



Final Report – Feasibility Study on Establishing GCCs in Kerala

July 2026



Contextualize Kerala in the Global and National GCC Landscape

Assess Kerala's Current and Emerging Readiness

Evaluating the long-term viability of emerging cities in Kerala - Kannur, Kozhikode, Thrissur, and Kollam.

Kerala's GCC Vision 2030, Critical Tenets, and Big Bets

Key recommendation on GCC policy, way forward, and suggested steps to mitigate challenges.

Detailed Location Comparison Study Output – Kerala vs. Peers

Detailed Policy Analysis

Case Studies – Other Top Tier 2 Hubs



1. Macro-Level GCC Market Landscape
1. Kerala's Strategic Advantages and Value Propositions
1. Top Industries Benefitting from Kerala's Ecosystem
1. Kerala's GCC Vision 2030
1. Key Recommendations and Way Forward
1. Addendum
 - a) Location Comparison Study
 - b) Policy Analysis Summary
 - c) Long-Term GCC Viability analysis - (Kannur, Kozhikode, Thrissur, Kollam)
 - d) Case Studies – Coimbatore, Ahmedabad, and Mysuru

Macro-Level GCC Market Landscape



Wholly owned, integrated, strategic platform typically established in talent rich locations (such as India) for significantly enhanced value.

Integrated

Companies can set up & operate a GCC to access global top-talent and build differentiating business capabilities.



Enhanced Value

Enterprises that partner with experts to successfully set up & operate GCCs in offshore locations see significant enhancement in time to value.



Strategic Platform

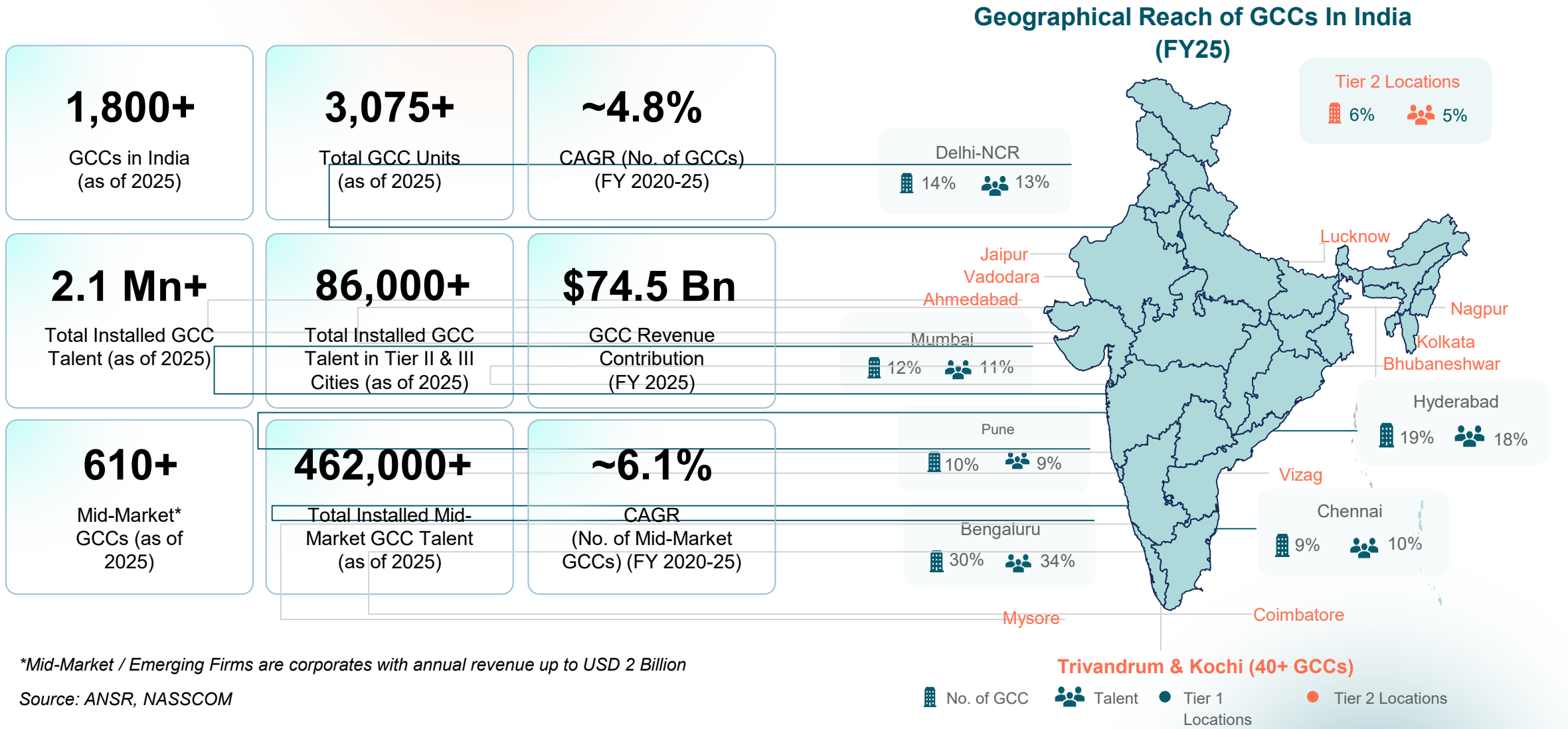
GCCs have evolved into centers of excellence driving enterprise growth, transformation and innovation agenda.



Wholly Owned

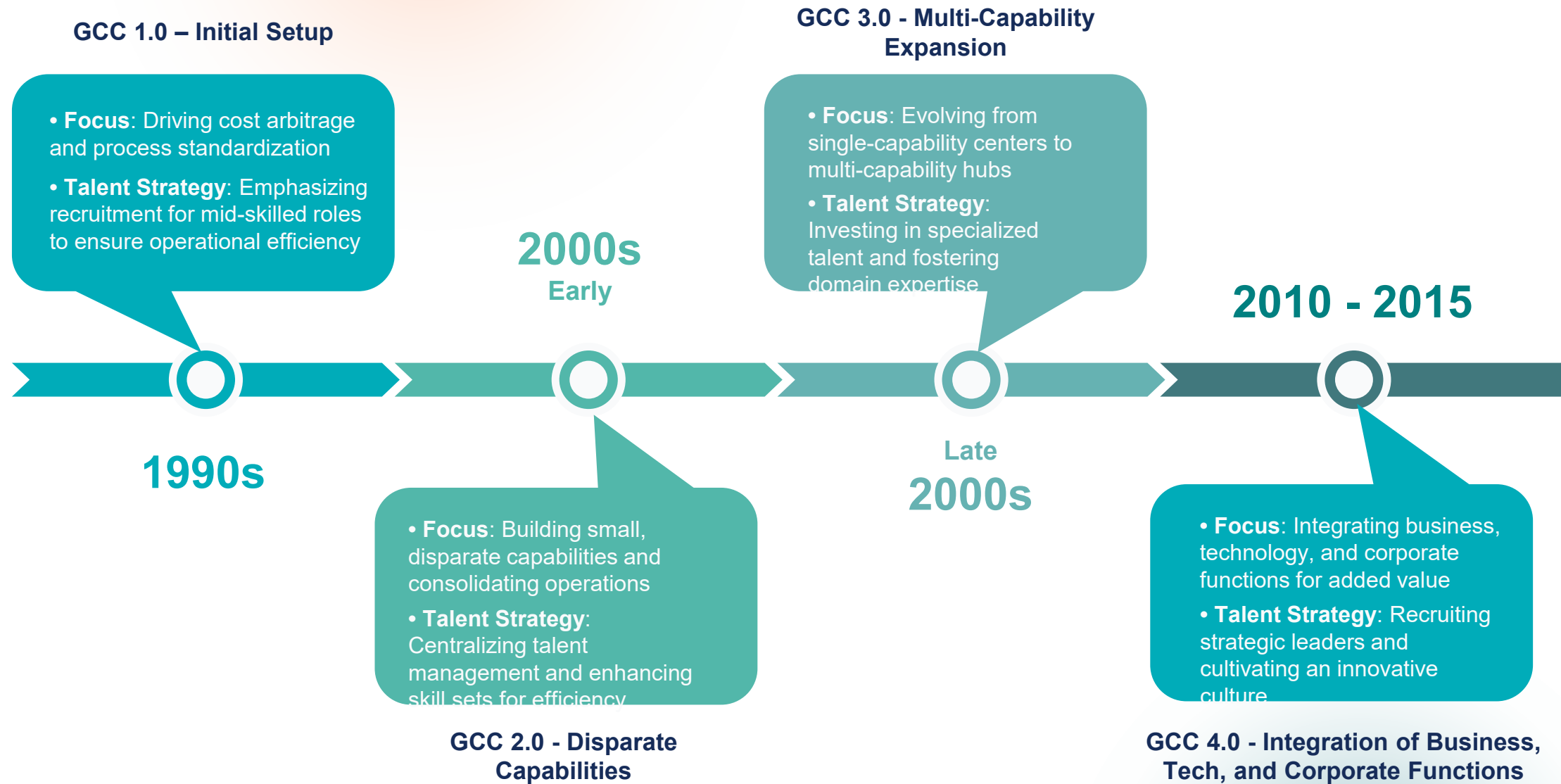
GCCs are a mainstream strategy to establish new business capabilities, gain efficiencies and optimize costs.

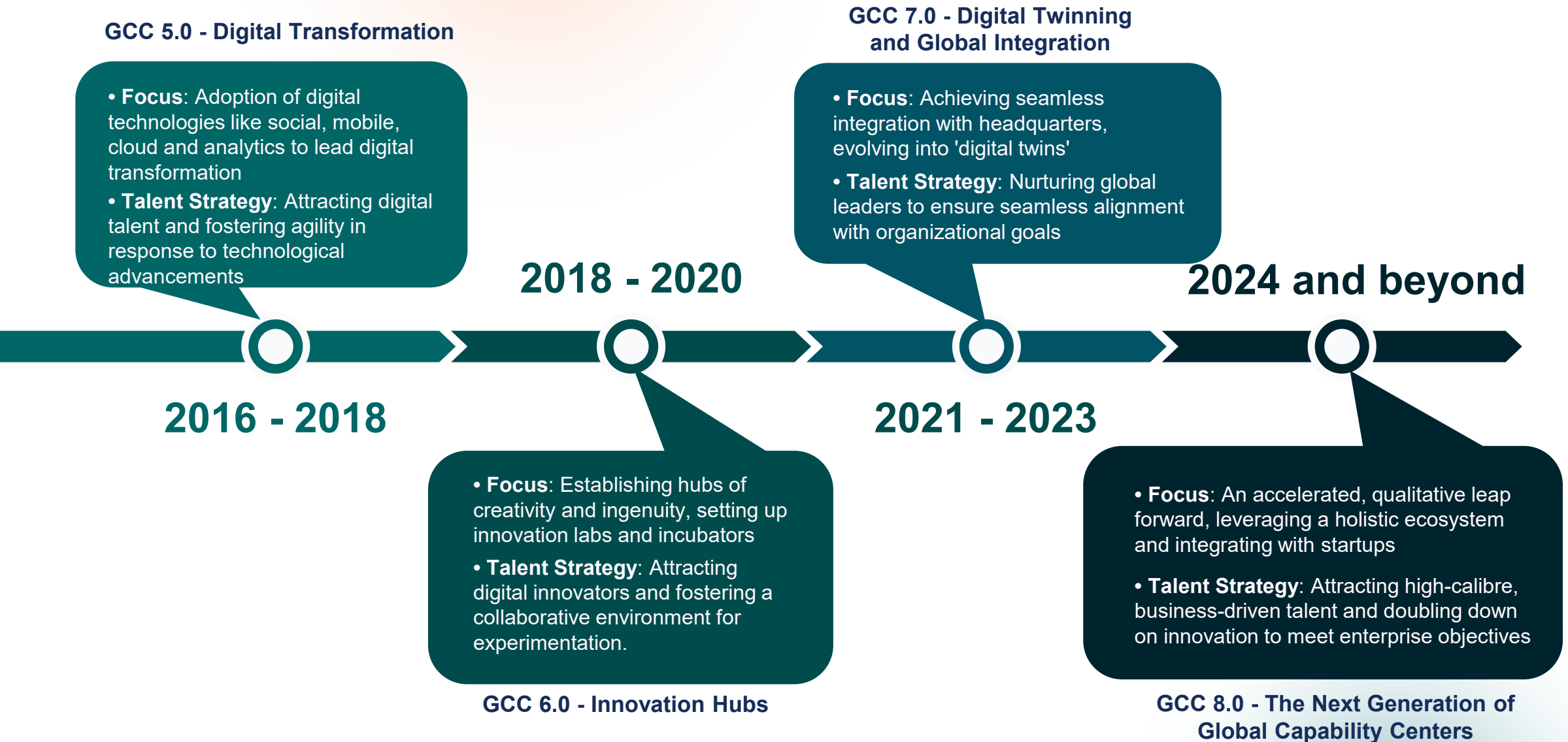




*Mid-Market / Emerging Firms are corporates with annual revenue up to USD 2 Billion

Source: ANSR, NASSCOM







1

GCC is the Enterprise: A New Paradigm for Global Operations

GCCs now operate as fully integrated strategic entities driving innovation, global competitiveness, and transformation. With advanced tech, strong leadership, and top talent, they influence strategy, culture, and end-to-end enterprise growth.

