collabera GCC Research Desk, September 2026

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CITY LANDSCAPE

Competitive Position: Tier-1 Hubs and Emerging Peers

Coimbatore leads on attrition and hiring speed against every city on this page, with a cost-index advantage over all four Tier-1 hubs though not the single cheapest rent on the table

TIER-1 VERDICT

Parameter	Coimbatore	Bengaluru	Hyderabad	Pune	Chennai
Grade-A office rent (₹/sq. ft./month)	**55-80**	75-125	70-100	60-95	60-90
Cost index (Bengaluru = 100)	**70**	100	92	90	88
Senior-engineer attrition	**8-12%**	18-22%	~15%	~14%	~13%
Time to first 50 hires	**10-14 wks**	14-18 wks	14-18 wks	12-16 wks	12-16 wks
State GCC incentive	**TN GCC Policy 2024-27**	Karnataka GCC Policy (mature)	Telangana GCC Policy 2024-30 (targets 1,000 GCCs, 500K+ jobs)	Maharashtra GCC ecosystem	TN GCC Policy 2024-27

EMERGING-PEER VERDICT

Parameter	Coimbatore	Indore	Jaipur	Kochi	Chandigarh
Grade-A office rent (₹/sq. ft./month)	**55-80**	45-65	50-65	55-75	65-80
Senior-engineer attrition	**8-12%**	9-13%	10-14%	9-13%	10-14%
Time to first 50 hires	**10-14 wks**	12-16 wks	12-16 wks	10-14 wks	10-14 wks
Engineering-led talent depth	**Deep - pumps, textiles machinery, auto components**	Moderate	Light	Moderate	Moderate

POSITIONING Indore is marginally cheaper; Kochi and Chandigarh match on hiring speed. None of them match the industrial engineering depth and none has a state policy that names the city for dedicated GCC infrastructure support.

Source: Collabera GCC Research Desk, September 2026

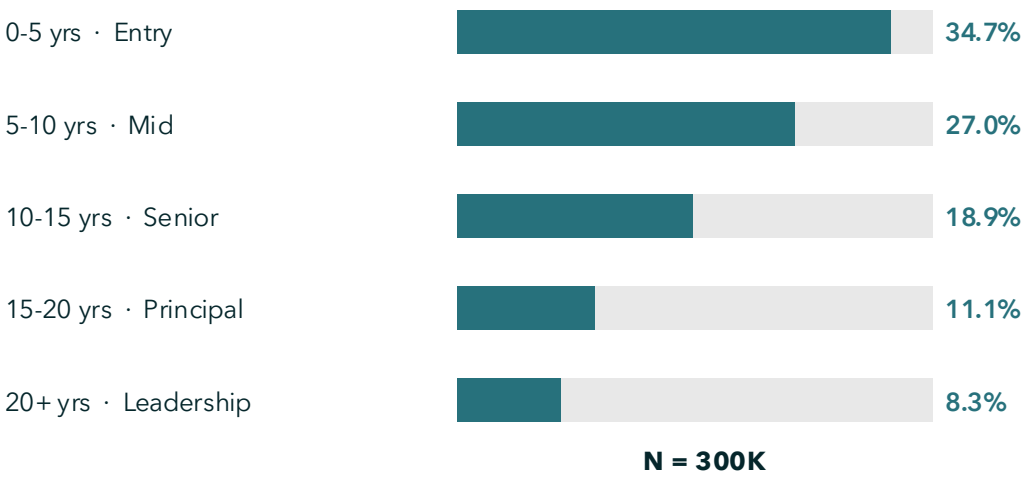
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CITY TALENT ANALYSIS

City-Wide Talent Pool: Structure and Function

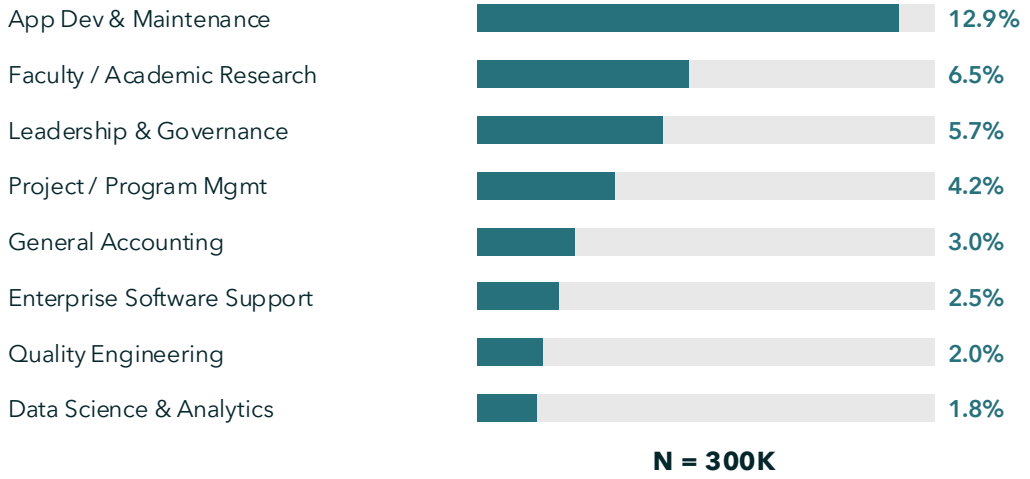
Shares of the experienced-profile base. The pyramid is broad at the base and thin at the very top

EXPERIENCE PYRAMID – % OF EXPERIENCED-PROFILE BASE



Note: 47% of the city-wide base sits at 6+ years. Only 8.3% has crossed 20 years – the layer every GCC leadership search competes for.

TOP FUNCTIONS – % OF EXPERIENCED-PROFILE BASE



Takeaway Application development and maintenance is the single largest function by a wide margin – the fungible pool GCCs can draw on immediately. The presence of academic research as the second-largest function is a Coimbatore signature: it reflects the 250+ institution base, and it is the reason industry-academia curriculum pilots are realistic here in a way they are not in most emerging cities.

Source: Collabera GCC Research Desk, September 2026

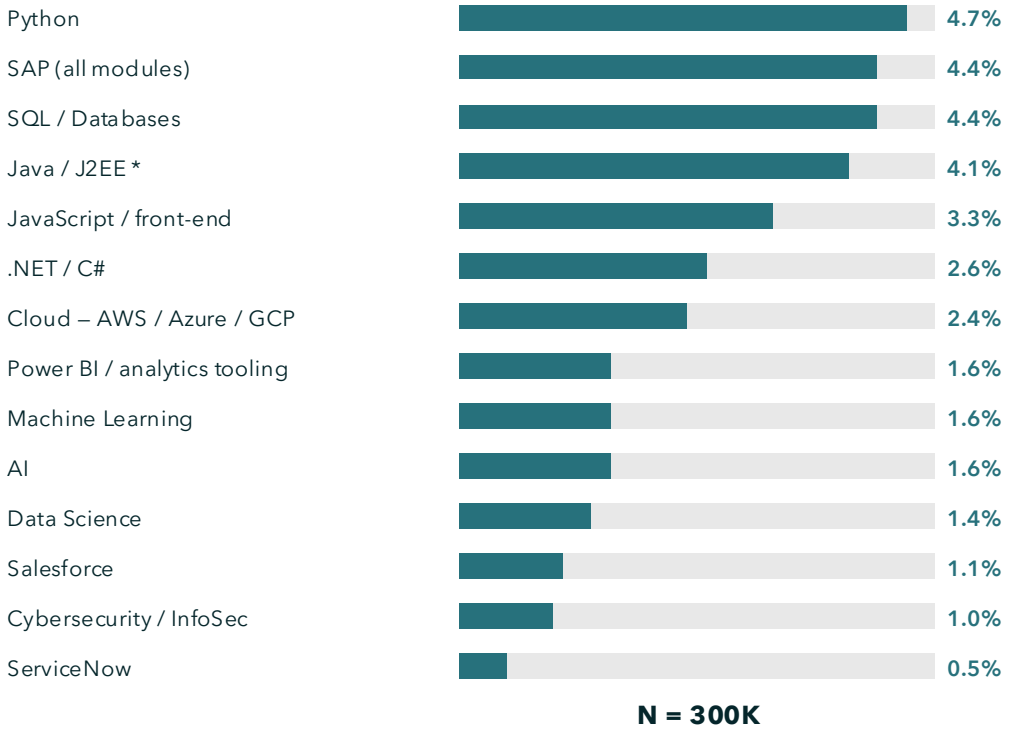
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CITY TALENT ANALYSIS

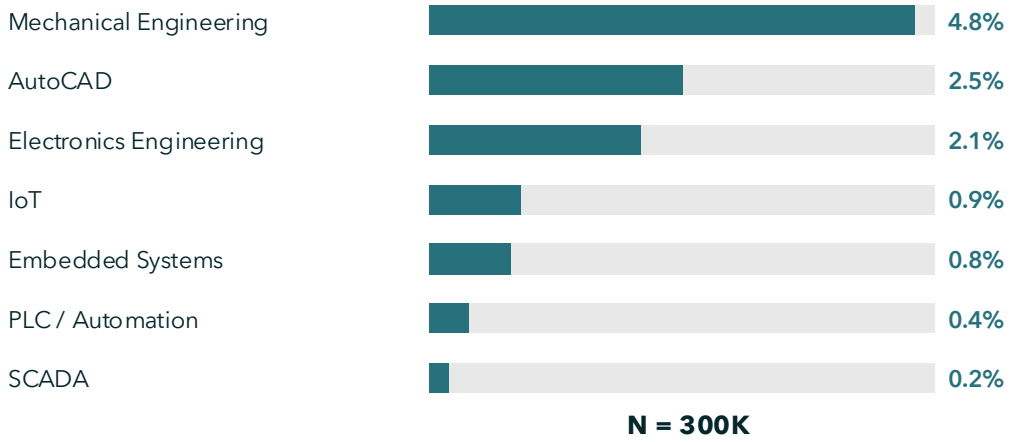
Technical Skills Landscape: Digital, Enterprise and Engineering

Share of the mapped Coimbatore professional base holding each skill. Three stacks, all real, and all deeper than the city's reputation suggests

DIGITAL, ENTERPRISE PLATFORM AND SECURITY STACK



ENGINEERING AND INDUSTRIAL STACK



Mechanical engineering is the single largest skill in the city - larger than Python. This is what differentiates Coimbatore from every other emerging hub.

CERTIFICATION DEPTH

AWS Fundamentals · AWS Cloud Practitioner · Python for Data Science · Azure Fundamentals · Azure AI Fundamentals · Lean Six Sigma · Structural Design Thinking

No single certification is held by even 0.3% of the base. Lean Six Sigma presence is the quality-maturity signal that matters for industrial and automotive charters.

Source: Collabera GCC Research Desk

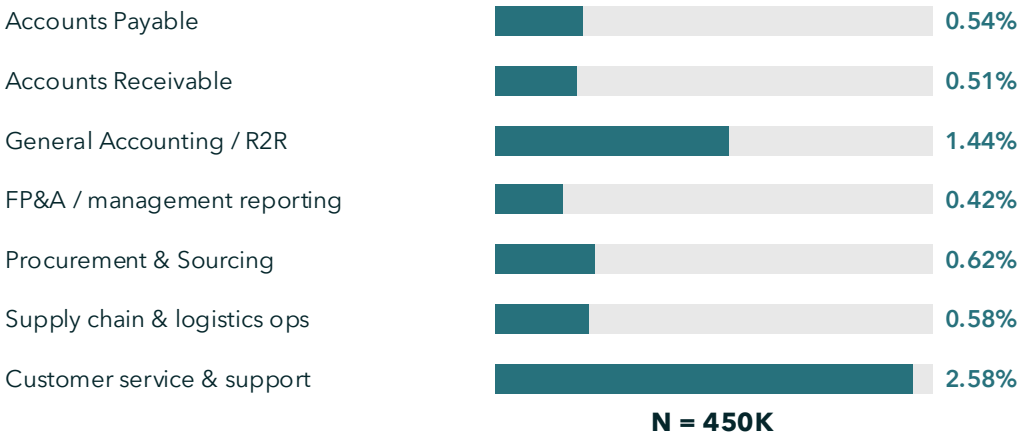
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CITY TALENT ANALYSIS

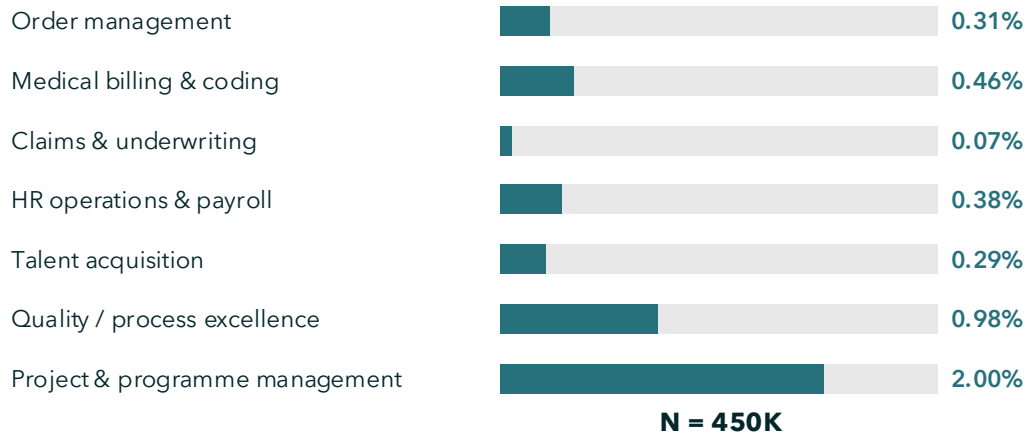
Non-Technical Skills Landscape: Business and Enterprise Operations

The half of the GCC charter that is not engineering: finance, procurement, HR, customer and domain operations

FINANCE, PROCUREMENT AND SUPPLY-CHAIN OPERATIONS



CUSTOMER, DOMAIN, HR AND PROCESS OPERATIONS



Where the depth is real

Customer service and support, project and programme management, general accounting and quality or process excellence are all at meaningful scale. A shared-services or business-operations charter can be staffed here without a skilling programme.

Where it is general-purpose, not specialised

Accounts payable and receivable depth is broad finance skill rather than domain depth. It supports a transactional captive; it does not yet support a regional finance center of excellence.

Where it is genuinely thin

Claims and underwriting sit close to zero, which is the constraint behind the insurance-BPO white space in this section. Talent acquisition and payroll are sufficient for an internal function, not for a regional HR CoE.

Source: Collabera GCC Research Desk

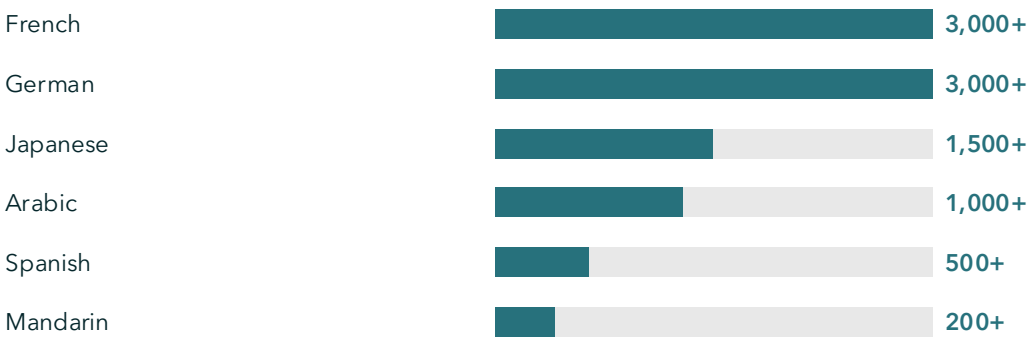
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CITY TALENT ANALYSIS

Language Capability: An Underused Differentiator

8,850+ candidates with a second language beyond English, a real asset for Europe, Japan and Middle East-facing GCC mandates

LANGUAGE HEADCOUNT (BEYOND ENGLISH)



COMBINED POOL & PROFILE

8,850+

candidates across all six languages (deduplicated)

Gender: Male (58%) · Female (42%)

Experience: ~3,500–4,000 with 2–8 years – mid-career weighted, not entry-heavy

Industry: ~2,800+ employed by the Technology and Internet verticals

Business Function: Software Development, Finance and Accounting employs a high chunk of the bilingual talent pool

EMPLOYER LANDSCAPE

Bosch: 500+ German speakers by far the deepest single-language concentration at any named employer. **Avantor:** 20+ bilingual professionals.
IT services generalists: TCS, Accenture, Infosys, Wipro and Cognizant all carry bilingual bench strength as part of their broader delivery base.

7

WHY THIS MATTERS BEYOND TRADITIONAL LANGUAGE SUPPORT ROLES

The obvious use is EU/Japan/Middle East-facing customer support and vendor coordination – real, but not the ceiling. **Higher-value roles this pool is positioned for:** training/evaluating multilingual AI models (RLHF, red-teaming in non-English languages), localization QA for global rollouts, and multilingual data annotation – work that commands a premium and is hard for competing cities to replicate quickly.

Source: Collabera GCC Research Desk



04

GCC Landscape

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GCC LANDSCAPE

GCC Ecosystem Overview

The two anchor numbers and the structural facts behind them

75+

Active GCCs

Up from 50+ at the FY2024 baseline – roughly 1.5× in two years

32K+

GCC professionals

Talent growth rate of 7% year-on-year

24%

Of GCCs under 24 months old

20+ new centers opened in the trailing two years

4.6/10

Hiring difficulty index

Lower is easier. Bengaluru sits at 7.2 / 10

CONCENTRATION AND COMPOSITION

7%

of centers hold 35% of headcount

Five anchors above 1,000 people carry more than a third of the GCC workforce

19+

Fortune 500 parent companies

Present through their Coimbatore centers - the credibility signal for new entrants

62%

of GCC talent in ER&D

Against 20% IT and 18% BPM - an engineering-weighted ecosystem, not a delivery one

65%

of centers are Americas-headquartered

24% Europe and 11% APAC

SCALE CHECK The ecosystem is anchor-dependent but no longer anchor-only: Mid-sized centers now hold 43% of headcount, which is the cohort that determines whether the city reaches 150+ GCCs by 2030.

Source: Collabera GCC Research Desk

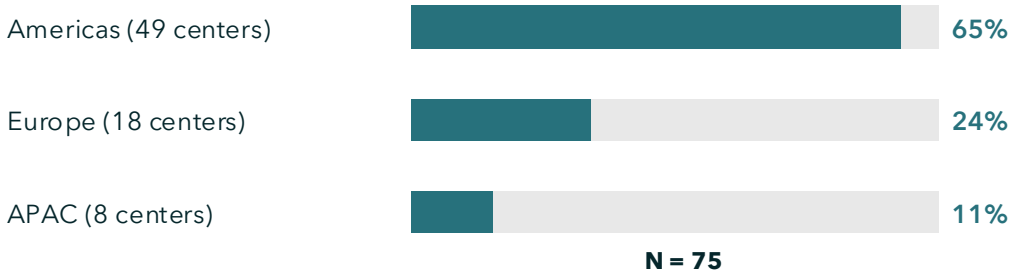
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GCC LANDSCAPE

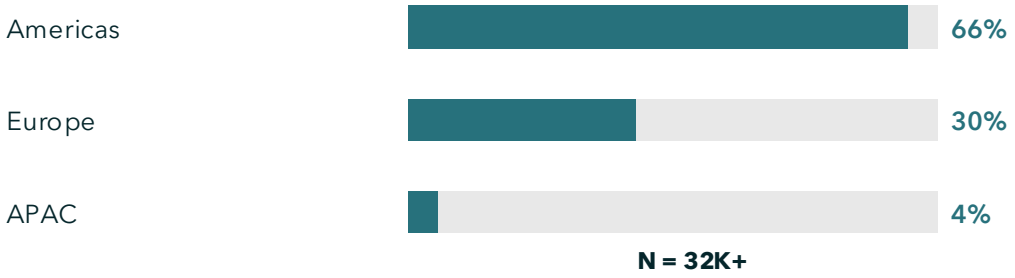
Geographic Origin of Coimbatore GCCs

Parent-company headquarters by region - the Americas dominate, Europe is a strong and growing second

SHARE OF center COUNT



SHARE OF GCC HEADCOUNT



Americas-origin centers are larger on average; APAC centers are mostly sub-200 first footholds.

TOP ORIGIN COUNTRIES BY center COUNT

49	7	4	4	3	3	2	3
USA	Germany	UK	Japan	France	Switzerland	Sweden	Others

METRO+1 OPPORTUNITY

The largest near-term pipeline is not first-time India entrants but enterprises already running large Tier-1 GCCs and now rebalancing for resilience. Existing GCCs such as Continental, GE HealthCare, Eaton, Siemens, Carrier, Danaher, Aptiv, Philips, Medtronic, Stryker and Hitachi has the capability to leverage Coimbatore's GCC ready talent pool from Day 1

Source: Collabera GCC Research Desk

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GCC LANDSCAPE

The Active GCC Roster: Grouped by Scale

Verified centers by scale band. Individual headcounts are held back pending the reconciliation noted below

Large · 1,000+ people

7% of centers · 35% of headcount

BOSCH · slb · STATE STREET · avantor · access · flex · Omega Healthcare

Mid · 200-999 people

29% of centers · 43% of headcount

BlueYonder · GEP Insight Drives Innovation · RPM International Inc. A world leader in specialty coatings and sealants · exterro · MAXVAL · CLARUS

Small · under 200 people

64% of centers · 22% of headcount

MILACRON · colruyt · Commvault · annalect · Ford · arcana

CONCENTRATION READ

Five centers above 1,000 people carry 35% of the workforce while making up 7% of the count, and 48 centers under 200 people carry only 22%. The mid band is where the ecosystem is actually being built: 29% of centers, 43% of headcount, and the fastest ramp rates in the city.

Source: Collabera GCC Research Desk

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GCC LANDSCAPE

Vintage Analysis: When Coimbatore's GCCs Arrived

Three distinct eras, each defined by a different reason companies came to Coimbatore

~22%

Pioneers

Pre-FY2019

- Early entrants came for cost + engineering talent, with Bosch evolving from BCP into an engineering/R&D center
- Industrial anchors leveraged CAD, mechanical design and testing talent
- BPM/shared services grew alongside the engineering base, with Ford as a key anchor

~45%

Build-out

FY2019 - FY2024

- COVID triggered the first major wave, driven by digital, analytics, data science, SAP and IoT talent
- Post-COVID, RCM players expanded GCCs across engineering, R&D, IT and digital
- Companies like Blue Yonder and GEP built advanced analytics/technology functions at speed

~33%

Acceleration

FY2024 - 2026

- 20+ new centers emerged in the last 24 months, adding ~⅓ of today's base
- New GCCs increasingly launch with a defined global mandate from day one
- Coimbatore is gaining deeper talent through reverse-migration and returning talent

WHY VINTAGE MATTERS

How a center arrived predicts what it becomes. Pioneers proved cost-arbitrage could evolve into real R&D over a decade. The 2019-24 cohort proved the city could support digital-native and RCM mandates at the same time. The 2024-26 cohort is testing something new: whether a center can arrive with a global mandate on day one, built on a talent base Coimbatore didn't fully have before COVID.