2

GCCs as AI Talent Powerhouses to Meet Global Demand

GCCs are becoming global AI hubs, attracting and upskilling talent in machine learning, analytics, and automation to power enterprise-wide transformation, accelerate decision-making, and enable scalable AI-driven innovation.

3

Beyond Tech: GCCs Evolve into Multifunctional Hubs of Expertise

GCCs are expanding beyond technology into multidisciplinary expertise, hiring professionals across healthcare, engineering, legal, and finance to drive specialized innovation and address complex global, industry-specific challenges.



4

Best-Sourcing: The Strategic Advantage in the Future of GCCs

Best-sourcing blends GCC and MSP capabilities, balancing in-house strategic functions with outsourced operations to accelerate transformation, enhance innovation, optimize resources, and enable flexible, scalable global delivery models.

5

GCC for all - Emerging Enterprises Lead the Way

Emerging and PE-backed enterprises (mid-market firms) increasingly establish micro-GCCs to drive digital transformation, access talent beyond metros, scale rapidly, and leverage India's growing innovation and delivery ecosystem.

6

GCCs in Non-Metro Hubs: A New Frontier

The emergence of GCC-specific policies offer attractive incentives and a conducive business environment, encouraging GCCs to expand beyond metro hubs. By focusing on non-metro hubs, GCCs leverage lower operational costs, access untapped markets, and build a strong local presence.



Challenges faced by matured hubs and how emerging hubs are increasingly becoming an attractive destination.

Talent saturation and high attrition in matured hubs

The current market scenario in mature hubs is characterized by a saturated talent landscape with intense competition and high attrition rates of 25–30%.

Tier 2 and 3 cities offer better access to talent due to limited competition and lower attrition rates compared to mature hubs.



Increasing operational costs

Since COVID, the matured hubs have seen a 30–35% rise in talent costs and 50% rise in cost of renting a Grade A office space.

Talent and Grade A office costs are 25–30% lower than Tier 1 hubs in the emerging cities.



Highly stressed city infrastructure and living standards



Mature hubs face limited real estate availability, along with rising congestion and strained infrastructure for power and water, constraining further expansion.

Emerging hubs offer modern real estate developments near city centers, along with improved commute options and new infrastructure initiatives driven by state governments.



Limited incentives to companies in matured hubs

Mature hubs now offer limited incentives for setting up centers, with tax exemptions in SEZs and STPIs being gradually discontinued, reducing their overall attractiveness for new investments.

Emerging hubs provide attractive incentives for companies to establish GCCs.



1. Vendor Supported Models

Owned GCC

An Owned GCC is a fully in-house, wholly owned entity established by a parent company to build long-term, strategic capabilities. The global enterprise sets up and operates the center directly, owning the legal entity, infrastructure, talent, processes, IP, and delivery outcomes end-to-end.

Fully owned GCC Assisted/Virtual Model

An Assisted or Virtual GCC model is an operating approach where a company establishes a capability center using a local partner for on-ground support, while retaining full ownership of the business functions, IP, and work delivery.

Joint Venture (JV)

Involves a global company partnering with a local enterprise, technology firm, or institutional investor to co-create and jointly operate a capability center. Instead of setting up a wholly owned subsidiary, the GCC is formed as a shared-ownership entity.

Build Operate Transfer

In the BOT model, a third-party service provider sets up and operates the GCC on behalf of the enterprise for an agreed period. After the initial phase, ownership and operations are transferred to the parent company.

Employee Transfer

At the end of the BOT period, the employees working in the partner-run center are moved onto the payroll of the parent (global) company

Entity Transfer

The entire BOT partner's local entity, its legal structure, employees, infrastructure, contracts is transferred to the global company at the end of the BOT period

2. Bootstrapped Model

Under a bootstrapped GCC model, companies establish and scale their centers independently, leveraging internal capital and capabilities to manage everything—from infrastructure build-out to talent acquisition. Although this approach demands higher upfront investment, it offers full control over culture, operating standards, and long-term growth pathways.

3. Acquisition Model

For organizations seeking rapid expansion, acquiring an established local company offers immediate access to talent, infrastructure, and customer or partner networks. The acquired unit can be seamlessly integrated into the global operating model, benefiting from the parent organization's systems, governance, and expertise.

4. CoE Model

Involves a company setting up a specialized capability hub, often in partnership with a local university, research institution, or innovation ecosystem to build deep, niche skills and test new capabilities. Instead of launching a full-scale center, the company begins with a focused innovation lab, R&D pod, or capability-specific unit that serves as an incubation point for future expansion.

Kerala's Strategic Advantages and Value Propositions



96.2%

Highest Literacy
Rate in India

Rank 1

Ease of Doing
Business
Rankings (BARP
Rating)

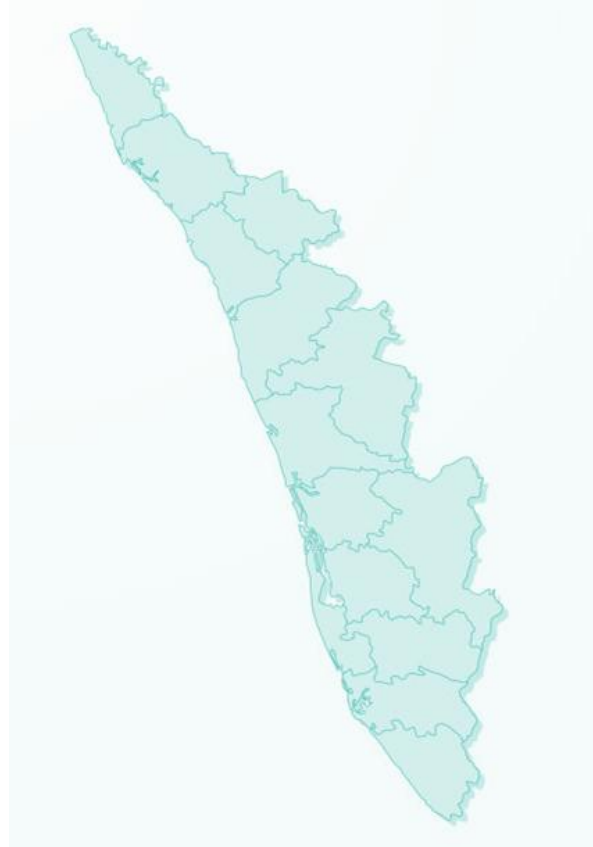
Rank 1

Top ranked state on
civic behavior, public
safety, gender
attitudes, and
diversity (by India
Today)

~50%

**Urbanization
as of 2025**

Fastest-urbanizing
state in India, with
projections of 96%
of its population will
live in urban areas
by 2036



**Rank 1 –
Quality of Life**

Kerala holds top rank in
Human Development
Index (HDI) among Indian
states

**Sustainable
Growth**

Ranked among top
states in SDG
performance; India's
best in health,
education, and social
indicators

**Inclusive
Growth**

Highest female
literacy and among
the highest female
workforce
participation in
southern India

**Equitable
Growth**

Growth hubs
distributed across
Kochi,
Thiruvananthapuram,
Kozhikode; strong
regional balance

Rank 2

In India's '10 Most
Welcoming Regions'
list (Annual Traveller
Review Awards for
2025)



190K+

Experienced Professionals
in Technology, IT services,
& IT Consulting

75,000+

Active talent base In niche
sectors like AI, Data Science,
Cybersecurity, Analytics, etc.

62,000+

Active Software
Engineers in the state

190+

Colleges offering
engineering programs

75,000+

STEM Graduate
Annually



Leader in Higher Education

- IIT Palakkad; NIT Calicut ranks among India's top engineering institutes
- IIM Kozhikode is in the top three management schools
- Top NIRF Ranked Colleges - Kerala University, CUSAT, University of Calicut
- Other Top Key Institutions - Indian Institute of Science Education & Research (IISER), Indian Institute of Space Science & Technology (IIST), Rajagiri, Amrita University (Kochi & Kollam), IIM Kozhikode (Kochi Campus), Thangal Kunju Musaliar Deemed to be University (Kollam), and many more

Vibrant Tech & Innovation Ecosystem

- Kerala Startup Mission anchors a statewide network of incubators and mentors
- 6,900+ startups supported over the last decade

Digital University Kerala (DUK) – India's first Digital University

DUK is a pioneering institution dedicated to transforming the digital education scenario of the State. Through its pioneering programs like DACE and global collaborations with leading universities, DUK is equipping students with future-ready skills while nurturing empathy-driven innovation.



Kerala is emerging as a deep-tech and digital innovation hub, driven by strong government support, a skilled talent pool, and growing industry-academia collaboration.

Presence of Top Global Firms Across Industries

**Non-Exhaustive List*



R&D / Innovation Ecosystem

1. Life Sciences and Biomanufacturing



Aims to create a hub for biotechnology, nanotechnology, and life sciences research and manufacturing

2. Aerospace & Defense

- Kerala–Defence Innovation Zone (K-DIZ)
- ISRO and VSSC presence

3. AI & Robotics



Zoho's R&D campus

4. Electronics System Design and Manufacturing



Focuses on electronic design, IoT, robotics, wearables, and other deep-tech hardware products.

Robust Start-up Ecosystem

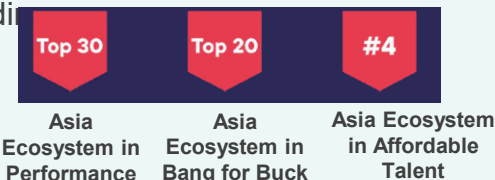
Kerala Startup Mission (KSUM)



Achievements:

- Helped register over 8100 startups; Provided over 10 lakh square feet of incubation space
- 63 incubators; Enabled over \$676 million in fundi

Global Recognition



Leading Successful



Building Tomorrow's Workforce Through Next-Gen Tech Skilling



Digital University Kerala (DUK)
Digital-focused university offering programs in data science, AI, and cybersecurity.



ICT Academy of Kerala (ICTAK)
Builds ICT skills to improve employability and bridge industry skill gaps.



ICFOSS
Provides training, internships, and academic programs in Free and Open-Source Software.



ASAP Kerala
Enhances employability through skill development for students and job seekers.



K-DISC
State innovation body promoting AI, robotics, and Industry 4.0 initiatives.