Source: Collabera GCC Research Desk

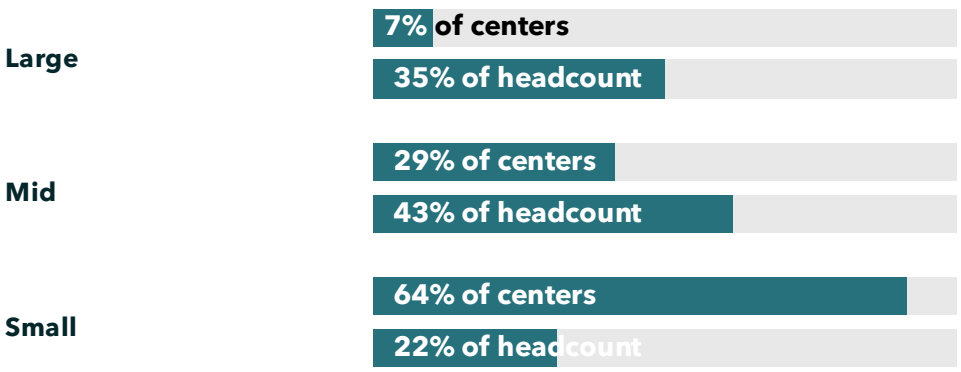
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GCC LANDSCAPE

Size Distribution and Growth Signals

Coimbatore is transitioning from a small-GCC city to a mid- and large-GCC city

center COUNT AGAINST HEADCOUNT, BY SCALE BAND



FASTEST-GROWING CENTERS - YOY HEADCOUNT CHANGE

+10.8X	Industrial flow-control GCC	New ramp from a near-zero base
+81%	AI supply-chain GCC	Chose Coimbatore over five other cities
+43%	Data-protection GCC	Active hiring off a small base
+40%	Data-analytics GCC	Strong campus pipeline
+13%	Energy technology GCC	Steady growth, 20+ years in the city

THE TWO VERTICALS CARRYING THE MOST DEPTH

Hospitals, Healthcare & life sciences

19% of centers · 23% of headcount

Revenue-cycle management is a genuine Coimbatore stronghold four RCM operations have scaled here, alongside clinical-trial and scientific-product work. The SAP competency center inside the largest life-sciences GCC runs 46% of its work on SAP.

BFSI

8% of centers · 13% of headcount

A single custody-bank center anchors the vertical with FP&A, general ledger, reporting and payables work. The gap below it is wide, which is runway: a new BFSI entrant is not competing for the same niche talent.

Software & internet

28% of centers · 18% of headcount

Broad but thin, largest number of centers at the lowest average size. Procurement platforms, supply-chain AI, legal technology, IP and data-annotation charters.

Industrial (non-anchor)

18% of centers · 3% of headcount

Electronics manufacturing services, flow control, oilfield equipment, material handling and cutting tools. Small individually, but the cluster is dense and the peer-replication logic is strongest here.

Source: Collabera GCC Research Desk



✦ 05

GCC Talent Analysis

Collabera

GCC TALENT ANALYSIS

GCC Talent Base: The Anchor View

Where Coimbatore's GCC talent stands today scale, mix and momentum

75+ Active GCCs

32K+ GCC professionals

Fastest headcount growth of any emerging Tamil Nadu hub

~33% **Of centers under two years old**
~25 net new centers since the FY2024 baseline

59% **Of headcount in seven large centers**
centers of 850+ people 9% of all GCCs

~30% **Of headcount in the industrial vertical**
Embedded and industrial engineering, anchor-led

62% **ER&D share of GCC talent (FY2024)**
ER&D talent has since grown at least 2×

WHAT IS DRIVING THE JUMP

Tier-1 saturation
Engineering-led and mid-market GCCs are being pushed out of Bengaluru, Chennai and Pune by cost and attrition, not pulled to Coimbatore by marketing.

The policy window
The state payroll subsidy is capturing first-mover mid-market entrants ahead of the March 2027 cap.

Anchors scaling, not just new logos
The largest existing centers are expanding mandates and headcount which is a faster route to talent growth than new-center wins.

Takeaway Scale is concentrated but compounding. Seven large centers hold 59% of GCC headcount, while a third of all centers arrived in the last 2 years. The next phase depends on those newer centers growing into the mid band.

Source: Collabera GCC Research Desk

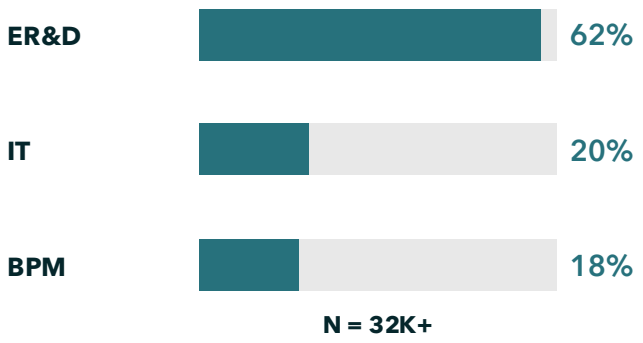
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GCC TALENT ANALYSIS

GCC Talent Against the City Base: Function and Seniority

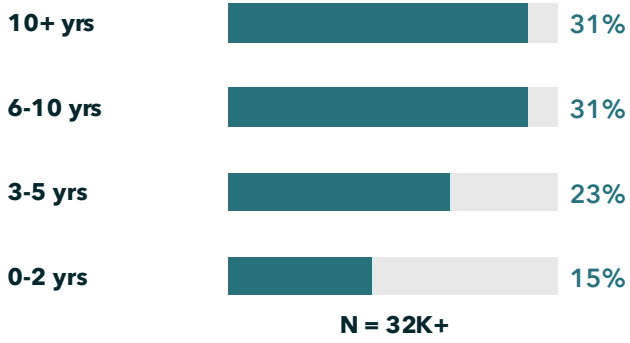
GCCs are not hiring from a separate pool; they are hiring from the top of the same one

GCC FUNCTIONAL MIX



A higher ER&D share than most Tier-1 GCC cities.

GCC EXPERIENCE MIX



62% at 6+ years – the mid-to-senior weighting is already in place.

THE SENIOR SKEW

+15

percentage points

Share of talent at 6+ years: 62% inside GCCs against 47% city-wide. GCCs are pulling disproportionately from the city's most experienced professionals.

The constraint is the top, not the middle

Entry and mid hiring can be done with confidence – the base is broad and replenished annually. The competition is concentrated in the 15-20+ band with prior global-mandate exposure.

ER&D dominance is real, not aspirational

The anchor centers run embedded R&D, industrial engineering, flow-control design and OT cybersecurity. This is not a delivery ecosystem wearing an engineering label.

The real competitor is the IT-services bench

GCCs are largely not competing with each other for volume roles; they are pulling from a very large local IT-services base that actively wants product ownership.

Source: Collabera GCC Research Desk

Collabera

GCC TALENT ANALYSIS

Top GCC Employers and the Work They Actually Do

Workload mapping matters more than headcount - it tells a new entrant what talent has already been trained on

Center (by scale)	Vertical	Core workloads held in Coimbatore
Embedded software anchor	Automotive / industrial	Embedded and firmware software, cloud and DevOps, QA and test automation, system engineering, ADAS, powertrain and vehicle architecture, robotics, cybersecurity, generative AI, SAP and S/4HANA
Custody-bank center	BFSI	FP&A, BI and reporting, general ledger and record-to-report, accounts payable
Life-sciences center	Healthcare & life sciences	SAP functional and technical (a genuine SAP competency center), customer and commercial operations, procurement, supply chain, sourcing, planning, collections, accounting, regulatory reporting, global clinical-trial activity, cybersecurity, application development, AI and data science
RCM operations (multiple)	Healthcare	Medical billing, payment posting, claims adjudication, AR follow-up, denial management, medical coding
EMS procurement center	Electrical & electronics	Procurement and sourcing, SAP, BI and reporting
Energy technology center	Energy & utilities	Process engineering, advanced manufacturing and automation, engineering design, AutoCAD, enterprise IT, digital transformation, OT cybersecurity
Flow-control center	Industrial	Engineering design, application engineering, procurement services, worldwide entity support, UI/UX, programme management, BI and analytics
Finance GBS center	Automotive	Accounts payable, accounts receivable, SAP – a finance shared-services center rather than an engineering one
Retail digital center	Retail	Application development and maintenance, test automation, data and analytics, data management, generative AI for development and testing, IAM, API development, cloud platforms

Takeaway | Two of the largest centers are finance and shared-services operations, not engineering - which is why 'Coimbatore is an ER&D city' needs qualifying. ER&D dominates the talent mix while the largest individual employers span embedded engineering, custody banking, life-sciences SAP and healthcare RCM. That spread is a resilience asset, not a dilution.

Source: Collabera GCC Research Desk

Collabera

GCC TALENT ANALYSIS

Skillset Heatmap: Job Family Depth Against Hiring Difficulty

Twelve job families on the Collabera GCC charter taxonomy - grouped the way a GCC scopes roles, not the way a job board classifies them

Job family	Share of city tech workforce (N = 32K+)	Depth (out of 10)	Hiring difficulty	What it means for a charter
Application & Product Engineering	8.3%	■■■■■■■■■■	High	Deepest family in the city. Anchor GCCs and the IT-services majors work the same pool.
Embedded, Industrial & Product R&D	5.6%	■■■■■■■	High	The city's differentiator. Contested, and concentrated around the anchor centers.
Project, Programme & Delivery Mgmt	5.3%	■■■■■■	Medium	First-line and mid management depth is genuine; global-mandate leadership is not.
Customer & Business Operations	5.0%	■■■■■■	Medium	Volume hiring is straightforward. Healthcare RCM fills faster here than anywhere in India.
Engineering & Technology Leadership	4.7%	■■■■■■	High	Available to Director level in software, healthcare and industrial; thin above that.
Enterprise Applications (SAP / ERP / CRM)	4.4%	■■■■■	Medium	A real local competency, anchored by an existing SAP competency center.
Data, Analytics & AI	3.7%	■■■■	High	Broad as a secondary skill, thin as a primary career track.
Quality Engineering, QA & Testing	3.0%	■■■■	Medium	Fastest-filling engineering function. A sound first charter for a new center.
Finance, Accounting & Shared Services	2.9%	■■■	Medium	AP, AR and R2R depth is general-purpose rather than domain-specialised.
Infrastructure, Cloud & IT Support	2.7%	■■■	Medium	Adequate depth; certification levels remain shallow, so plan internal enablement.
HR, Procurement & Enterprise Services	1.4%	■■	Medium	Sufficient for a captive back-office charter, not for a regional CoE.
Cybersecurity & OT Security	1.0%	■	High	The thinnest family. Plan Tier-1 sourcing or a remote-first structure.

Takeaway | Depth and difficulty are not the same axis. Application engineering is the deepest family in the city and still reads High on difficulty, because the IT-services majors and the anchor GCCs work the same pool. The two families that constrain charter design are cybersecurity and OT security at the bottom of the table, and engineering leadership above Director level.

Source: Collabera GCC Research Desk

Collabera

GCC TALENT ANALYSIS

Salary Analysis: The Cost Differential

Coimbatore CTC as a percentage below each peer city, computed on published band midpoints

Role / level	Below Bengaluru	Below Pune	Below Chennai
Software Engineer (3-5 yrs)	25%	23%	17%
Senior Engineer / Tech Lead (6-9 yrs)	24%	21%	16%
Engineering Manager (10-14 yrs)	25%	22%	15%
Director / Senior Director (15+ yrs)	28%	22%	17%
VP / GCC Head	33%	19%	12%
Data Scientist (4-7 yrs)	27%	23%	17%
Product Manager (5-8 yrs)	26%	23%	15%
QA / Test Automation (4-7 yrs)	23%	21%	15%

23%-38%

below Bengaluru across every role level

WHAT THE DIFFERENTIAL IS WORTH

Coimbatore delivers a 23–33% compensation advantage vs. Bengaluru across the roles analysed, averaging ~26%. The differential remains 19–23% vs. Pune and 12–17% vs. Chennai, giving GCCs a measurable structural cost advantage without moving away from Tamil Nadu

The differential narrows against Chennai 12-17% which matters because Chennai is the realistic alternative for a Tamil Nadu mandate, and it carries the same state policy.

Source: Collabera GCC Research Desk

Collabera

GCC TALENT ANALYSIS

Salary Analysis: The GCC Premium Over the City Rate

Annual CTC in ₹ lakhs per annum by function and experience band. GCCs pay above the city rate for engineering and AI talent, not for transactional functions

Function	Entry · 0-2 yrs		Mid · 3-5 yrs		Senior · 6-10 yrs		Leadership · 10-15 yrs	
	GCC	City	GCC	City	GCC	City	GCC	City
Engineering & R&D	**4.5 - 8**	3.6 - 6	**10.8 - 16.8**	6 - 10.8	**18 - 30**	8.4 - 13.2	**30 - 48**	24 - 36
IT & Digital Technology	4.5 - 7	4.8 - 7.2	**8.4 - 12**	7.2 - 12	**12 - 24**	13.2 - 18	**24 - 36**	21.6 - 33.6
Data, Analytics & AI/ML	**4 - 6**	3.6 - 6	**9.6 - 15.6**	4.8 - 8.4	**16.8 - 28.8**	8.4 - 13.2	**30 - 48**	24 - 36
Finance & Accounting	3 - 5	3.6 - 6	**5.3 - 7.9**	4.8 - 8.4	**9.6 - 12**	7.2 - 12	**19.8 - 23.8**	15.6 - 27.6
HR & People Operations	**4 - 6**	3 - 5.4	**5.3 - 7.9**	4.8 - 8.4	**9.6 - 13.2**	7.2 - 12	**15.6 - 21.6**	12 - 18
Supply Chain, Procurement & Ops	**4 - 6.5**	3.6 - 6	**6 - 8.4**	3.6 - 7.2	9.2 - 13.2	8.4 - 13.2	**16.8 - 21.6**	14.4 - 19.2
Customer & Business Ops (Shared Svcs)	**3.5 - 6**	3 - 5.4	**4.8 - 7.2**	3.6 - 6	**7.8 - 11.4**	6 - 10.8	12 - 18	12 - 18

WHERE THE PREMIUM IS CONCENTRATED

Engineering and R&D carries the entire premium story — from +38% at entry to well over +100% at the senior band. GCCs are paying decisively above the city rate to secure engineering talent, and the senior gap is where the bidding actually happens. Supply chain and shared services show a consistent mid-band premium.

WHERE THE EARLIER CLAIM DOES NOT HOLD

The claim that GCCs pay a premium "in almost every function" needs one correction, not the one originally flagged: Data, Analytics & AI/ML is not an exception - GCC bands there are at or above city rates at every experience level, with one of the widest premiums in this analysis (senior band: ₹16.8-28.8L vs. ₹8.4-13.2L). The real exception is narrower: at the leadership level (10–15 yrs) in Finance & Accounting specifically, the top of the city-wide range (₹27.6L) exceeds the top of the GCC range (₹23.8L) - meaning the most senior finance leadership candidates can command more outside a GCC than inside one. That is a genuine recruitment risk, but it's specific to senior finance leadership, not to AI/ML or data roles.

Source: Collabera GCC Research Desk

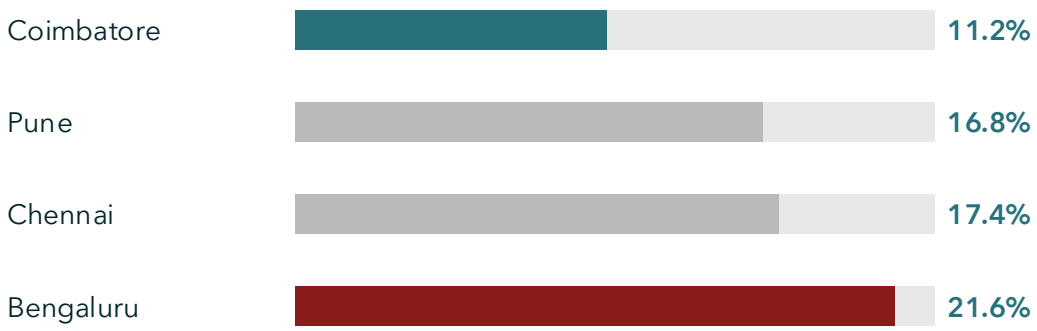
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GCC TALENT ANALYSIS

Attrition Analysis: The Structural Moat

Annual GCC attrition by city, and the four mechanisms behind Coimbatore's position

ANNUAL GCC ATTRITION RATE BY CITY



Senior-engineer attrition specifically runs 8-12% in Coimbatore against 18-22% in Bengaluru.

10.4

percentage points below Bengaluru

On a 200-person center that is roughly 21 fewer backfills every year. At a fully-loaded replacement cost of ₹3.5-5 lakh per hire, the attrition advantage alone is worth ₹73 lakh to ₹1.05 crore annually – before any productivity ramp-up cost, and before the compensation and real-estate differentials.

WHY COIMBATORE RETAINS TALENT BETTER - FOUR MECHANISMS

Commute under 20 minutes

Against 45-65 minutes in Bengaluru. Named the primary retention factor in employer surveys. Lower daily friction, lower flight risk.

Ownership culture

68% of local GCC employees report decision-making autonomy against 41% in Tier-1 cities. A smaller center means a larger role scope for the same person.

Cost-of-living edge

20% below Bengaluru – roughly 1.2× the purchasing power for the same CTC. Talent does not need to job-hop to grow real income.

Low poaching pressure

Fewer competing centers means far less unsolicited outreach. Employees are not fielding three to five inbound approaches a week.

Source: Collabera GCC Research Desk

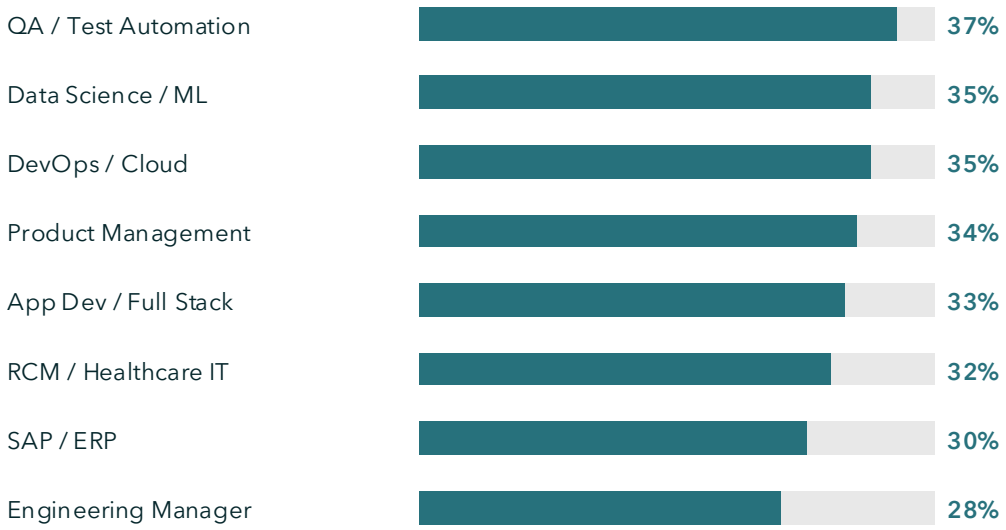
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GCC TALENT ANALYSIS

Hiring Velocity: Time-to-Fill and Market Throughput

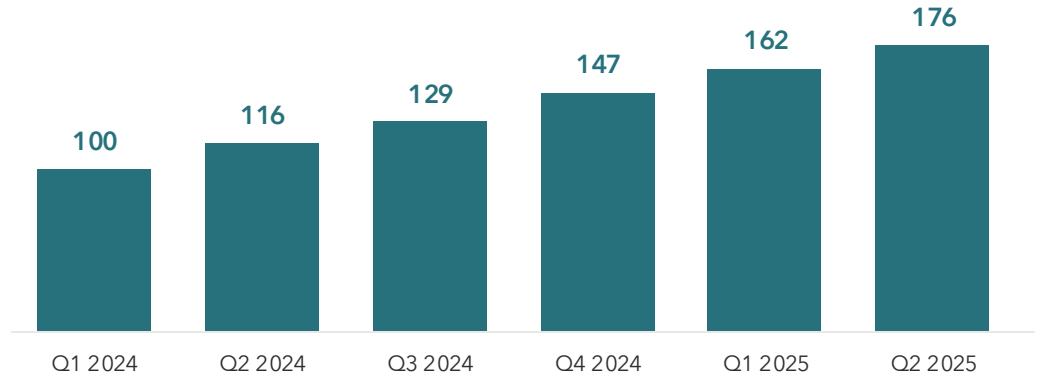
How much faster Coimbatore fills a GCC role than Bengaluru, and how fast the market itself is growing

TIME-TO-FILL – % FASTER THAN BENGALURU



Healthcare RCM is the fastest-filling function in the country. Engineering-manager roles close the gap – senior hiring is slower everywhere, and Coimbatore's advantage is smallest exactly where the bench is thinnest.

GCC JOB POSTINGS – INDEXED TO Q1 2024 = 100



+76% growth in GCC job postings over six quarters

LOOKING AHEAD TO 2026 — NOT YET MEASURED FOR COIMBATORE

National GCC hiring signals turned mixed through 2026 - some reports show continued growth, others a four-quarter plateau. Whether Coimbatore held its Q1'24–Q2'25 velocity through this window is the single most valuable number to add here once available.

OPERATIONAL READ

Faster fills are a direct consequence of lower talent competition, not of a larger pool. That advantage is consumable: each new center that opens tightens it. The cities that lost this advantage did so within roughly three years of a comparable inflection.

Source: Collabera GCC Research Desk (Q1 2024–Q2 2025 index); Everest Group 2025 GCC Talent Report; industry hiring-trend reporting, 2026 (mixed signals – not independently verified for Coimbatore)

Collabera

TALENT ANALYSIS

Talent Supply Against Demand: Where the Depth Is

Supply-to-demand ratio by skill. Above 1× means active supply exceeds current GCC demand

Skill / function	Supply : Demand	Signal	What it means for a hiring plan
Python / Data Engineering	5.0×	Abundant	Hire at volume with no premium. The deepest pool in the city.
Healthcare RCM / Revenue Cycle	3.9×	Strong	Volume hiring is straightforward; eight employers have already proven the pipeline.
QA / Test Automation	3.8×	Strong	Fastest-filling engineering function. Good first charter for a new center.
Java / Spring Boot	3.7×	Strong	Deep enterprise base, largely sitting inside IT-services firms.
SAP / ERP Implementation	3.6×	Strong	A genuine local competency, anchored by an existing SAP competency center.
Cloud / AWS / Azure	3.1×	Strong	Adequate depth; certification levels are still shallow, so plan internal enablement.
Machine Learning / AI tooling	2.9×	Strong	Available as a secondary skill. Do not plan on hiring pure specialists at volume.
Embedded Software / ADAS	2.1×	Moderate	Moderate and highly contested – the anchor center holds much of it.
DevOps / SRE	1.9×	Moderate	Moderate. Expect to compete on role scope rather than on pay.
Cybersecurity / InfoSec	1.6×	Moderate	Plan six-to-nine-month lead times, or source from Bengaluru and Chennai.
Product Management	1.4×	Tight	Tight. The weakest bench in the city at every level.
GCC Leadership (Director+)	0.3×	Deficit	Structural deficit. Cannot be hired at scale – it has to be grown or relocated in.

THE ONE DEFICIT THAT GOVERNS EVERYTHING ELSE

Every skill in this table is in surplus except leadership. Director-and-above demand across the 75+ centers runs roughly three times the available local bench.

Source: Collabera GCC Research Desk

Collabera

TALENT ANALYSIS

Who Else Is Hiring: The Competitive Employer Landscape

The services and consulting majors are the largest employers of the same talent, and they are the switch pool rather than the threat

MAJOR NON-GCC TECHNOLOGY AND PROFESSIONAL-SERVICES EMPLOYERS

TCS	Largest single technology employer in Coimbatore
Infosys	Large delivery center
Wipro	Mid-sized presence
HCLTech	Growing headcount
Cognizant	Stable presence, deep application-development base
L&T Technology Services	Engineering-services focus – the closest competitor for ER&D talent
IBM	Cloud, data and consulting roles – competes directly for the platform and cloud pool
EY	GCC advisory, technology consulting and managed services hiring
Deloitte	Consulting and technology delivery – the strongest pull-on mid-career analytics talent
Capgemini	Rapidly scaling - existing 900+ engineering center, plus a new ~1,500-seat facility opened ***(In Sep'26)***

WHY GCCS WIN AGAINST SERVICES AND CONSULTING FIRMS

Product ownership
GCC roles offer product ownership against project execution. The most-cited switch reason among mid-career local talent.