Trivandrum



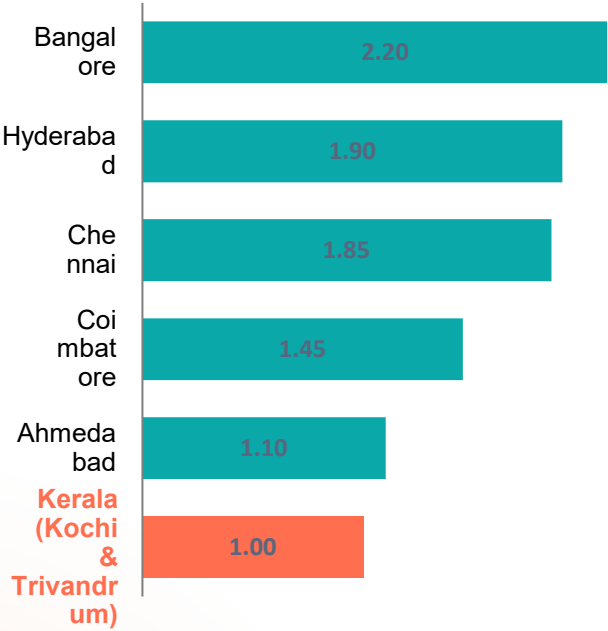
Kochi





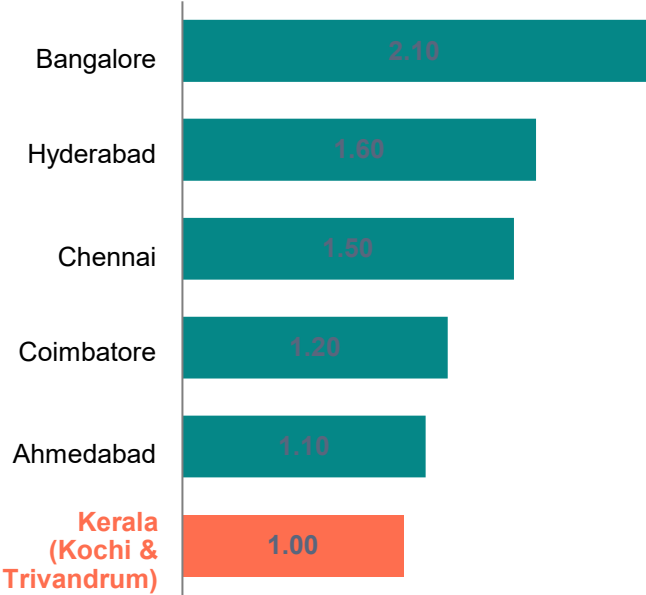
Kerala has low salary and office rental costs; has low talent attrition compared to other major hubs

Kerala offers low Grade A office rental rates



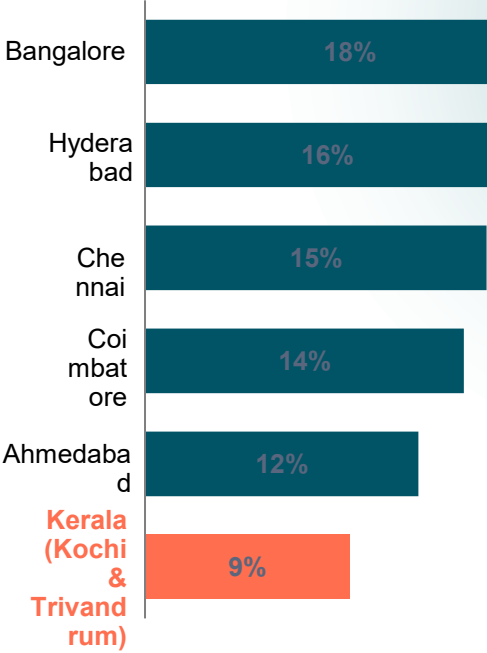
Kerala offers **economical** Grade A office space compared to top Tier 1 and Tier 2 hubs

Kerala has low salaries comparatively (average salary of a software engineer)



Kerala offers a more **cost-efficient** salary structure than Tier 1 and Tier 2 hubs

Attrition rate in Bangalore is 2X of Kerala



Attrition in Kerala is **lowest** compared to other major hubs



COST OF LIVING

Lower Cost of Living: Kerala offers a significantly lower cost of living compared to major Indian metros, enabling companies to operate efficiently while providing employees with a high quality of life.

Low Daily Expense: With housing, transportation, and daily expenses markedly more affordable than major tech hubs, Kerala enables 20–40% lower living costs for professionals, translating into higher real incomes and improved lifestyle outcomes.



EDUCATION

Literacy Achievement: Kerala boasts highest literacy rate of 96.2%, highest in India.

International Curriculum Presence: Kerala hosts early adopters of Cambridge/IB curricula (e.g., Trivandrum International School, Cochin International School) and a growing number of international-school options in major cities.



HEALTHCARE FACILITIES

Robust health system: Kerala has a strong public health footprint and a dense network of government & private hospitals; the state runs numerous NQAS-certified primary & secondary facilities.

Medical education & workforce: Multiple government medical colleges and well-established nursing/paramedical institutes supply skilled health professionals.



ENVIRONMENTAL QUALITY & POLLUTION

High forest & tree cover: Kerala's forest & tree cover is substantial— a meaningful environmental advantage.

Air Quality: Kerala's (specially Trivandrum and Kochi) air quality is generally considered good to satisfactory compared to other major Indian cities



URBAN INFRASTRUCTURE

Smart city investments: Kochi, Trivandrum have active Smart Cities projects focused on urban services, public-infrastructure upgrades and control/command centres. Traffic situation in Trivandrum and Kochi are rated one of the best in India.

Port & logistics upgrades: Vizhinjam International Seaport is operational in phases and poised to become a deep-water transshipment gateway



SHOPPING & ENTERTAINMENT

Mega malls & retail: Kerala hosts major retail destinations (LuLu International Mall) with hundreds of stores, multiplexes and food courts, creating modern lifestyle ecosystems.

Cinema & live entertainment: Multiplex chains and cultural festivals in all major cities supply broad entertainment choices for residents.



PARKS & RECREATION

Urban green assets: Sanctuary and several municipal parks provide city green lungs and easy weekend escapes.

Weekend getaways: World-class hill and beach destinations (Munnar, Thekkady, Alleppey backwaters, Kovalam, Varkala, Athirappilly) are within a few hours of Kerala's major cities — a strong lifestyle pull for professionals.



DINING & NIGHTLIFE

Dining diversity: Kochi and Trivandrum offer an expanding mix of fine dining, cafés and international cuisines (hundreds of listed restaurants spanning local, Pan-Indian and global menus), anchored by large retail & hospitality nodes.

Leisure & evening economy: Destination malls, waterfront restaurants (Fort Kochi, Marine Drive) and hotel bars are driving higher-end dining and modest nightlife growth.



Trivandrum

Kochi

Kozhikode

IT Infrastructure and Tech Parks

- **Government IT Parks:** Technopark Phases I, II, III and STPI (located in Technopark campus)
- **Private:** Technocity and Leela Infopark (located inside Technopark)
- **Major Upcoming Projects:** Emerging Technology Hub, Digital Science Park, Kerala Space Park, QUAD Project

- **Government IT Parks:** Infopark Phase I & II, I By Infopark, KINFRA Hi-Tech Park
- **Private:** SmartCity Kochi – Lulu IT Park, Lulu Cyber Tower 1 &, Brigade World Trade Center 2 (located inside Infopark)
- **Major Upcoming Projects:** Infopark Phase III (500 acres) - Cyber Valley Project, AI-Native City

- **Government IT Park:** Cyberpark, Kinfra Techno Industrial Park
- **Private IT Park:** UL Cyberpark, HiLITE Business Park
- **Major Upcoming Projects:** New IT hub development planned. Promoting IT and IT-enabled services in the Malabar region of Kerala.

of IT Companies

- **500+** IT/ITeS firms.
- 20+ established GCCs
- Experienced Professionals in Technology, IT services, & IT Consulting: **~55,000**

- **582+** IT/ITeS firms.
- 20+ established GCCs
- Experienced Professionals in Technology, IT services, & IT Consulting: **~75,000**

- **82+** companies
- Experienced Professionals in Technology, IT services, & IT Consulting: **~22,500**

Top Academic/Colleges and Inflow of STEM Graduates Annually

- Indian Institute of Space Science and Technology, College of Engineering Trivandrum, APJ Abdul Kalam University, Trivandrum University College, and many more

- Model Engineering College, XIME, SCMS Cochin, CUSAT, Amrita University, IIM Kozhikode (Kochi Campus), Rajagiri, and many more
- Annual STEM Graduate: **~25,000**

- IIM Kozhikode, NIT Calicut, Government Engineering College, Calicut University, and more
- Annual STEM Graduate: **~15,000**

Connectivity / Transport

- Annual STEM Graduate: **~22,000**
- Trivandrum International Airport
- Vande Bharat Express Train
- Upcoming/ongoing Metro projects, Kerala Coastal Highway, Outer Ring Road, Airport Expansion, etc.

- Cochin International Airport
- Kochi Metro (Line 1 operational, Phase 2 under development) + Water Metro
- Seaport + well-connected NH66 & NH544
- Ongoing urban infrastructure upgrades

- Kozhikode International Airport
- NH66 six-lane expansion ongoing
- Significant coastal and rail connectivity improvements

Affordable Housing & Residential

- Multiple premium & mid-segment projects
- **Rental:** INR 10K–18K for 1,000 Sq Ft apartment

- Strong supply of mid–premium residential stock
- **Rental:** INR 12K–22K for 1,000 Sq Ft apartment

- Emerging mid-segment residential clusters
- **Rental:** INR 8K–15K for 1,000 Sq Ft apartment



GCC Location Requirement	Kerala's Strength / Value Proposition	Status
Talent Availability & Quality	• Strong base of digital & STEM talent; highest literacy; English proficiency; low attrition • Strong network of institutions • KSUM, IIITM-K, Kerala Digital Academy, etc, working to create skilled talent pipeline	 Strong
Talent Scalability	• Emerging skill ecosystem • Need for deep upskilling programs in business & digital leadership	 Growing
Operating Cost Advantage	• 25–30% lower Grade A space rental and labour costs vs. Tier-1 cities • Substantial savings in total cost of ownership (TCO)	 Strong
Commercial Infrastructure	• State-of-the-art IT parks with certified spaces (Technopark, Infopark, etc.) • Stable, reliable power grid with redundancy for 24/7 operations • Upcoming / Under-developments project pipeline and land availability	 Strong
Policy & Ease of Doing Business	• Proactive GCC policy, single-window system, and industry-led governance. • Strong emphasis on digital governance and investor facilitation • Flexible labor laws and ease of doing business	 Strong
Public Infrastructure & Accessibility	• 3 international airports • Developing City Infrastructure Projects (Vizhinjam Port, Outer Ring Road, Metro expansion)	 Developing
Ecosystem Depth	• Presence of incubation network and start-up ecosystem • Early-stage innovation maturity • Needs scale-up capital and large GCC anchors.	 Developing
Social & Living Environment	• High quality of life, safety, healthcare, and sustainability • Cosmopolitan infrastructure in clean, green, culturally rich environment • Low cost of living compared to metro cities • Ideal for family relocation and long-term retention	 Strong

Top Industries Benefitting from Kerala's Ecosystem



1 Technology & Software

Kerala's Value Proposition

- **Strong digital foundation:** Digital technologies cut across all industries, with Kerala growing as a hub for AI, cloud, data analytics, and cybersecurity.
- **Talent-focused programs:** G-Tech MuLearn, DUK and ICTAK specialize in AI, blockchain, cybersecurity, etc. helping talent skill in emerging tech.
- **Deep-tech infrastructure support:** State-backed Deep Tech Clusters and GPU clustering reduce capital costs for AI/ML-intensive companies.

Presence of Talent

- **190K+** active professionals in Technology, IT services, & IT Consulting across Kerala
- **25K+** experienced professionals in AI (Kerala aims to train/skill 125,000 professional in AI by 2030)
- **62K+** active software engineers in Kerala
- Presence of experienced professionals in Cybersecurity, Cloud, and Blockchain technologies

Presence of Top Global Firms



2 BFSI

Kerala's Value Proposition

- **BFSI is the largest and most mature GCC domain in Kerala**, focusing on specialized centers and large-scale shared services across domains like insurance, core banking, Risk Management, Financial Analytics, Risk analytics, etc. Functions.
- Kerala is ideal for GCCs focusing on fintech solutions, risk management, compliance, financial analytics, and back-office operations for global financial institutions.

Presence of Big 4s and top consulting firms Presence of Talent

- **110K+** active professionals in Finance & Accounting Domains
- **Top Skillsets** - Financial accounting, tax accounting, management accounting, cost accounting, loan underwriting, credit underwriting, insurance underwriting, commercial underwriting, loans origination, loan servicing, investment banking, investment strategies, investment research, investment portfolios, etc.

Presence of Top Global Firms



3 Transportation, Maritime, & Logistics

Kerala's Value Proposition

- This domain is strategically linked to Kerala's coastal geography and its massive infrastructure investments such as Vizhinjam & Cochin Port projects.
- Indian Maritime University (Kochi) and Kerala University of Fisheries and Ocean Studies (KUFOS) offer specialized programs in supply chain, port and shipping management, naval architecture, and ocean engineering.
- Adani Ports is developing a 70-acre logistics park in Kochi with 1.3 million sq. ft. of integrated logistics facilities.

Presence of Talent

- **25K+** active professionals in Transportation & Logistics Sector
- **Top Skillsets** - Supply Chain Management, Supply Chain Optimization, Supply chain Operations, Supply Chain Consulting, SAP Supply Chain, Logistics Management, Integrated Supply chain Management

Presence of Top Global Firms





4

Healthcare & Lifesciences

Kerala's Value Proposition

- Kerala is emerging as a life-sciences manufacturing and innovation hub through Bio 360 Life Sciences Park and MedSpark, alongside strong healthcare tourism and tertiary care capacity.
- Advanced degrees in Bioinformatics, Clinical Research Management, and Biomedical Engineering, capitalizing on Kerala's strong medical education base.
- Kerala Medical Technology Consortium (KMTC) is a flagship initiative to build a strong ecosystem for medical innovation, R&D, entrepreneurship, and manufacturing.

Presence of Talent

- **48K+** active professionals in Healthcare & Lifesciences domain
- **Top Domains** - Health-tech, medical analytics, clinical research support, and pharmaceutical R&D support.

Presence of Top Global Firms



5

Oil & Gas

Kerala's Value Proposition

- Kerala's oil & gas ecosystem spans downstream refining and terminals, midstream pipelines and logistics, and emerging upstream offshore exploration in the Kerala-Konkan basin.
- A steady supply of B.Tech/M.Tech graduates in electrical, electronics, instrumentation, and chemical engineering from NIT Calicut and CET, supported by specialized diploma programs.
- Kinfra Petrochemicals Park, a ₹1,900-crore project at Ambalamugal, Kochi (with BPCL), is nearing completion, creating a hub for value-added chemical and digital solutions.

Presence of Talent

- **25K+** active professionals in Oil & Gas Sector
- **Top Skillsets** - Onshore oil and gas operations, Upstream oil and gas, Oil and gas drilling, Offshore oil and gas operations, Downstream oil and gas, Petroleum refining

Presence of Top Global Firms



6

Aerospace & Defense

Kerala's Value Proposition

- Rooted in Trivandrum, Kerala is the cradle of India's space program, offering a unique ecosystem for aerospace and defense GCCs focused on mission-critical systems, launch technologies, embedded systems, and defense electronics.
- Kerala Spacepark (KSPACE) is a dedicated industrial park offering incentives like capital subsidy, SGST reimbursement, low-interest loans, and streamlined clearance to attract private sector space technology firms.

Presence of Talent

- **5K+** active professionals in Aerospace & Defense Sector
- Indian Institute of Space Science & Technology (IIST), a premier institution hosts specialized engineering courses focusing on structural analysis, avionics, and embedded systems.

Presence of Top Global Firms





7 Hospitality & Tourism

Kerala's Value Proposition

- Kerala is a premier tourist destination, generating a unique GCC opportunity in digitalizing the high-end hospitality and travel industry. GCCs focus on digital platforms, global booking engines, revenue management systems, and customer experience (CX) analytics.
- Leading institutes specializing in Hotel Management and Tourism Studies, including Institute of Hotel Management and catering technology (IHMCT Kovalam) in Thiruvananthapuram

9 Media & Entertainment

Kerala's Value Proposition

- Capitalizing on Kerala's creative talent pool and its emerging animation, visual effects, gaming, and comics (AVGC) ecosystem, GCCs can focus on content creation, game development, animation studios, visual effects, and related digital media services, aligning with the state's AVGC policy initiatives.
- The state has a skilled workforce in cutting-edge technologies, setting the stage for the growth of the AVGC-XR sector. This coupled with comparatively lower operational costs, makes Kerala an attractive location for gaming and VFX studios.

8 Semiconductors, Advanced Engineering, and R&D

Kerala's Value Proposition

- Leveraging the strong engineering talent pool and academia-industry connect, GCCs involved in product development, design engineering, advanced materials research, and embedded systems will find a supportive ecosystem.
- TrEST, Kerala's first technology research science park, enables collaborative research in microprocessor design, EVs, and emerging technologies.
- Supported by the Government of Kerala, KSUM partnered with MIT's Fab Lab Foundation to set up Fab Labs at Technopark, Trivandrum and KTIZ, Kochi, including Kochi's Super Fab Lab—the first outside the US—hosting the Fab Academy program.

10 Automotive & EV

Kerala's Value Proposition

- Kerala EV Policy incentivizes the R&D and manufacturing of EV components, crucial for attracting GCCs focused on next-generation automotive technology.
- State support through the Kerala State Industrial Development Corporation (KSIDC) provides investment facilitation and industrial land.
- Strong engineering curricula across major state universities (CUSAT, Kerala University) focus on Embedded Systems and IoT, essential for vehicle software.

Kerala's GCC Boilerplate – The Smartest Way to Set Up Your Global Capability Centre

A frictionless, turnkey framework to establish and scale Global Capability Centres in Kerala. From your first touchdown to full-scale operations, we've built a seamless path for global enterprises ready to expand in India.



From the moment you step off the plane to the day you achieve full-scale operations, our **Dedicated GCC Setup Team** ensures every transition is smooth, every challenge is addressed, and every milestone is reached on schedule.



White Glove Service

Personalized support from day one



Accelerated Timeline

Weeks, not months to operations



End-to-End Support

Every step handled seamlessly



Navigate complex expansion with a unified support structure. Our specialized team coordinates across all functions, eliminating silos and ensuring consistent, high-quality service throughout your setup journey.



Pre-Arrival & Logistics

Airport welcome, accommodation arrangements, local transport coordination



Legal & Incorporation

Entity setup, SEZ registration, regulatory clearances, compliance frameworks



Office Setup

Plug-in office access, site selection support, custom design & fit-out services



HR & Talent

Strategic hiring plans, leadership recruitment, HR policy development



Finance & Taxation

Banking partnerships, tax optimization strategies, investment advisory services



Operations & Strategy

Vendor management, business continuity planning, scalability roadmaps



Start work the day you

land. Why wait months for infrastructure when you can begin operations immediately? Our plug-and-play office model eliminates setup delays and capital expenditure hurdles.

Ready-to-Use Spaces

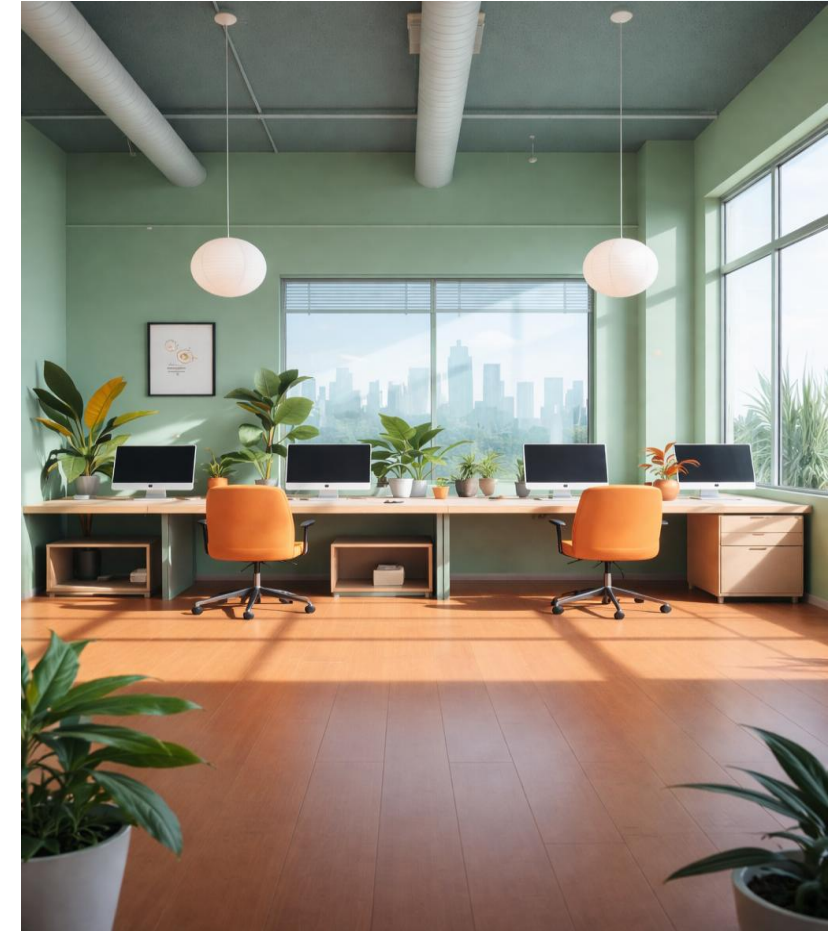
Fully equipped plug-in offices strategically located in major business hubs across Kochi and Thiruvananthapuram

Cost Savings

Government IT parks offer substantial cost savings during your critical early-stage operations

Scale as You Grow

Seamless transition pathways to custom-built facilities when your operations expand beyond initial capacity





Kerala offers one of India's most competitive incentive packages designed specifically for Global Capability Centres. The comprehensive support structure maximizes your ROI from day one.

SGST Reimbursement

Up to **₹10 Crore** in state GST reimbursements to reduce your operational costs

Registration

Exemptions

Complete **stamp duty** and **registration fee** waivers for property transactions

Capital Subsidies

Substantial support for **capital investments** and attractive **land lease subsidies**

Diversity Incentives

Rent discounts for organizations demonstrating commitment to diverse workforce composition

Rental Assistance

6-month rent-free occupation at Technopark, Infopark, and Cyberpark.

Talent Development

Generous **skill development subsidies** to upskill your workforce and build specialized capabilities

Kerala's GCC Vision 2030



Position Kerala as India’s premier “**Specialized GCC Destination**” — a state that integrates digital governance excellence, deep talent pools, innovation-linked policies & incentives, and sustainable living to host next-generation GCCs.

Strategic Positioning Pillars	Strategic Focus	2030 Aspiration
Talent Leadership	• Build a future-ready, specialized digital workforce through unified industry–academia–government skilling frameworks.	• Kerala recognized as one of the top state for GCC-ready digital & STEM talent.
Policy Differentiation	• Institutionalize Kerala GCC Policy with “Ease, Incentives, and Impact”	• State policy benchmarked nationally for clarity, flexibility, and execution speed.
Infrastructure Readiness	• Accelerate completion of ongoing tech park development, infrastructure & smart city projects, and strengthen public transportation system (enhance inter / intra city connectivity)	• Establish 5 GCC-ready campuses and 3 sectoral CoEs (such as AI, Cybersecurity, etc.) by 2030. • Fast-track completion of ongoing infrastructure projects and expansions
Ecosystem Branding & Promotion	• Brand Kerala as the “Green, Secure, Digital State” — ideal for establishing GCCs of firms operating AI, Cybersecurity, Health tech, BFSI, SaaS, etc. • Actively promote Kerala as a GCC destination through targeted campaigns, roundtables and participation in industry events.	• Host annual GCC Kerala Summit with global partners and CXOs • Build a dedicated GCC platform – GCC expansion cell • Run a GCC Branding Campaign in key HQ markets — highlighting Kerala’s talent, cost, and livability
Sustainable & Inclusive Growth	• Leverage Kerala’s quality of life, sustainability, and gender diversity as talent retention levers.	• Highest female participation rate in GCC workforce among Indian states.



INVESTMENT

- Establish dedicated GCC parks within major IT and development corridors, alongside other IT infrastructure projects.
- Become the go-to destination for FDI, & enable local investments for expansion and growth



HUMAN CAPITAL

- Skill 5–8 lakh youth in higher-value digital & life-sciences jobs (deep-tech, AI, biotech, advanced manufacturing)
- Increase women participation through targeted upskilling, flexible employment models, women-centric entrepreneurship support, childcare & transport subsidies



INNOVATION

- Pioneer industry-academia partnerships to become the R&D citadel
- Position Kerala as a preferred startup & impact-innovation destination by scaling demo/fab labs, maker spaces, and international accelerator ties



MARKET EFFICIENCY

- Foster an industry friendly climate by enabling seamless access to land, labor, and capital
- Maintain the leading position in 'Ease of Doing Business' by streamlining all G2B (Government to Business) processes and simplifying regulations



GOVERNANCE

- Ensure robust policy-making, along with transparent and efficient governance committed to drive economic development
- Strengthen institutional and regulatory frameworks, and establish specialized agencies to drive vision delivery



INFRASTRUCTURE

- Develop well-planned, best-in-class, sustainable and resilient infrastructure to lay the foundation for growth
- Develop robust social and commercial spaces, seamless transport networks, and sustainable water and sanitation systems for a thriving economy and empowered society



Current Scenario:

- Kerala is home to ~40 GCCs, employing 40K professionals.