Global visibility
Direct interaction with global headquarters – a differentiated career signal against domestic delivery.

Compensation premium
12-18% above equivalent IT-services roles at senior levels; the gap narrows to 5-8% at entry.

Headcount-plan hiring
GCCs hire against headcount plans rather than project billings, which removes the bench and layoff cycle and lifts offer-acceptance rates.

REALITY CHECK

The largest IT-services employer in Coimbatore employs more people locally than a meaningful share of the entire GCC workforce, and the consulting firms now compete for the same mid-career analytics and cloud talent. GCCs are therefore not primarily competing with each other for volume roles – they are drawing from a very large services and consulting bench that actively wants product ownership. That is a structural recruitment advantage, and it is the reason volume hiring plans in this city are usually met.

Source: Collabera GCC Research Desk

Collabera

TALENT ANALYSIS

Fresh Talent Pipeline: Institutions and Graduate Supply

The replenishment engine: 250+ institutions producing 100K+ graduates a year, 50K+ of them engineers

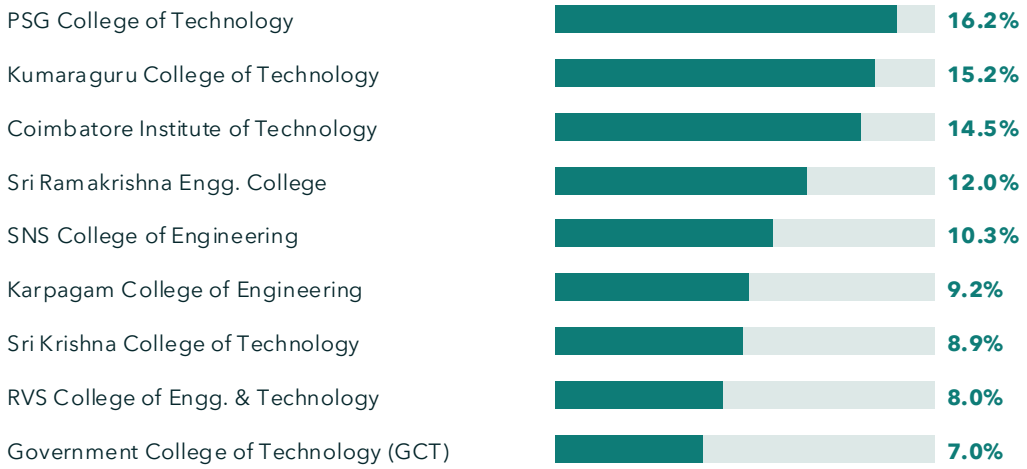
250+
Higher-education institutions
Including 100+ engineering colleges

100K+
Graduates a year
Second only to Chennai in Tamil Nadu

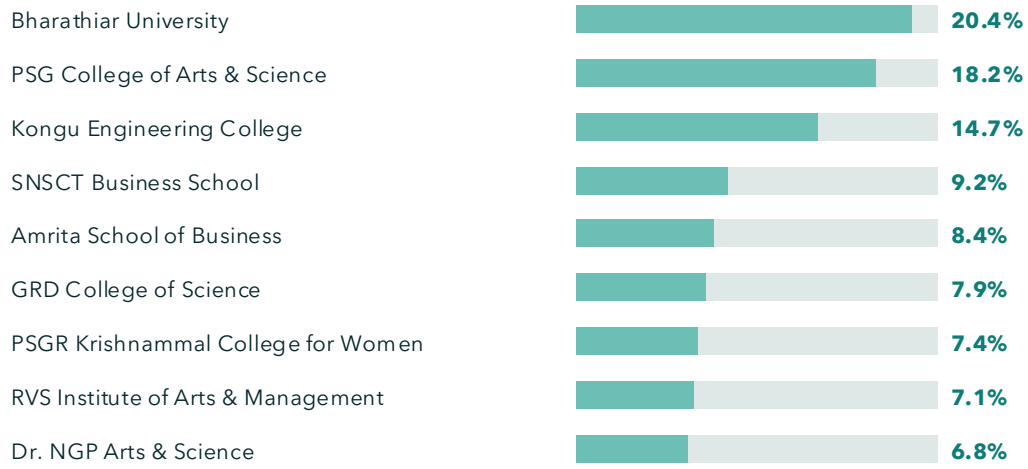
50K+
Engineering graduates a year
The supply side of the ER&D case

10+
Institutions in NIRF Top 200
Among the highest of any emerging city

TOP ENGINEERING FEEDERS, RELATIVE SCALE



ARTS, SCIENCE AND MANAGEMENT FEEDERS, RELATIVE SCALE



REALITY CHECK | New-age programmes in AI, data science, robotics, cyber-physical systems and cybersecurity are already live across the leading institutions and PSG-STEP, the Forge Innovation Hub, Amrita TIFAC-CORE and the RVS campuses run industry-facing skilling. What is missing is not programmes, it is named GCC co-design of curriculum. Cybersecurity is the clearest priority track: the thinnest job family in the city, and the one every industrial and energy charter now asks for.

Source· Collabera GCC Research Desk.

Collabera

TALENT ANALYSIS

Talent Signals: New-Age Skills + Day1 Ready Pipeline

Engineering and arts colleges now teach AI, data science, cybersecurity and quantum and large GCCs are shaping graduates to be productive from day one

38% **Women in GCC roles**

42% **Gen-Z share of GCC talent**

57% **Tier-1 senior talent open to relocating here**

NEW-AGE PROGRAMMES NOW LIVE IN COIMBATORE

Domain	Engineering colleges	Arts & Science colleges
AI, ML & Data Science	**PSG Tech:** BE CSE (AI & ML) and 5-year integrated M.Sc Data Science · **PSG iTech:** B.Tech AI & Data Science (120 seats) · **Amrita:** B.Tech AI & Data Science	Dr. N.G.P. Arts & Science - B.Sc AI & Machine Learning; KCLAS, SRCAS, HICAS, RVSCAS, DSRCAS, SKACS - B.Sc Data Science
Cybersecurity	**PSG Tech:** 5-year integrated M.Sc Cyber Security and ME Biometrics & Cybersecurity	Dr. N.G.P. - B.Sc CS with Cyber Security (intake 60) · AJK and CMS colleges - B.Sc Digital & Cyber Forensic Science
Quantum	**Amrita** (Coimbatore), Quantum Computing & Algorithms, a core course in B.Tech AI & DS, plus a quantum elective in M.Tech CSE · **PSG Tech:** Quantum-Safe Cryptography elective	Sree Ramakrishna College Of Arts and Science is currently working on launching Quant related courses from 2027

HOW GCCS BUILD DAY-1 READINESS

Bosch (BGSW)
Engineering scholarships for Coimbatore students since 2011; student hackathons on its Coimbatore campus; title sponsor of PSG Tech's Srishti symposium.

A global media GCC
Recruits from Kongu-belt colleges, runs a two-month structured internship, and hires 80-100 graduates a year straight into international client teams.

An AI supply-chain GCC
Academic partnerships feed a recruit → onboard → develop → deploy model, cited as the reason for its rapid capability ramp-up.

Campus incubators
PSG-STEP, Forge (Kumaraguru) and Amrita TIFAC-CORE run industry-facing skilling alongside degree programmes.

Takeaway

The courses are live; the alignment is not yet systematic. New-age programmes now run across both engineering and arts colleges, and several large GCCs already shape graduates through internships, hackathons and scholarships. The next step is formal curriculum co-design 2/3 anchor GCCs with PSG and Amrita as a named pilot.

Source: Collabera GCC Research Desk

Collabera

TALENT ANALYSIS

Migration Analysis: Outflow, Reverse Flow and Net Position (1/2)

Coimbatore's historic problem was graduate outflow. The 2026 evidence shows the direction reversing

The historic outflow

- For two decades the city produced engineers and exported them – primarily to Bengaluru and Chennai, drawn by GCC and product-firm charters that did not exist locally
- Reversing that outward migration was named as an explicit objective of the 2025 CII-CII Coimbatore blueprint, on the grounds that it drains a self-sustaining local economy
- The residual effect is visible in the pyramid: the 15-20 and 20+ bands are thinner than the entry bands would predict

The reverse flow now

- 57% of senior Tier-1 talent reports openness to relocating to Coimbatore – cost of living and commute are the stated drivers
- Reverse migration is a named talent source inside at least three anchor centers, and one cites it explicitly as its route to scarce specialist skills
- A 'return-to-city' pool professionals with Tier-1 GCC experience and family roots here is the single highest-value segment in the market
- The energy-technology anchor center reports roughly 10% annual workforce growth drawing on exactly this pool

The net read

- Inbound senior talent is now a real channel, but it is pull-based: it works when a credible mandate exists, and not otherwise
- Leadership transfer from Tier-1 centers remains a dependency, not a solved problem – two anchor centers still transfer leadership in from Pune and Bengaluru
- Lateral hiring into the city remains hard. Anchor centers consistently describe a home-grown strategy as a response to that difficulty, not as a preference
- The migration lever and the leadership lever are the same lever – see Section 07

IMPLICATION Coimbatore does not need to win a talent war to hit its 2030 numbers – it needs to convert a pull that already exists. The binding constraint on reverse migration is the availability of mandates worth returning for, which makes mandate attraction and talent strategy a single agenda rather than two.

Source: Collabera GCC Research Desk

Collabera

TALENT ANALYSIS

Migration Analysis: Outflow, Reverse Flow and Net Position (2/2)

Coimbatore's talent opportunity extends well beyond its local workforce – active job seekers across six major markets create an addressable pool for organisations building or scaling capabilities here.

227,000+ **Active job seekers across six major talent markets** *represent a potential Addressable Migratory Talent Pool for Coimbatore - an indicative figure based on current job-seeker activity, not confirmed relocation intent.*

Talent Market	Active Job Seekers	Core-Role Pool (3-8 yrs)	Leadership Pool (15-20 yrs)	Predominant Segments
Chennai	**141,000+**	37%	6%	Technology, BFSI, Automotive & Manufacturing, Logistics
Bengaluru	**60,500+**	41%	7%	Technology, GCCs, IT Services, Startups
Hyderabad	**11,700+**	39%	5%	IT Services & Consulting, Product, BPM, BFSI
Kochi	**7,400+**	35%	9%	IT Services, Consulting, BFSI
Pune	**4,100+**	38%	8%	IT Services & Consulting, Automotive
Mumbai	**2,300+**	33%	11%	BFSI, Technology, Professional Services
Total	**227,500+**	**~ 38%**	**~6%**	***Cross-industry, digitally enabled talent pool***

Absolute pyramid counts derived from stated city percentages – verify against source before circulating.

01
Deepest pool
Chennai alone contributes 141K+ active job seekers – the largest single source of migratory talent.

02
Technology-rich supply
Bengaluru, Hyderabad, Pune and Kochi offer talent already exposed to GCCs, IT services and product environments.

03
Coimbatore as a destination
With the right ecosystem, Coimbatore can pull experienced talent from larger metros, not just rely on local creation.

TAKEAWAY The opportunity is not just to retain Coimbatore talent, but to make Coimbatore a destination for talent currently concentrated in larger metropolitan markets.

Source: Collabera GCC Research Desk

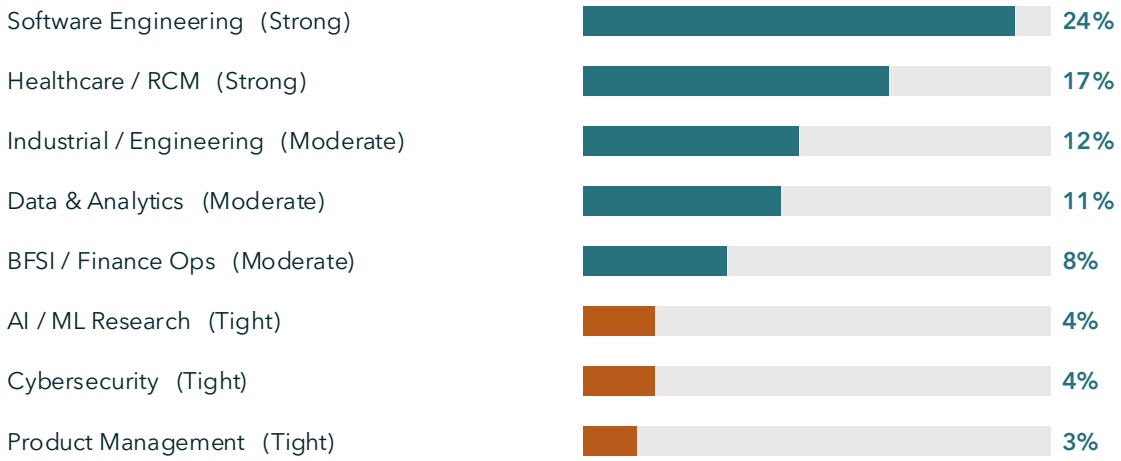
Collabera

TALENT ANALYSIS

Leadership Analysis: The Director & Above Bench

Share of the local Director+ bench by domain, and what it means for a hiring plan

SHARE OF LOCAL DIRECTOR+ BENCH, BY DOMAIN



8.3%

of the city's experienced base has crossed 20 years

And GCC talent already skews 15 points more senior than the city, so centers are competing for the same narrow slice, not a separate one.

HIRING GUIDANCE

Hire locally for software, healthcare and industrial Director roles the depth is proven, and local VP-level hires are on record in each. Plan Bengaluru and Chennai sourcing pipelines, or remote-first structures, for cybersecurity, AI/ML research and product management. Expect four-to-six-month fills for VP-level product roles.

THE EVIDENCE GAP THIS SECTION CLOSES

Only two centers are old enough

The 19-year embedded software anchor and the 15-year flow-control center are the only local operations that have had time to grow genuinely home-grown senior leaders. Both are worth asking directly what share of their leadership bench is Coimbatore-origin.

Demand runs roughly 3× supply

Director-and-above demand across 75+ centers against the available local bench is the sharpest deficit in the entire talent dataset.

This cannot be hired at scale

It must be grown. A sustained leadership platform now, structured peer and mentoring programmes by 2028, and a deliberate push to route global mandates through Coimbatore-based leaders by 2030.

Source: Collabera GCC Research Desk

Collabera

TALENT ANALYSIS

The AI-Ready Talent Pipeline

A broad, increasingly specialized AI talent base - already building dedicated AI teams inside Coimbatore GCCs today

N = 46K+

total demand-weighted mentions across 72 AI skills tracked

Depth Across the Modern AI Stack

Beyond the headline categories specific, current technologies already present at real scale citywide

Deep Learning	~10,000	Keras	~1,750
TensorFlow	~4,400	LangChain	~2,200
Computer Vision	~6,600	NLP	~7,100
PyTorch	~2,200	LLM	~5,200
Scikit-Learn	~5,400	Hugging Face	~1,100
Generative AI	~7,600		

Real GCC Roles, Not Just Signals

24 named GCCs already building dedicated AI/ML teams in Coimbatore

Bosch Global Software Technologies
AI Engineer, Gen AI Engineer, Data Scientist

Exterro
Senior ML Engineer, AI Software Developer

Blue Yonder
Data Scientist, AI Engineer

Also hiring dedicated AI/ML roles: Amazon (ML Data Associate), Publicis Sapient (Data Science Manager), Rappit & Responsive/RFPIO (AI/ML Engineer, AI & Agentic SE)

REAL USE CASE | Bosch's Coimbatore GCC already runs a dedicated GenAI Engineer role – agentic, multi-agent AI systems built with Lang Chain/Lang Graph, RAG, and MCP, deployed on GCP and Azure. This is current-generation GenAI engineering already live in the city, not early-stage experimentation.

Source: Collabera GCC Research Desk

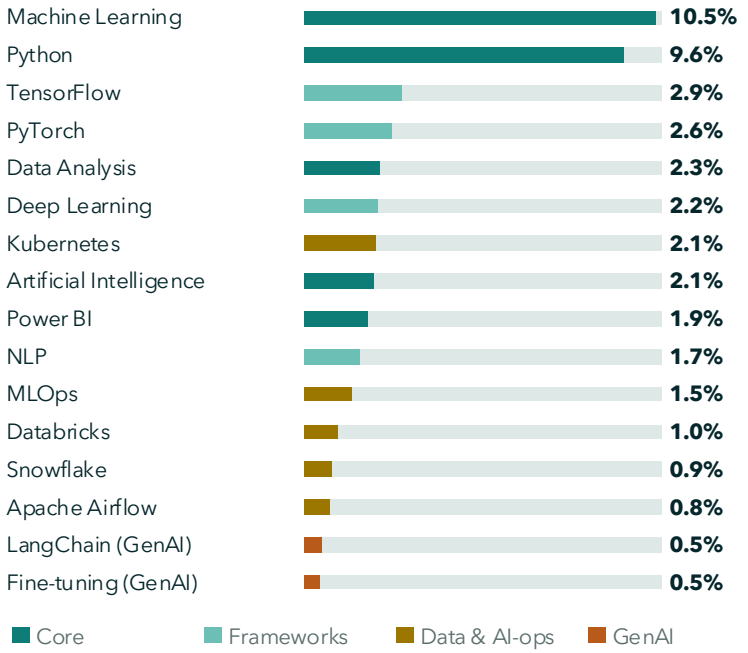
Collabera

TALENT ANALYSIS

AI Talent: Demand vs Supply

Coimbatore is deep where GCC demand is largest - Python, BI and core ML. What's thin is AI as a primary career track and advanced certification

HOT AI SKILLS - INDIA GCC DEMAND



N = 560K *total demand-weighted mentions across 72 AI skills tracked*

COIMBATORE SUPPLY - PROFESSIONALS WITH THE SKILL

27,298	Python
25,404	SQL / databases
9,408	Machine Learning
9,204	AI
9,171	Power BI
8,089	Data Science
7,578	Data Analytics
1,961	AI / DS as primary job

Only 21% of AI-skilled professionals hold AI or data science as their primary job - the skill is broad, the career track is thin.

GCC USE CASE - AI-LED SUPPLY CHAIN HUB

A US supply-chain software GCC chose Coimbatore over Bhubaneswar, Kochi, Ahmedabad, Visakhapatnam and Chandigarh to build AI-led supply-chain capability. The deciding factor was talent: engineering graduates and a strong 2-5 year pool. It builds AI skills on top of domain and customer-facing expertise through a recruit → onboard → develop → deploy model.

AI ROLES COIMBATORE GCCS ARE CREATING

- AI & data science inside the embedded-software and energy-technology anchors
- GenAI for software development and testing at the Belgian retail GCC
- AI, data science and automation within the life-sciences GCC's digital charter
- A visible AI career ladder: Data Scientist / ML Engineer → Senior Data Scientist / Analytics Manager → Head of Analytics / AI

Takeaway | The foundation is ready: Python, BI and core ML are held at scale, matching the largest demand lines. The gap is depth - only 1,961 professionals hold AI as their primary job, and advanced AI certification is rare. The next build is the frameworks and AI-ops layer: MLOps, Kubernetes, GenAI tooling, and streaming and observability skills such as Kafka and Grafana.

Source: Collabera GCC Research Desk, CII Coimbatore GCC Taskforce centre interviews; CII Coimbatore baseline study 2025

Collabera

TALENT ANALYSIS

Startup Talent Pool: The DeepTech Adjacency

A small but genuinely deep-tech startup ecosystem, and the incubator infrastructure behind it

200+

Tech startups

Verified technology startups in the Coimbatore ecosystem

40+

DeepTech startups

Roughly a fifth of the ecosystem is genuinely deep-tech

10+

Incubators & accelerators

PSG-STEP, Forge, Amrita TBI, AIC-KGiSL, CDIIC, SNS iHub

~20%

DeepTech share

High by emerging-city standards – the signal that matters for GCC adjacency

WHAT THE DEEP-TECH CLUSTER ACTUALLY BUILDS

Industrial IoT & manufacturing analytics

Real-time machine and production monitoring, Industry 4.0 deployment for process industries – directly adjacent to the Manufacturing 4.0 talent gap

Supply-chain traceability & compliance

Automated collection and validation of granular supplier data – a charter global retail and apparel GCCs actively need

AI-led screening, mobility & marketing

Employee screening and verification, AI transport optimisation, personalised marketing platforms

AI healthcare

An emerging cluster anchored by local health-tech founders, adjacent to the city's RCM employer base

THE INCUBATOR INFRASTRUCTURE

SNS iHub	India's largest non-profit startup campus; 14+ cohort programmes, 300+ mentors, 50+ investors, 100+ events a year; a seven-vertical by seven-technology innovation framework
PSG-STEP	Operating since 1998 – skilling and technology business incubation in automation, mechatronics and entrepreneurship
Forge (Kumaraguru)	Accelerator since 2015; hands-on skilling in emerging technology, design and problem-solving
Amrita TIFAC-CORE & TBI	Cybersecurity, IoT and medical-technology research and incubation
CODISSIA CDIIC	Defence innovation and Atal Incubation center, contributing to the Southern Defence Corridor

GCC Takeaway

The startup pool is too small to be a volume talent source, and that is not its value. Its value is threefold: a pipeline of founders and engineers with genuine deep-tech exposure, a ready set of pilot partners for GCC innovation charters, and an incubator network that can host industry-academia centers of excellence without new capital construction.

Source: Collabera GCC Research Desk

Collabera

TALENT ANALYSIS

Vertical White Space: RCM and Insurance BPO

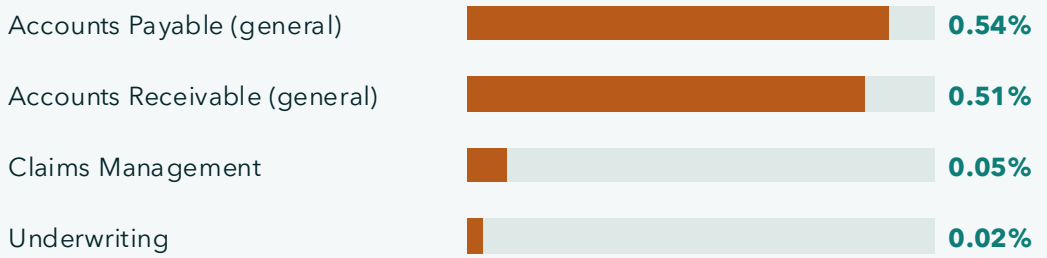
Five RCM GCCs are already at scale. Insurance underwriting and claims remain a genuine white space

RCM: ALREADY AT SCALE

Five named RCM GCCs hold 11.3% of total GCC headcount. Supply runs 3.9x demand, and roles fill roughly 32% faster than in Bengaluru. Medical billing, payment posting, claims adjudication, AR follow-up, denial management and medical coding all run here today, at employer scale.

Cotiviti (healthcare analytics) and Optum (healthcare services) add further depth adjacent to core RCM.

INSURANCE-BPO: THE GAP, AS % OF THE CANDIDATE BASE



Insurance accounts for under 1% of the vertical mix. Underwriting and claims management are rounding errors against the candidate base; accounts payable and receivable depth is general-purpose finance skill, not RCM-specific.

WHAT IS MISSING

No Coimbatore college or university has integrated RCM or insurance-BPO training into its curriculum in partnership with a GCC. Standalone medical-coding academies exist locally and feed the general RCM talent pool, but none link into a GCC hiring pipeline. Insurance-specific underwriting and claims training has no verified local presence at all.

2028 TO 2030 BET, NOT A 2026 PITCH

Use the five RCM employers as anchor tenants to co-design a targeted insurance-BPO skilling pilot. RCM itself needs no pitch, it already scales. Insurance underwriting and claims is the seed real enough to justify a pilot, not yet dense enough to lead an investor conversation with.

Source: Collabera GCC Research Desk

Collabera

TALENT ANALYSIS

Sector Deep-Dive: Aerospace, Defence & Space

A proven capability, a committed infrastructure push, and a talent pool that still needs to be sized — three different maturity levels, not one story

PROVEN CAPABILITY – OPERATING TODAY

LMW's Advanced Technology Centre (LMW-ATC) – AS9100B certified, NADCAP-approved; active partnerships with HAL, DRDO and ISRO.