Vision

2030:

- Growing from 40 to 120 centers
- Expanding from 40,000 to 200,000 profession

Current Scenario

India has 1800+ companies who have GCCs in India. This number is expected to reach 2400+ by 2030.

What are highest-priority opportunities to tap into?

1. Emerging Enterprises / Mid-Market Firms

It is estimated that by 2030, 350+ new emerging firms (with under \$2Bn global revenue) will establish centers in India.

2. Large Firms (Fortune 500 or Forbes Global 2000)

In 2025, ~75-100 GCCs in India expanded their operations by establishing new centers in additional cities. This expansion trend is expected to accelerate in the coming years.

3. Key Industries to Focus

Technology & Software, BFSI, Transport & Logistics, and Healthcare are the fastest growing industries for GCC establishment.



Become Go-To-Choice for Companies Looking for Tier 2 Cities Expansion

Target Mid-Market / Emerging firms

Target mid-sized / emerging enterprises (up to 2Bn revenue) with bespoke incentives, as they will drive India's upcoming GCC growth, typically establishing 50–500 seat centers.

Best proposition for the employer & employee

Create a next-generation policy framework that simultaneously attracts global companies and top-tier talent by addressing their emerging needs, enabling Kerala to become the investment choice for high-growth, innovation-led industries.

Specialized hubs for expansion of existing GCCs of large firms

Position the state as an expansion hubs for Fortune 500 / Forbes 2000 companies, where these companies can establish specialized hubs for certain functions such as AI, Cybersecurity, Finance, Supply Chain, etc.

Develop, expand, and prioritize IT/ GCC corridors across cities

Meet the growing demand for high-quality offices, as well as residential, retail, and entertainment spaces. These corridors should offer world-class infrastructure, streamlined policy support, talent mobility, and sector-specific innovation clusters, positioning Kerala as a competitive hub for next-generation GCCs and digital enterprises.

Key Recommendations and Way Forward



Focus on Mid-Market Companies

Prioritize attracting mid-sized companies (up to 2B\$ revenue profile) by offering tailored incentives and support.

Mid-sized firms will drive the next phase of GCC growth & expansion in India. They are GCCs that will house anywhere b/w 50-500.

Mid-market GCCs focus on high end innovative work as well as nimble and constantly looking at doing more with their leaner IT budgets.



Ease of Doing Business

Offer free incorporation and compliance management services for the first year to reduce barriers to entry for new GCCs.

Faster Approvals & Reduced Red Tape

Strengthen the single-window clearance system with a guaranteed **30-day approval** process.



Hub-and-Spoke model for Enterprise / Large Companies

Establish Kerala to be seen as the spoke in the hub and spoke model, where the primary office can be in one of the matured GCC hubs (where they already have presence) and spoke office in Kerala.

Kerala can be positioned as expansion hubs for Fortune 500 / Forbes 2000 companies, where these companies can establish specialized hubs for certain functions such as AI, Cybersecurity, Finance, Supply Chain, etc.



Data Protection & Digital Governance Hub

Position Kerala as India's leading digital governance hub by ensuring GDPR-compliant data frameworks, making it the preferred choice for data-sensitive industries like BFSI and Healthcare.



Customized Packages for Large Brands / Projects

Create customized incentive packages for mega-projects (over 1000 employees), marquee brands (top 500 brands worldwide), and strategic projects (set up specific CoEs) that align with the state's mission.

Establish a custom committee, potentially led by the IT Minister, to expedite approvals for these specialized GCC projects.

Treat this category differently from the other GCC setups as they'll act as "anchor tenants" which will attract other GCCs and talent to the state.

Incubation space for GCCs during initial period

GCCs often leverage flexible office spaces, such as co-working centers and business incubators, during their initial setup phase in markets like India. This helps them save initial cost of operations while they're still attracting talent and scaling. Models such as BOT are gaining popularity, recently.



The following is a compilation of initiatives and action items actively promoted and integrated into the GCC policies of leading competitor states.

EPF contribution support

To enhance job creation and reduce the initial employment cost burden, the Government may consider reimbursing or sharing the EPF contribution for a defined period (e.g., 3–5 years) for new employees hired under eligible GCC projects.

Internship in GCCs (Stipend Support)

To strengthen the industry–academia connect and create a sustainable talent pipeline, the Government may provide stipend support for student internships within GCCs, particularly for candidates from Kerala’s universities and technical institutions.

Return-ship Program for Experienced Professionals

Return-ship Programs to encourage career Re-Entry

Incentives for hiring career returnees (women on career breaks, mid-career professionals).

Patent-Filing Incentive

To promote innovation-driven operations and R&D initiatives within GCCs, the Government may offer reimbursement of patent filing and related statutory fees for intellectual property generated from Kerala-based centers.

Industry-Specific R&D and Innovation Hubs

The Government may establish or co-develop industry-specific R&D hubs (e.g., AI, fintech, health tech, logistics, etc.) in collaboration with GCCs and academia.

These hubs can serve as shared infrastructure for advanced research, product testing, and knowledge exchange, strengthening Kerala’s position as an innovation-led GCC destination.

Other Key Observations: Kerala’s Draft GCC Policy identifies talent development and employment generation as priority incentive areas; however, the framework does not quantify these benefits. The absence of defined, measurable talent-linked incentives may limit clarity for investors.



Skill Development

Challenge: Emerging cities lack certain skills compared with larger cities.

Strategic Mitigation Approach:

Need to unify skilling programs under one GCC Talent Mission: Position ICTAK, ASAP, GTech MuLearn, KKEM, etc. into a single “Kerala Global Talent Grid” aligned with GCC skill needs (digital, analytics, automation).

Action Items:

- Launch advanced technology training and industry-aligned education programs to enhance employability of the local workforce.
- Partner with universities and existing GCCs to co-develop GCC-aligned curriculum and certification programs.
- Introduce attractive incentive mechanisms encouraging existing GCCs and corporates to invest in workforce upskilling and establish collaborative training ecosystems with academia.
Example: Incentivize companies who use GTech’s MuLearn platform to skill their employees.
- Prioritize soft-skills development to prepare upcoming graduates for a rapidly changing industry landscape that increasingly demands a consultative approach.
- Host regular Kerala Tech Summits, GCC leadership forums, and hackathons to make professionals feel part of a larger innovation story.
- Expand seats in AI, cybersecurity, semiconductors, and fintech across engineering, diploma, and ITI institutions.

Talent Retention

Challenge: Local talent migrate for better opportunities in larger cities or abroad.

Strategic Mitigation Approach:

Prioritize high-skill job generation via targeted incentives; strengthen academia–industry integration via mandatory internships.

Action Items:

- Prioritize “anchor tenants” - large global brands whose presence attracts supporting firms, vendors, and startups.
- Provide targeted incentives for generating high-skill jobs in GCCs (in areas like AI, fintech, health tech, cloud, analytics, etc.) rather than low-skill BPOs.
- Mandate semester internships and “learn-to-hire” models with GCCs and tech firms.
- A targeted “Return-to-Kerala” program to facilitate skilled professionals working abroad or in other states to return and contribute to Kerala’s GCC ecosystem. The program may include relocation assistance, skill reorientation support, and awareness campaigns showcasing career opportunities in Kerala-based GCCs.
- Enhance the city’s cosmopolitan appeal to attract talent from Tier 1 and other urban centres, strengthening Kerala’s ability to draw and retain top professionals. **Example:** A vibrant nightlife and diverse entertainment options are a key part of what makes a city a global competitor and attract workforce.



Trivandru^m

Deep Tech & Engineering Hub

Positioning: *“India’s GCC hub for regulated, mission-critical, deep-engineering and tech work”*

Primary domain specializations:

- Aerospace & Space Systems Engineering, Automotive
- Defense & Dual-Use Technologies
- Semiconductor design support & EDA
- AI for regulated systems (safety-critical AI)



Kochi

Enterprise Digital, FinTech, Platforms & Global Operations Hub

Positioning: *“India’s global-facing enterprise and platform GCC hub”*

Primary domain specializations:

- FinTech & Payments Engineering
- Enterprise SaaS & Platform Engineering
- Cloud, DevOps & Cybersecurity
- Digital Commerce & Supply-Chain Tech
- Product management & UX engineering



Kozhikode

Kerala’s Emerging GCC hub

Positioning: Kozhikode as a COE-Focused GCC Hub: GCCs to increasingly set up as:

- AI CoEs
- Product engineering labs
- Advanced analytics & applied research units

These units typically start small (<50 teams) but create high strategic value — perfect for a non-metro city.



Strengthen Travel Efficiency

Developing faster road corridors within and between Trivandrum, Kochi, and Kozhikode, alongside accelerating rail modernization projects will significantly reduce travel times and better integrate Kerala's major talent clusters.

Complementing this with improved last-mile transport around tech parks, airports, and key business districts will create a seamless mobility ecosystem.



Enhance Regional Air Connectivity

Increase frequency of same-day flights among Kerala's major airports and other Tier 1 cities to support executive travel and inter-office movement.

Partner with airlines to introduce short-hop regional routes that cut down multi-hour road travel.



Expand International Connectivity

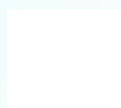
Continue investments in direct long-haul routes to Europe and North America, as these are key markets for GCC leadership, client meetings, and HQ travel.

Position Kerala airports as efficient transit hubs for APAC and Middle-East corridors.

Impact for GCCs & Investors:



Reduces travel friction and improves same-day decision-making speed.



Makes Kerala more attractive for leadership teams who frequently travel across India and globally.

Supports efficient operations, talent mobility, and inter-office collaboration.



Strengthens Kerala's brand as a well-connected, future-ready business ecosystem.

Addendum

Location Comparison Study



The study followed a structured three-step approach designed to ensure a comprehensive and data-driven assessment.

Step 1

City Selection

- Top Tier 2 cities across India were identified to benchmark against Trivandrum and Kochi to enable a comprehensive comparative assessment of emerging GCC locations.
- City selection was guided by a balanced geographic representation and policy-driven attractiveness, focusing on states actively promoting GCC growth through targeted incentives and infrastructure initiatives.

Step 2

Comparison parameters and sub-parameters

- Identified all the major parameters and sub-parameters across 5 key pillars, i.e., Talent Availability, Financial Attractiveness, Business Environment, Infrastructure, and Social & Living Environment
- Assigned weightages to all the parameters based on importance.
- Existing GCC leaders and key industry participants inputs were taken while selecting parameters and assigning weightages.
- A model / dashboard was prepared to evaluate and compare cities

Step 3

Data Collection and Reporting

- Data collection was done based on secondary and primary research.
- Connecting with existing GCCs and ecosystem partners to gain on-ground insights and perspectives.
- Key published market assessment study and assets were utilized for data gathering.
- ANSR's in-house tools i.e., Talent500 platform, along with LinkedIn Talent Insights and Naukri databases were referred for talent benchmarking.