Delivered: TEJAS Mk1A air intake assembly; GSLV/LVM3 payload adapters and composite structures for ISRO missions.

Facility: dedicated Aerospace Composites line since 2018; 10-metre structural machining; 25+ NADCAP/OEM-approved processes.

COMMITTED INFRASTRUCTURE & POLICY

Coimbatore is one of five nodes on the Tamil Nadu Defence Industrial Corridor (with Chennai, Hosur, Salem, Tiruchirappalli).

SIPCOT/TIDCO defence industrial park at Varapatti, Sulur – 350-420 acres planned, ~₹2,500 Cr expected investment, 99-year leases; a common engineering facility centre is planned with Tata Technologies.

TN Aerospace & Defence Industrial Policy (2022-Mar 2026) – 20-50% land-cost concessions; covers aircraft parts, drones, MRO, missiles, sensors, radar and space under one scheme.

EMERGING TALENT PIPELINE

Kumaraguru College of Technology runs a dedicated Aeronautical Engineering programme with named internship pipelines into HAL, NAL, ADA, ADE and DRDO.

SNS College of Technology has run a separate Aerospace Engineering department since 2020.

PSG College of Technology has ISRO-linked Space India Hackathon participation.

A Remote Pilot Training Organisation (drone-pilot skilling) has been launched in Coimbatore.

LEVERAGE THE NICHE RICH TALENT POOL

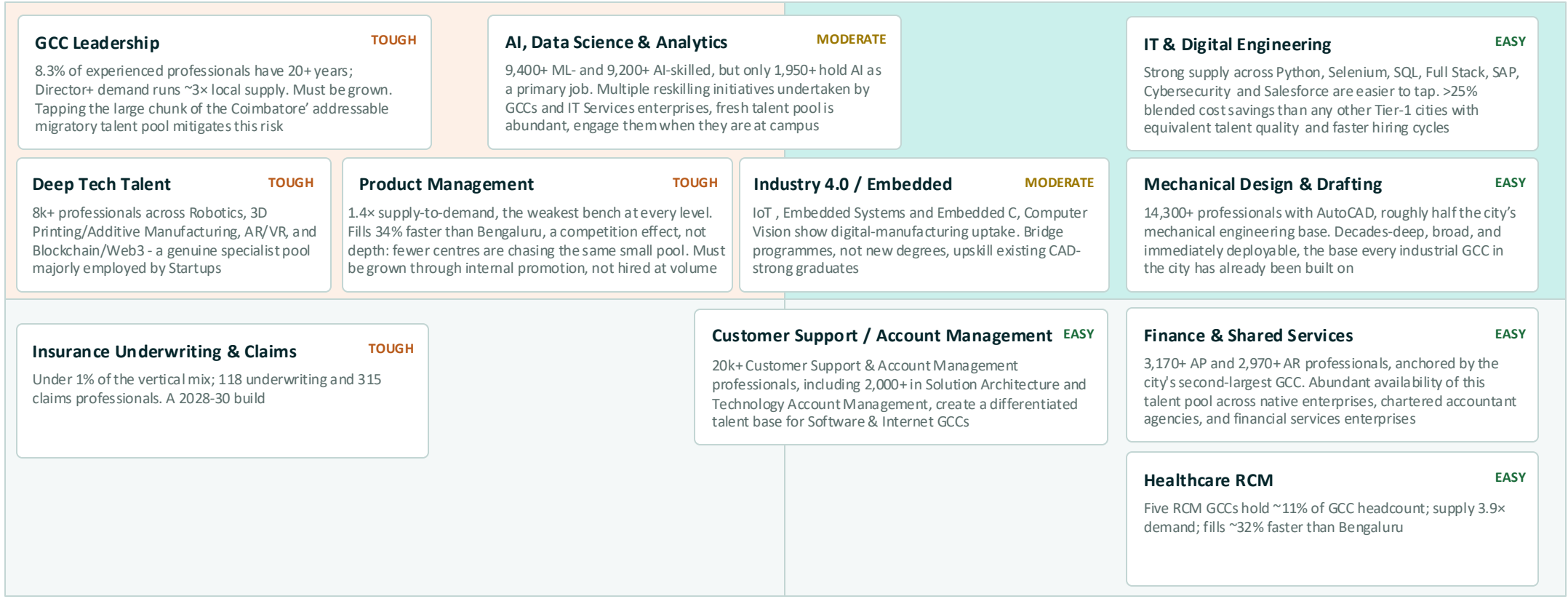
800+ specialised professionals already anchor Coimbatore's Aerospace, Defence & Space ecosystem, with talent across Design, Structures, Simulation and core R&D.
With established employers including LMW, PRICOL, ELGi Equipments, L&T, Chakradhara Aerospace and Petrus Technologies, Coimbatore offers a ready industry base for GCCs building specialised engineering capabilities.

Source: Collabera GCC Research Desk

TALENT ANALYSIS

Talent Ease-of-Build Matrix

Eleven talent pools placed by existing depth in Coimbatore against strategic value to the GCC ambition - every position backed by data



EASY = depth already exists · MODERATE = base exists, conversion needed · TOUGH = must be grown or seeded

Source: Collabera GCC Research Desk

Collabera

TALENT ANALYSIS · CASE STUDIES

How Coimbatore centers Actually Scaled

Four real journeys. Every one of them took between 15 and 19 years to reach mandate ownership

LIFE SCIENCES · US-HEADQUARTERED

From a 15-person back-office pilot to the group's largest global location

- 2007 – 15-person pilot on transactional work
- 2012 – 300+ people, primarily back-office operations
- 2015 – Tier-2 status with expanded functional scope
- 2019 – Tier-1 strategic center with enterprise-wide responsibilities
- Today – the company's largest global location at roughly 12% of its global workforce

Now runs customer and commercial operations, procurement, supply chain, collections, regulatory reporting, global clinical-trial activity, cybersecurity, application development, automation and data science across five regions.

Succeeded on: deep talent availability, the academic ecosystem, cost competitiveness, leadership transformation and reverse migration for specialist skills. Open challenges: advanced AI and digital skills, European-language capability, AI/ML curriculum modernisation.

AI SUPPLY CHAIN · US-HEADQUARTERED

Chose Coimbatore over five other cities to build an AI-led capability hub

- Shortlist: Bhubaneswar, Kochi, Ahmedabad, Visakhapatnam, Chandigarh and Coimbatore
- Deciding factor was talent – specifically high-quality engineering graduates and a strong two-to-five-year professional pool
- Also weighed: academia-industry linkages, proximity to Bengaluru, learning agility, ecosystem partnerships
- Fastest-growing center in the city at +81% year on year

Built capability in sequence: customer-facing experts, professional skills, process excellence, technology and AI skills, product and solution knowledge, then supply-chain domain expertise – recruit, onboard, develop, deploy.

Succeeded on: engineering talent, leadership transfer from Bengaluru, academic partnerships, rapid ramp-up and a strong learning culture. Open challenges: the academic-to-corporate skill gap, limited senior and niche talent, Tier-2 perception barriers.

Source: Collabera GCC Research Desk

Collabera

TALENT ANALYSIS · CASE STUDIES

Engineering Depth and Long-Term Commitment

The two centers that prove Coimbatore can hold complex, specialized global mandates

ENERGY TECHNOLOGY · FRENCH-HEADQUARTERED

From an engineering-services hub to a strategic energy GCC - 20+ years in the city

- Entered via acquisition, establishing the Coimbatore foundation
- Core engineering support and services
- Scaled mechanical and design engineering
- Expanded enterprise IT delivery across the enterprise
- Enabled digital transformation and automation
- Now runs OT cybersecurity and advanced, higher-value mandates

The company's second-largest India GCC. Roughly 10% annual workforce growth, drawn from engineering graduates, experienced laterals, returnee professionals and the Bengaluru-Pune ecosystem.

Succeeded on: deep engineering and domain expertise, fresher pipeline depth, cost efficiency, high retention and the ability to scale into complex mandates. Open challenges: local leadership talent is less abundant, and the center still depends on Pune for leadership transfers.

MACHINERY & EQUIPMENT · CANADIAN-HEADQUARTERED

From a 2011 greenfield to a planned global center of excellence

- 2011 greenfield launch
- Built the engineering base: design and application engineering
- Integrated the regional ecosystem: procurement, suppliers, manufacturing
- Scaled steadily across nearly 15 years
- Next: a global center of excellence for end-to-end customer solutions

Current mandate spans engineering design, application engineering, procurement services and worldwide entity support. The plan is to roughly double the GCC team over 18-24 months and move to global solutions ownership.

Why Coimbatore: a multi-disciplinary engineering pipeline, early academia partnerships, a deep manufacturing and supplier ecosystem, workforce stability. Open challenges: connectivity is the largest single issue, plus middle-management and senior-leadership gaps.

Source: Collabera GCC Research Desk

Collabera

TALENT ANALYSIS

What GCC Leaders Say About the Talent

Talent is the common thread. Connectivity and the senior bench are the common caveats

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 worst best-kept secret. The decision of whether Coimbatore is a core office or a +1 office has a significant impact. Coimbatore is a great choice for a +1 office for its distinct advantages. 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 quality of people and the spread across multiple job functions, this allowance gave us to sandbox and test waters in no-time, something no other Indian city could enable. However, getting a lateral hire for certain roles is still 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.

GCC Site Leader, Coimbatore

LEADERSHIP TAKEAWAY Three independent center heads converge on the same two points: local talent quality is better than the city's external reputation suggests and the two things holding the ecosystem back are international air connectivity and the difficulty of lateral senior hiring

Source: Collabera GCC Research Desk



06

Government Policies for GCCs

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POLICY

Tamil Nadu GCC Policy 2024-27: The Headline Instrument

India's first payroll-linked captive incentive, capped at the first 50 GCCs and naming Coimbatore explicitly

CORE BENEFITS AND CONDITIONS

Payroll subsidy	30% in Year 1, 20% in Year 2, 10% in Year 3, on salary above ₹1 lakh per month
Eligibility	Forbes Global 2000 and Fortune 1000 companies; exceptions may be approved by the Inter-Departmental Committee
Cap	The first 50 GCCs only a first-mover instrument by design
Scheme period	1 April 2024 to 31 March 2027
Infrastructure support	Dedicated assistance for GCC setup, with Coimbatore and Madurai named alongside Chennai as priority destinations
Stated state target	Attract and support 50 GCCs during the policy period

WORKED EXAMPLE – ILLUSTRATIVE

A 200-person center at an average ₹1.5 lakh per month

≈ ₹3.6 Cr	≈ ₹2.4 Cr	≈ ₹1.2 Cr	~ ₹7.2 Cr
Year 1	Year 2	Year 3	Total

Set against a 33-38% compensation differential and a 20% lower cost base, the subsidy is the accelerant rather than the reason.

WHY THE TIMING IS THE MESSAGE

The cap and the end date convert a standing incentive into a closing window. For the CII taskforce this is the single sharpest argument available in investor conversations through 2026 – and it needs a named-account pipeline behind it to be usable, which is the first action in Section 07.

OUR RECOMMENDATION

THE LEADERSHIP SEEDING GRANT

A state-funded relocation incentive for senior GCC leaders who move from a Tier-1 hub to establish or lead a Coimbatore centre – a 25% reimbursement of the leader's annual CTC, paid directly to the enterprise, vesting after 12 months in the role.