1 Skills / Talent Availability

- GCC-Ready Skills / Manpower Availability
- Annual STEM Talent Influx
- Presence of Higher Education Institutions (Engg./Management/etc.)
- Talent Attrition / Migration Benchmarking

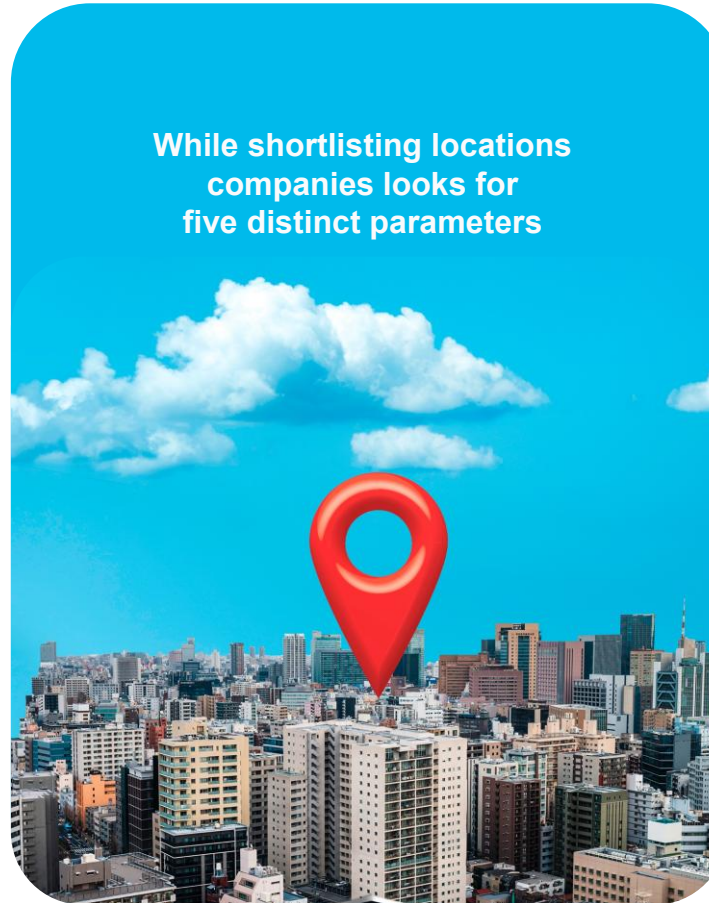
2 Financial Attractiveness

- Labor / Talent Cost
- Grade A Office Rental Rates (Range)
- Government Incentives for GCC Establishment (Employment Generation, Infrastructure Related Incentives, Ecosystem Development, Other Financial Incentives)

3 Business Environment & Competitiveness

- Government Policies & Support for GCC Establishment – Regulatory Easing
- Ease of Doing Business (BARP Rating)
- Startup Ecosystem Maturity
- Presence of GCCs and IT Service Providers
- Presence of Startup Incubation Centers / STPI / COEs, etc.

While shortlisting locations
companies look for
five distinct parameters



4 Infrastructure & Accessibility

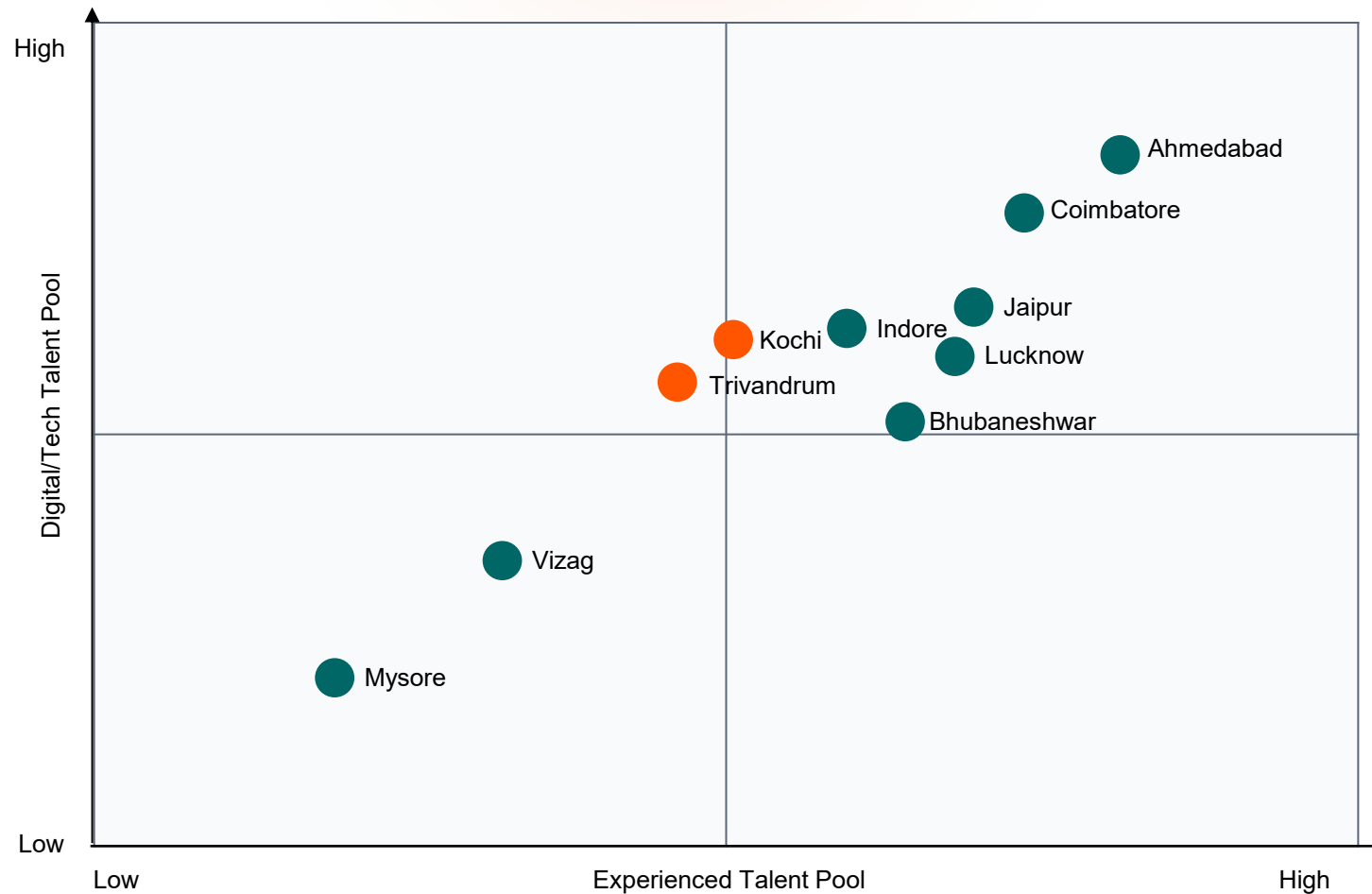
- Grade A Office space availability
- Presence of Tech Parks
- Upcoming / Ongoing Office Space Development / Tech Parks under development
- SEZ Presence
- Land Availability for Tech parks
- International Connectivity to Key Global Destinations

5 Social and Living Environment

- Cost of Living Index
- Crime, Pollution, and Traffic Index
- Healthcare Infrastructure
- Intra-City and Inter-City public transport connectivity



Total talent pool and digital talent pool mapping in key emerging hubs



Key Observations

Ahmedabad stands out for its rich pool of technology talent, in both core and digital skills, and Jaipur is a close second. Both cities have benefited by the virtue of being state capitals and the large talent pool from the education ecosystem developed here.

Trivandrum and Kochi have low number of experienced talent pool; however, **both the cities rate high in terms of digital maturity among the talent ecosystem**

The next phase of growth will be defined by the city that excel in scaling and upskilling their talent.

Talent Attrition / Migration Trends

- In terms of talent attrition, majority of Tier 2 cities are at par against each other. Attrition is lower compared to Tier 1 cities
- However, talent migrating to Tier 1 cities are still high among most Tier 2 hubs (especially from Kerala cities).
- There is need to create high-skilled tech jobs to retain talent from migrating to Tier 1 cities for better opportunities.



	Labor / Talent Cost	Office Rental Affordability (Grade A Space) – Avg. Rate in INR / Sq. ft. / Month
Trivandrum		40-65
Kochi		40-60
Coimbatore		80-90
Ahmedabad		42-47
Mysore		30-50
Bhubaneshwar		60-80
Indore		40-50
Vizag		35-50
Lucknow		40-50
Jaipur		52-62

Key Observations

All the Tier 2 cities offers low labor cost / salaries when compared to Tier 1 cities. **Trivandrum and Kochi holds slight edge over other major peers.**

Kerala holds a distinct competitive edge in the GCC landscape, with Kochi and Trivandrum offering significantly lower Grade-A office rental costs compared to other established Tier-2 hubs.

[illegible]

Least Favorable Most Favorable

GCC-Policy Observations

- All the states are placing strong emphasis on attracting GCCs through a comprehensive package of infrastructure-linked incentives designed to lower setup costs and accelerate investment readiness.
- Embedding strong provisions for talent development & upskilling, creating the right ecosystem to attract global investors and nurture robust, industry-aligned talent pipelines is key.

Note: Detailed GCC policy analysis and recommendations is present in next section of the presentation



	Government Policies and Support – Regulatory Easing	Ease of Doing Business Ranking (BARP Rating of State)	Startup Ecosystem (Total No. of Registered Startups)	Presence of GCCs and Top IT Service Providers	Presence of Incubation Centers
Trivandrum					
Kochi					
Coimbatore					
Ahmedabad					
Mysore					
Bhubaneshwar					
Indore					
Vizag					
Lucknow					
Jaipur					

Least Favorable  Most Favorable

Key Observations

Kerala excels in policy and ease of doing business, offering a highly supportive startup-friendly environment, especially for early-stage tech and hardware innovation

Kerala is widely recognized for its robust and successful framework in providing incubation centers and fostering a strong startup ecosystem. It has consistently been ranked as a top performer among Indian states in supporting startups and has a vast network incubators

Kerala’s startup policy and KSUM-led governance have created a supportive regulatory and policy framework.

However, the ecosystem needs scale-up capital, larger GCC footprints, and more national-level visibility to mature into a top-tier innovation hub.



	Available Grade A Office Stock – Vacancy	Upcoming / Ongoing Commercial Projects	Presence of Technology Parks	Overall SEZ Presence	Land Availability for Tech Park Development	International Connectivity
Trivandrum						
Kochi						
Coimbatore						
Ahmedabad						
Mysore						
Bhubaneshwar						
Indore						
Vizag						
Lucknow						
Jaipur						

Least Favorable  Most Favorable

Key Observations

Most emerging Tier-2 cities demonstrate comparable availability of Grade-A commercial spaces. However, **Kochi holds a marginal advantage owing to a higher proportion of ready-to-occupy inventory and scalable IT park capacity.** Ahmedabad stands out as an exception with the presence of GIFT City, offering globally benchmarked infrastructure and integrated urban planning.

Both Trivandrum and Kochi rank high in terms of under-development and upcoming Grade-A stock, supported by active infrastructure expansion within Technopark, Infopark, and Technocity precincts.

Compared to other hubs, Kerala leads in terms of operational projects and near-term completions.

While Trivandrum and Kochi provide robust air connectivity to the Middle East, which remains a key GCC-linked market, direct connectivity to major Western hubs (North America and Europe) remains limited.



	Cost of Living	Law and Order Situation	Pollution Levels	Traffic Situation / Ease of Commute	Healthcare Infrastructure	Intra-City Public Transport	Inter-City Public Transport
Trivandrum							
Kochi							
Coimbatore							
Ahmedabad							
Mysore							
Bhubaneshwar							
Indore							
Vizag							
Lucknow							
Jaipur							

Least Favorable  Most Favorable

Key Observations

Both Trivandrum and Kochi perform above average across most socio-economic and infrastructure indicators, with strengths in quality of life, healthcare, safety, low pollution levels, and moderate living costs.

Although rated low currently, projects like the Vizhinjam Port, metro projects, outer ring road, expanded airport terminal, etc. will soon elevate Trivandrum’s intercity and international connectivity

Kochi combines world-class healthcare, superior urban transport, and an existing IT ecosystem, making it Kerala’s most GCC-ready city for large-scale delivery and shared services centers.