Source: Collabera GCC Research Desk, Government of Tamil Nadu

Collabera

POLICY

The Wider Tamil Nadu Incentive Stack

Five further policies that a GCC in Coimbatore can draw on, alongside the GCC Policy

Policy	Core benefits and incentives	Relevance to a Coimbatore GCC
ICT Policy 2018	Capital subsidy of ₹30 lakh to ₹1.5 Cr per unit, scaled by investment (₹5 Cr to ₹500 Cr). Additional 50% subsidy for setups in ELCOT parks and SEZs in A and B districts, 25% in C districts. Electricity tax exemption for 2-5 years on investment-based slabs.	The main capital instrument. Coimbatore's ELCOT and TIDEL-anchored corridors qualify for the enhanced subsidy tier.
R&D Policy 2022	50% reimbursement of eligible fixed assets for innovation labs, up to ₹1 Cr. 25% for product testing and prototyping facilities. 50% reimbursement of IP costs for patents, copyrights, trademarks and GI registration. 50% land cost rebate up to 20 acres, capped at ₹50 lakh per acre.	Directly supports the center-of-excellence and innovation-lab model that the engineering-led positioning depends on.
Data center Policy 2021	50% land subsidy in Category-C districts capped at ₹2 Cr for up to 10 acres. 50% stamp duty concession in A and B districts on ELCOT, SIPCOT and SIDCO land. 100% electricity tax exemption for 5 years.	Relevant to any center planning on-premises compute or an edge data facility.
FinTech Policy 2021	₹5 Cr start-up seed grant fund; ₹20 Cr earmarked from the Emerging Sector Seed Fund; 1 Mn sq. ft. of FinTech City space with interconnectivity across cities.	The route in for BFSI captives, which is currently the widest open runway in the vertical mix.
Life Sciences Promotion Policy 2021	Land concessions of 10% in A and B districts and 50% in C districts; SGST refund on capital goods in five annual instalments; 5% interest subvention on term loans for up to six years.	Relevant to the healthcare and life-sciences vertical, already the second-largest by GCC headcount.

PRACTICAL NOTE The instruments are individually sound and collectively unmapped. No single document tells a prospective investor which combination applies to their charter, district and investment size – producing that map is a low-cost, high-conversion action for the GCC Council.

Source: Collabera GCC Research Desk, Government of Tamil Nadu



07

Recommendations - The Path to 2030

Collabera

RECOMMENDATIONS

The GCC Maturity Staircase

Most existing centers sit at stages one to three. Helping each climb one step is worth more than several new logos

STAGE 1

Pilot / +1 Location

- Small teams
- Initial mandate
- Execution-oriented work
- Local reporting

STAGE 2

Focused Team

- Defined capability
- Limited functions
- Established delivery
- Some process ownership

STAGE 3

Specialist Center

- Multiple capabilities
- Higher-value mandates
- Domain expertise
- Regional support

STAGE 4

Center of Excellence

- Multi-functional CoE
- Best-practice owner
- Advanced tools and IP
- Leadership bench

STAGE 5

Global Hub

- Large scale
- Global mandate ownership
- Strategic decision-making
- Drives innovation

TWO NAMED CLIMBS: HOW BOSCH AND SLB MOVED UP THE STAIRCASE IN COIMBATORE

BOSCH GLOBAL SOFTWARE TECHNOLOGIES · Automotive and industrial · Coimbatore since 2007 · 19 years to Stage 4

2007 · ENTRY	BUILD-OUT	BY 2019	TODAY	NEXT STEP
Chosen from a 20 > 6 > 3 city shortlist as Bosch's second India site and BCP for Bengaluru	Own campus in CHIL-SEZ; hiring across electrical, electronics and CS; campus scholarships from 2011	Almost every Bosch business area also being developed in Coimbatore, well beyond back-up work	Embedded, ADAS, powertrain and cybersecurity, plus a live GenAI engineering team	Own a global product or platform mandate end-to-end from Coimbatore

SLB · Energy technology · 20+ years in Coimbatore · now entering Stage 4

ENTRY	BUILD-OUT	2023	TODAY	NEXT STEP
Entered Coimbatore through an acquisition, starting with core engineering support and services	Scaled mechanical and design engineering on the city's manufacturing talent base	Enterprise IT delivery at scale; new Coimbatore IT Center, SLB's first after its rebrand	Digital transformation, automation and OT cybersecurity; SLB-SREC elastomer test lab with academia	Global ownership of energy-transition or OT-security mandates from Coimbatore

WHAT THIS MEANS FOR THE RAMP-UP AGENDA

Both anchors needed about two decades to reach Stage 4, and each step was unlocked by the same levers: a committed campus pipeline, owned infrastructure, academic partnerships and parent trust earned one mandate at a time. None of these has to be left to chance. If the ecosystem pre-builds them, the next wave of centers should not need 20 years for the same climb.

OTHER COIMBATORE CLIMBS

Life sciences GCC: 18 years to global hub
Flow-control GCC: 15 years, CoE planned
AI supply-chain GCC: <3 years, still climbing

Source: Collabera GCC Research Desk

Collabera

RECOMMENDATIONS

The Path to 2030: A Three-Year Sequence

Scale what already works, then build the convergence and leadership layers, then prove it with mandates

NOW → 2027

Mobilise · scale what already works

- Establish the GCC Council and delivery office; define roles, processes and operating rhythm
- Build the named-account list across the 5Rs and assign relationship owners
- Route more of the existing IT and engineering volume toward product and platform roles rather than only adding headcount
- Launch the first Manufacturing 4.0 bridge cohort with named industrial partners
- Map GCC-ready office capacity, mobility and connectivity; identify and prioritise the gaps

Year-end milestone: one council, one pipeline, one scorecard.

2027 → 2029

Convert · build the convergence and leadership layers

- Stand up the AI and data-science center of excellence; convert a secondary-skill base into a primary career track
- Launch a sustained GCC leadership platform, with structured peer forums and mentoring by 2028
- Pilot a targeted RCM and insurance-BPO skilling programme anchored on the eight confirmed employers
- Convert priority accounts into visits, proposals, pilots and center launches; secure the first wave of expansions
- Package expansion-ready sites; ensure plug-and-play readiness

Year-end milestone: a first wave of conversions and mandate expansions.

2029 → 2030

Scale · prove it with mandates, not headcount

- Track the share of Coimbatore GCCs running global or leadership mandates rather than delivery
- Route global mandates deliberately through Coimbatore-based leaders
- Expand the pipeline using success stories and peer referrals; drive new logos and expanded mandates
- Build infrastructure capacity ahead of demand; improve international connectivity
- Publish an annual GCC scorecard and impact report

Outcome: a repeatable GCC growth engine, on a credible trajectory to 150.

THE STRATEGIC TEST

By 2030 Coimbatore should be able to demonstrate not only that more GCCs operate in the city, but that global enterprises entrust it with products, platforms, engineering decisions and specialist outcomes. That is the shift from an emerging destination to a scaled capability hub.

Source: Collabera GCC Research Desk

Collabera

RECOMMENDATIONS

Talent Priorities: Ranked by Leverage

The nine talent pools from the Ease-of-Build Matrix, what each needs and when it pays back

Theme	Difficulty	The intervention	Owner	Payback
IT & digital engineering	EASY	Coordination, not creation. Route existing volume toward product and platform roles; the base already supports both higher-value work and continued headcount growth.	GCCs + CII	Now to 2027
Mechanical design & drafting	EASY	Package the AutoCAD-trained base directly into industrial GCC onboarding. This talent needs deployment, not development.	GCCs + industry partners	Now to 2027
Finance & shared services	EASY	Publish standard AP, AR and R2R role ladders so native enterprises, CA firms and financial-services employers feed GCC shared-services hiring directly.	GCCs + CII	Now to 2027
Healthcare RCM	EASY	Scale the proven model. Five RCM GCCs already hire at pace; codify their onboarding playbook for new entrants and adjacent BPO charters.	CII + employers	Now to 2027
GCC leadership & global capability	TOUGH	Cannot be hired at scale, it has to be grown. Start now, since it takes longest: a sustained leadership platform, structured peer and mentoring programmes by 2028, and a deliberate push to route global mandates through local leaders by 2030.	GCC Council + anchor GCCs	Now to 2030
Industry 4.0 / embedded	MODERATE	Bridge programmes, not new degrees. Upskill existing mechanical and electronics graduates into IoT, PLC and SCADA, co-run with the named industrial employers.	Academia + industry partners + TNSDC	Now to 2028
AI, data science & analytics	MODERATE	A dedicated AI and data-science centre of excellence, the highest-leverage single intervention available. Convert a secondary-skill base into a primary career track before Tier-1 hubs absorb the ambitious end of it.	Universities + GCCs	2027 to 2029
Product management	TOUGH	The weakest bench in the city at every level and too thin to hire at volume. Build a rotation from senior engineering and domain talent instead of relying on external hiring.	GCC Council + anchor GCCs	2027 to 2029
Insurance underwriting & claims	TOUGH	A targeted skilling pilot anchored on confirmed RCM and insurance-BPO employers. Real enough to justify a pilot, not dense enough to lead an investor pitch with.	CII + employers + academia	2028 to 2030

SEQUENCING LOGIC

Do the easy things first, they fund credibility: IT, mechanical design, finance and Healthcare RCM are already at scale. Do leadership earliest of all, since it takes longest and every other theme eventually runs into it. Do product management and insurance underwriting last: both are genuine 2028-30 builds, not near-term pitches.

Source: Collabera GCC Research Desk

Collabera

COIMBATORE

Not an emerging story. An active one.

The ecosystem is compounding

75+ centres and 32K+ professionals, roughly 3× the installed talent base of two years ago. About a third of all centres are under 24 months old.

The talent is engineering-led and stable

62% of GCC talent in ER&D at the FY2024 baseline, grown at least 2× since, and lower GCC attrition than Bengaluru, Chennai or Pune. Mechanical engineering is the city's largest single skill.

The economics are unambiguous

A cost index of 70 against Bengaluru's 100, roughly a third faster time-to-fill, and a payroll subsidy that closes in March 2027.

One constraint governs the rest

Leadership. Director-and-above demand runs roughly three times local supply, and it cannot be hired at scale. Everything in the 2030 plan is downstream of fixing that.

Coimbatore is the answer to the question every CXO is asking, where do we build next, without starting from zero.

A CII Coimbatore GCC Taskforce Report · Collabera GCC Practice · September 2026

Collabera

ANNEX

Sources, Definitions and Data Notes

Every figure in this report traces to one of the sources below

PRIMARY SOURCES

- Collabera GCC Research Desk – Coimbatore GCC and talent mapping, September 2026 (primary basis for all talent shares in this report)
- Collabera – The Coimbatore GCC Decision Index 2026, Parts 1-7
- Collabera – Coimbatore GCC Talent Deep-Dive 2026 and Coimbatore GCC Talent Landscape 2026
- CII Coimbatore GCC Taskforce – Leapfrog 2030: The Road to 250 GCCs (5R growth framework, delivery system, center case studies and leadership interviews)
- CII Coimbatore – Coimbatore Rising: A New Blueprint for GCC Expansion, July 2025 (FY2024 industry-association baseline)
- NASSCOM GCC Tracker 2025 and NASSCOM IT Sector Report 2024
- LinkedIn Company Data and LinkedIn Talent Insights, September 2026
- Naukri JobSpeak Index – GCC job-posting volumes and time-to-fill
- Industry office-market and office-cost benchmarks, 2025-26
- Government of Tamil Nadu policy documents · AICTE intake data · NIRF 2024 · Census of India · National Crime Records Bureau · CII Coimbatore

DEFINITIONS

Global Capability center: an offshore unit established by a multinational to perform strategic technology, engineering or operations functions, including shared-services centers. Excluded: service providers and integrators, staffing companies, pure-play sales entities, and professional-services firms operating a dual in-house and third-party model.

GCC units: multiple physical centers operated by one company across locations. Mid-market GCC: a capability center of an enterprise with global revenue between USD 100 million and USD 1 billion. Emerging cities: Coimbatore, Kochi, Indore, Jaipur, Chandigarh, Ahmedabad, Vadodara, Thiruvananthapuram, Nagpur, Mysuru, Mangaluru, Madurai, Visakhapatnam, Goa and similar.

DATA NOTES AND LICENCE

This report publishes no absolute talent counts. Every talent figure is a percentage of a stated base. Only two absolute counts are carried: 75+ active GCCs and 32K+ GCC professionals.

No third-party licensed dataset is reproduced. Where an external benchmark informs a figure, it is cited as an industry or association benchmark rather than as a proprietary extract.

Seven items required a judgement call before publication; the basis for each is recorded in Section 01.

Open before external release: the non-technical skill shares, pending a LinkedIn and Naukri re-pull, and the all-sector startup count. Figures marked indicative are derived rather than directly observed.

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Thank You

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