Strengths

Talent

- Highest literacy rate in India (~97%)
- Ranks high in terms of employable talent
- Has most globally mobile and English-proficient workforce
- Mature IT ecosystem in Trivandrum and Kochi
- Low labor cost compared to Tier 1 and even other peer Tier 2 cities

Infrastructure

- Low office rentals in Grade A spaces
- Plug-and-play readiness
- Good pipeline of upcoming and under-development projects

Business Ecosystem

- #1 Rank state for Ease of Doing Business
- Presence of proactive government bodies like KSITIL, Kerala Startup Mission (KSUM), ASAP Kerala, and ICT Academy driving upskilling programs in AI, Data Analytics, Cloud, and Cybersecurity — directly aligned to GCC skill needs
- Presence of Start-ups, Incubators, and R&D ecosystem
- Proactive government policies (GCC and IT policies)

Social & Living Environment

- Affordable cost of living
- Less pollution
- Good healthcare & education infrastructure
- Attractive tourism and cultural destination of India
- Ease of Commute / Less Traffic within major cities

Limitations

Talent

- Challenge of talent scalability – as demand grows GCCs might find challenging to attract from existing pool
- Limited Mid-to-Senior Management talent pool – as most experienced workforce tend to migrate to Tier 1 cities or abroad
- Perception Gap – currently viewed as “Good for Delivery, Not for Leadership”
- Mid-career professionals and expats may hesitate to relocate permanently unless the urban experience improves in and around IT hubs

Infrastructure

- Infrastructure attractiveness depend upon timely completion of projects such as Metro, Ring-Road, Highways, etc. Also, the under developing commercial space projects

Business Ecosystem

- Other peer hubs such as Ahmedabad, Coimbatore, and Jaipur are viewed as more matured comparatively in terms of start-up, product companies, and service provider ecosystem

Social & Living Environment

- Unlike states with strong intercity corridors connecting with Tier 1 cities(e.g., Chennai–Coimbatore, Bengaluru-Mysuru, etc.), Kerala's dispersed geography dilutes clustering benefits for GCC ecosystems

Detailed GCC Policy Comparison



	Talent / Skill Development Incentives	Infrastructure Incentives	Other Financial and Non-Fiscal Incentives
Kerala (Draft Policy)	• Employment Generation Incentive: A subsidy provided per employee, for a specified period, based on the number of new jobs created by the GCC. • Employment Generation Support: Recruitment support, GCC Leadership Hiring, and best-practice HR-policy drafting for GCCs. • DEI Focus: Salary reimbursement for specially-abled, Transgender, etc. • Talent and Skill Development: Financial support for upskilling and reskilling programs for the local workforce to meet GCC talent requirements. • Academia-Industry Collaboration: Strengthening partnerships between universities, technical institutions, and GCCs. • Initiatives to attract and retain global talent • Open-source community support through ICFOSS • K-AIM Mission acts as talent & ecosystem development in AI.	• Rental Assistance: 6-month rent-free occupation at Technopark, Infopark, and Cyberpark. • Capital subsidies (for creating office infra) for new or expanded GCCs investing at least ₹50 crore and creating 1,000 jobs, with varying rates by location and a yearly cap of ₹50 crore disbursed in 12–15 instalments. • Land Leasing: 5–15% subsidies on 90-year government land lease premiums for projects creating 1,500 to over 4,000 jobs. Tax-Benefits: • SGST reimbursement up to INR 10 Crore for 5 years. • 100% waiver of Stamp Duty and Registration charges. • Up to 50% waiver of land conversion charges. • Power Traffic subsidy • Building/property tax on government-owned building waived. • 50% reimbursement of land tax for a period of 5 years for Private IT Parks and Co-developers. • Tax exemption for IT companies in IT parks (in priority areas) Digital Infrastructure Incentives to support investment in cutting-edge technologies like 5G connectivity, cloud computing, and blockchain to boost operational efficiency and security. DEI: Rental subsidy if GCC employs specially-abled, Transgender, etc. In GCCs have 50% women employee, they get more rental subsidy in govt. IT parks.	Quality Certification Incentive: Refund up to 50% of the expense incurred for obtaining quality certifications (e.g., ISO, BIS, CMM level 3 to 5), subject to a maximum of Rs 25 lacs per unit per annum. Special Green Campus Subsidy Investment Beyond Major Cities: Special incentives, grants, and subsidies will be provided for infrastructure projects and investments by GCCs and infrastructure companies in locations beyond Kochi and Thiruvananthapuram Other Incentives from Industrial Policy 2023: • Low interest loans • Capital subsidy incentives • R&D incentives Regulatory easing: • Single Window Clearance System • Dedicated GCC Promotion Cell – GCC Boilerplate GCC-Startup collaboration and Research Ecosystem: • Establishment of dedicated incubation and acceleration centres within universities, colleges and IT parks • Corporate innovation program for solving business problem – grants of INR 5 Lakhs per solution (10 grants per year). • Providing grants for GCCs undertaking R&D activities in cutting-cutting-edge technologies. Branding and Promotion: Annual GCC Conclave, Collaboration with IPCs, Roadshows, digital campaigns, etc. being planned to promote Kerala.
Tamil Nadu	• Job Creation Incentive: Payroll subsidies of 30%, 20%, and 10% over three years for jobs above ₹1 lakh/month, with an additional 10% for women, differently-abled, and transgender employees, targeting high-value roles in IT, finance, engineering, and manufacturing. • Skill Development & Upskilling: GCCs can avail an R&D training incentive of ₹10,000 per person per month for 12 months for qualified Tamil Nadu residents, along with a 50% subsidy on national or international certifications, capped at ₹1 crore.	R&D and Innovation Focus: • Reimbursement of 50% of expenses incurred for in-house R&D • Reimbursement of expenses up to Rs. 5 crore for standalone R&D assets • Subsidy 25% (up to 1 Cr.) of EFA on establishing product testing and prototyping facility • Subsidy 50% of EFA (Up to 1 Cr) on creation of NABL/ISO certified innovation labs Tax exemptions and benefits under SEZ policy for IT sectors.	Other Financial Incentives: • Purchase of a specialized software license - 50% of the expenditure incurred (up to 25 Lakh) • Reimbursement of expenses up to Rs. 1 crore for patents, copyrights, trademarks, and GIs, • Electricity Tax exemption for 5 year Regulatory Easing: • Single Window System – 40+ department, 200+ services with 1-30 days timeline • Guidance Tamil Nadu – SPOC for regulatory easing



	Talent / Skill Development Incentives	Infrastructure Incentives	Other Financial and Non-Fiscal Incentives
Karnataka (Beyond Bengaluru Focused)	Employment Generation: Financial assistance based on the number of newly recruited employees, with assistance up to INR 7 Crores. Custom recruitment assistance for Beyond Bengaluru EPF reimbursement for 2 years (up to 250 employees of 30% workforce). Skilling / Upskilling: General skilling incentives (e.g., up to ₹36,000 per graduate) are applicable across the state but are foundational to building the talent base in Beyond Bengaluru clusters. Internship Support: Reimbursement of 50% of internship stipend (up to ₹5,000/month per intern for 3 months), applicable for up to 100 interns or 15% of the workforce, whichever is lower.	Rental Reimbursement: GCCs with 100+ employees receive 50% rent reimbursement up to ₹50 lakh, while those with 500+ employees are eligible for 50% rent reimbursement up to ₹2 crore. Electricity Duty: 100% exemption from Electricity Duty for 5 years Internet: Reimburse 25% of the internet expenses for the first three years of GCC operations Power Tariff Switch: GCCs will have the option to switch from the Commercial to Industrial power tariffs (cost savings). Property Tax Reimbursement: Reimbursement of 30% of the property tax incurred by GCCs. R&D Grants of up to 40% of the budget	Matchmaking: The Matchmaking platform for GCC and Academia and the Innovation Fund (₹100 crore) support joint research. Leadership Development: The government will partner with top educational institutions to promote leadership skill development through advanced Master's and certification programs, offering financial incentives and matching grants to encourage GCCs to invest in developing high-potential employees. Patent Filing: Reimbursement of 50% of the statutory fees (up to 2 Lakh for domestic patents) Regulatory Easing: Nano GCCs Support: Active support for the establishment of Nano GCCs (5 to 50 employees) in Beyond Bengaluru areas. - SPOC for GCCs, GCC Council Creation, Fast-Track Approvals, Single-Window Clearance System, Operational Helpdesk, Fortnight Meetings for Assistance, Real-Estate Portal for GCCs.
Gujarat	Job Creation Incentive: One-time grant of 50% of one month's CTC per new local hire (retained for at least one year), capped at INR 50,000 for male employees and INR 60,000 for female employees. EPF Reimbursement: EPF reimbursement for five years, 100% for female employees and 75% for male employees, capped at 12% of basic salary plus applicable DA and retaining allowance. Upskilling & Certification Support: The government offers DBT incentives up to INR 50,000 for globally recognized courses, 50% of course fees for professionals and 75% for students. Additionally, GCCs receive 80% reimbursement of quality certification costs, capped at INR 10 lakh for up to five certifications during the policy period.	Category 1 – GFCI < INR 250 Cr CAPEX Support: Up to 20% for building/fixed assets and 30% for IT infrastructure, capped at INR 50 Cr, disbursed over 20 quarterly installments. OPEX Support: Up to 15% of annual OPEX, capped at INR 20 Cr per year for 5 years; bandwidth & cloud spend limited to 35% of OPEX or INR 7 Cr, whichever is lower. Category 2 – Mega Projects (GFCI > INR 250 Cr) CAPEX Support: Up to 20% for building/fixed assets and 30% for IT infrastructure, capped at INR 200 Cr, disbursed over 20 quarterly installments. OPEX Support: Up to 15% of annual OPEX, capped at INR 40 Cr per year for 5 years; bandwidth & cloud spend limited to 35% of OPEX or INR 14 Cr, whichever is lower. Electricity Duty Reimbursement: 100% electricity duty exemption for five years from commencement of operations approval date.	GCC–Start-up Collaboration: GCCs offering incubation facilities to start-ups are eligible for 25% CAPEX support (up to INR 25 Cr) and OPEX support covering 15% lease rent and power costs, plus 20% reimbursement on bandwidth and cloud expenses. Startup Acceleration Support: GCCs facilitating startup investments through VCs or investors are eligible for 10% assistance on the investment amount, capped at INR 10 lakh. Interest Subsidy: Eligible units receive a 7% interest subsidy on term loans (or actual interest paid, whichever is lower), capped at INR 1 Cr per year for up to 5 years from the start of interest repayment. Single Window Clearance System for GCC Establishment



	Talent / Skill Development Incentives	Infrastructure Incentives	Other Financial and Non-Fiscal Incentives
Odisha	Employment Generation: Recruitment assistance of 10%–50% of hiring costs, capped between ₹50 lakh and ₹10 crore, based on the number of new employees recruited. EPF Subsidy: 100% reimbursement of employer's ESI and EPF contributions, capped at ₹5 crore per year for 5 years. Upskilling / Skilling: 50% reimbursement of training fees for recognized certifications, capped at ₹50,000 per employee and ₹20 lakh per unit over 5 years, with a clawback if the employee exits within 2 years. Internship Generation: 50% stipend reimbursement up to ₹10,000/month per intern for 3 months, applicable to Odisha-domiciled or enrolled students, capped at 15% of the workforce or 100 interns.	Rent Expense: ₹20/sq. ft. for carpet area and 10% extra for common facilities for first 5 years. GCCs in co-working spaces can get up to ₹6,000 per seat/month, First 5 GCCs relocating to Odisha get 50% relocation cost reimbursement. Reimbursement of up to 30% of the Fixed Capital Investments (FCI) in buildings for up to 2 years after the commencement of operations. Building R&D infrastructure for emerging tech such as AI: - Reimbursement up to 50% of the approved budget or INR 50 crore, whichever is lower. Other Incentives: 100% exemption from Electricity Duty and Electrical Inspection Fee for first 5 years - Reimbursement of Power Tariff of Rs. 2.00 per unit - Reimbursement provided at the rate of 75% of cost of Energy Audit - Reimbursement of up to 50% of the internet expenses for the first 3 years 100% Stamp Duty Exemption and Allocation of Land.	GCCs providing acceleration support to startups - Government will support maximum of 5 GCCs per year for providing the facilities to minimum 4 Startup each, with a maximum limit of INR 40 lakh per GCC for 5 years. Patent Filing Incentive: Reimbursement of up to ₹5 lakh per domestic patent (₹20 lakh per unit) and ₹10 lakh per international patent (₹50 lakh per unit) during the policy period. GCCs supporting start-ups: The government will fully reimburse startups for using GCC labs or spaces for over a month. Regulatory Easing: - Special Single Window Clearance Authority: Chaired by Secretary, E&IT for projects with investments up to ₹50 crore. - State Level Single Window Clearance Authority: Chaired by Chief Secretary for projects with investments between ₹50 crore and ₹1,000 crore. - High Level Clearance Authority: Chaired by the Chief Minister, for projects exceeding ₹1,000 crore. - GCC units are exempt from routine Labor Department inspections and can e-file all legal returns and forms.
Madhya Pradesh	Employment Generation: Payroll subsidy for 3 years—50% in Year 1, 30% in Year 2, and 20% in Year 3—for employees earning over ₹1 lakh/month, applicable to 50 employees (Level 1 GCC) and 100 employees (Advanced GCC). Upskilling/Reskilling: Reimbursement of up to ₹50,000 per employee or 50% of course cost, for a maximum of 25 employees (Level 1) or 50 employees (Advanced GCC) over 3 years. Internship Generation: One-time payment up to ₹10,000 per intern for Madhya Pradesh-domiciled interns	Rental Assistance: Support of up to ₹3 crore for standard office rentals and up to ₹10 crore for co-working space rentals. CAPEX: 40% subsidy on Eligible Fixed Capital Investment (ECI), capped at INR 15 crore (Level I GCC) and INR 30 crore (Advanced GCC). R&D Support: 50% reimbursement of R&D costs, capped at INR 1 crore per annum per unit. Support for Centres of Excellence (CoEs): Financial support of 50% of the project cost for establishing CoEs in areas like AI and Cybersecurity, capped at INR 10 crore. Land Rebate & Reimbursement: Concessions like a rebate on land up to 75% and 100% reimbursement of Stamp Duty and Registration Charges. Power Tariff subsidy	Patent Filing: Claim up to INR 500,000 for a domestic patent and INR 10lakh for an international patent (lower of actual cost). Events Assistance: Subsidy of one-third of the cost, capped at INR 25 lakh, for hosting industry events/conferences. Marketing Assistance: 50% subsidy on expenses for attending national and international events, up to INR 200,000. Quality Certification Assistance: 50% subsidy for quality certifications, up to a maximum of INR 600,000 (This is claimed under the linked IT/ITeS policy). Interest Assistance: 6% interest assistance on term loans up to INR 5 crore



	Talent / Skill Development Incentives	Infrastructure Incentives	Other Financial and Non-Fiscal Incentives
Andhra Pradesh	Employment Generation: 6 Months CTC post 1.5 years employment (1.5 Lakh for domicile graduates & 3 Lakh for Experiences Hires) EPF Subsidy: 100% of employment share of EPF for 6 months (Women/BC/ SC/ST/Transgender). Talent Attraction Incentive: Employees relocating to Andhra Pradesh receive ₹1 lakh per year for 3 years as HRA or Children's Education Allowance, after completing 1.5 years of service in the state. Up-skilling Program: A Future Skills credit scheme supporting industry-specific and emerging skill needs of GCCs, covering technical, functional, managerial, and soft skills to enhance workforce readiness.	Rental Subsidy: - Rental subsidy of 2000/seat for 24 months - Early bird incentive - govt building rent exemption for 5 years - Tailor made incentives for GCC with seats>2000 Power Incentive: Industrial tariff will be applicable and discount of INR 1/unit for 5 years A 50% capital subsidy (up to ₹2,000/sq. ft.) and ₹1,500/seat rental support for incubators	Marketing Support. With up to ₹25 lakh for marketing activities, Single Window System – 261+ approvals with 1-60 days timeline
Rajasthan (Draft Policy)	Employment Generation: Payroll subsidies covering 50% of basic salary (up to \$2 lakh/employee/year for three years) and an additional \$20,000 for hiring at least 20 local freshers. EPF Subsidy: Reimbursement of 50% of the employer's contribution towards EPF and ESI for 7 years, applicable to employees of Rajasthan domicile on Training and Internship Support, reimbursing 50% of employee training costs (up to \$10,000/employee/month for three months) and 50% of stipends for interns from local institutions (up to \$10,000/intern/month).	Rental Assistance: 50% subsidy on lease rentals for a period of 5 years, up to INR 1 crore per annum (for GCCs with a minimum of 50 employees). Incentive for R&D (Innovation Labs/CoEs): Reimbursement of up to 50% of the EFCI, subject to a ceiling of INR 10 crore, for the establishment of Innovation Labs or CoEs. Customized Package: For marquee investors (EFCI > INR 500 crore and minimum 1,000 direct employees), total subsidies may be allowed up to 125% of the EFCI. Electricity : 100% exemption of Electricity Duty for 7 years. Power tariff on industrial rates. Stamp Duty and conversion charges: 75% exemption and 25% reimbursement of Stamp Duty and Conversion Charges. Internet: Reimbursement up to 1/3rd of the internet expenses, up to INR 10 lakh per year for the first three years (for GCCs with 50+ employees).	Patent Filing: 50% of the cost incurred for patents, copyrights, trademarks, and registration of geographical indications, subject to an overall ceiling of INR 5 crore. Green Incentive: 50% subsidy on the cost of establishing Environmental Projects, up to INR 5 crore. Quality Certification Incentive: Reimbursement of 50% of the cost incurred in obtaining quality certifications, up to INR 30 lakh. Marketing Assistance: 50% subsidy on expenses for participating in national (up to INR 2 lakh) and international (up to INR 5 lakh) GCC-focused exhibitions/events. Built-up Area Ratio (BAR): An additional BAR of 1 shall be available to GCC units without the payment of betterment levy. Interest Subsidy: 5% interest subsidy on loans for a period of 5 years (max of 2.5% EFCI per year) Regulatory Easing: Single-Window Clearance, Inspection Exemption, 24*7 operational permission, Women Employment in all Shifts, Exemption from weekly closure, Environmental clearance.



	Talent / Skill Development Incentives	Infrastructure Incentives	Other Financial and Non-Fiscal Incentives
Uttar Pradesh	• Employment Generation: Payroll subsidies up to ₹1.8 lakh per employee/year and ₹20,000 per UP-domicile fresher, promoting local hiring and inclusion across priority groups. • EPF Reimbursement: 100% EPF refund for Women, SC/ST, Transgender, and Specially-Abled employees from UP, up to ₹2,000 per employee/month for 3 years (max ₹1 Cr per year). • Skilling / Upskilling: Reimbursement of ₹50,000 per employee or 50% of training costs for up to 500 employees, capped at ₹50 lakh per year for 3 years. • Internship Assistance: 50% stipend reimbursement up to ₹5,000/month per intern, for up to 50 UP-domicile or UP-institution interns per year, available for 3 years. • Work From Home Benefits: UP-based remote employees are eligible for employment-linked incentives, including EPF reimbursement and payroll subsidies.	• Capital Subsidy: 25% of eligible capital investment, capped at ₹10 Cr (Level-1) or ₹25 Cr (Advanced GCC), with an option to claim SGST refund on capital goods instead. • Front-End Land Subsidy: Land allotment subsidy of 30% in GB Nagar & Ghaziabad, 40% in Paschimanchal/Madhyanchal, and 50% in Poorvanchal & Bundelkhand. • Reimbursement of Stamp Duty: 100% Reimbursement of Stamp Duty on purchase/lease of land/office space/buildings. Other OPEX incentives: • 20% reimbursement on lease, bandwidth, cloud, and power costs, capped at ₹40 Cr (Level-1) or ₹80 Cr (Advanced GCC) per year for 5 years. • Power Tariff on subsidized industrial rates.	• Customized Package: Offered case-by-case for advanced GCCs with FDI ≥ ₹50 Cr or for Fortune Global/India 500 companies. • Start-up Ideation/PoC Support: 50% reimbursement of PoC or ideation costs with start-ups, capped at ₹2 crore per year for 5 years. • CoE Grant-in-Aid: Support for establishing CoEs as per the UP IIEPP-2022 policy. • Patent Filing: 100% reimbursement of patent filing fees, up to ₹5 lakh for domestic and ₹10 lakh for international patents, claimable twice during the policy period. • Interest Subsidy: 5% Interest Subsidy per annum on the term loan, up to ₹1 crore per annum for 5 years • Linkage Support for Commercial Spaces: State will facilitate a live digital portal in collaboration with real estate partners to help GCCs find available commercial spaces • Regulatory & Operational Ease: GCCs receive inspection exemptions, 24x7 operational flexibility (including women in all shifts), pollution control relaxations, and support from a dedicated Technical Support Group for government coordination. • Administrative Support: A robust ecosystem led by Invest UP with platforms like Nivesh Mitra, Nivesh Sarathi, and a dedicated Policy Implementation Unit and Technical Support Group ensures single-window clearances, investor assistance, and

Policy Analysis Summary



Must Have

Employer PF Contribution Subsidy:

Subsidize the employer's share of Provident Fund contributions (ranging from 3 months to 2 years) reducing onboarding costs for GCCs

Talent Hiring Assistance:

Incentives ranging from ₹10,000 per hire to 50% of one month's CTC for local hires (domicile candidates and graduates from state-based institutions) to strengthen local talent pipeline

Subsidized Upskilling in Emerging

Technologies: Government-backed grants to train employees in advanced fields such as AI, IoT, Analytics, Blockchain, Cloud Computing, and Cybersecurity

Internship in GCCs:

Provide support to GCCs hiring interns by providing stipend reimbursement

Infrastructure Development for Talent Attraction:

Enhance social infrastructure such as housing, healthcare, transportation, and recreational amenities

GCC-Academia Collaboration:

Establish structured partnerships between GCCs and University of Kerala, APJ Abdul Kalam Technological University, IIM, XIME, etc., to drive funded research projects, PhD fellowships, and skill-based programs

Good To Have

Diversity-Driven Incentives:

Higher wage subsidies for hiring women and transgender employees to promote an inclusive workforce

Payroll Cost Offsets for High-Paying

Roles: Subsidies for salaries in emerging high-value sectors such as Oil & Gas, Healthcare, BFSI, Hi-Tech, etc.

Niche Skill Development Support:

Focused upskilling programs for specialized, sector-agnostic capabilities such as AI, IIoT applications in BFSI, Logistics, Automotive, etc.

Subsidized Workspace for Startups in GCCs:

Encourage corporate-startup collaboration by allowing startups to access subsidized spaces within GCC facilities

GCC-Specific Incubator:

Establish a 500-seater plug-and-play incubator that provides Mid-market with ready-to-use office space and resources, ensuring low-risk market entry

Common Amenities in GCC Parks:

Provide food courts, childcare (crèche facilities), banking services, convention centers, and hotels within GCC parks

Differentiators

University-Industry Collaboration for GCC Readiness:

Establish structured training programs in universities to equip students with GCC-specific skills, integrating specialized curriculum to ensure job-ready graduates

Return-ship Programs for Career Re-Entry:

Incentives for hiring career returnees (women on career breaks, mid-career professionals)

Relocation Support for High-Value

Talent: Employer-backed incentives to attract top talent from other states, including rental subsidies, child education support

Global GCC Leadership Conclave:

Position the State as India's GCC thought leadership hub by hosting an annual flagship event featuring C-suite executives, venture capitalists, policymakers, and academia

Incorporation and compliance:

Offer free incorporation and compliance support in the first year to reduce setup complexities

GCC-Start-up collaboration:

Create incubation space where GCCs and Start-Ups can collaborate.





Must Have

Good To Have

Differentiators



High-Speed Digital Infrastructure: Ensure 5G-enabled smart business districts with reliable cloud connectivity, data centers, and cybersecurity frameworks

Reliable Power & Utilities: Offer power cost incentives and assured electricity supply, particularly in Tier-2 cities

Offer rental reimbursement to GCCs for few month to some years

Sustainable Workspaces: Encourage GCCs to adopt green building standards, renewable energy integration, and energy-efficient campuses

Dedicated GCC Parks at Concessional

Rates: Develop GCC parks with land available at subsidized rates, with a minimum employment requirement of 1,000 employees to encourage large-scale investments

Multimodal Connectivity:

Strengthen airport-to-GCC hub connectivity with improved public transport, express highways, and dedicated last-mile connectivity

Smart City Integration:

Align GCC park development with smart city mission, ensuring digital-first infrastructure that supports IoT-enabled workplaces and AI-driven operational efficiencies

GCC-Only SEZs (Special Economic Zones):

Develop sector-specific SEZs dedicated exclusively to GCCs focused on R&D, Digital Services, and AI-Driven Innovation, offering customized tax and policy benefits

Onsite Business Hotels & Convention

Spaces: Develop integrated business hubs with onsite hotels, co-working lounges, and high-tech convention centers to cater to frequent global executive visits

Industry-Specific R&D Hubs:

Establish AI, fintech, healthcare, and automotive-focused R&D hubs within IT parks



Dedicated GCC Setup & Expansion Support: Introduce a GCC Ecosystem Orchestrator (GEO) as a sherpa who will guide and assist companies in navigating the GCC setup process and achieving their business objectives.

Digitized Compliance & Approvals: Implement automated, single-window approvals for GCCs, ensuring minimal delays

Simplified Employment & Work Visa Processing: Create a fast-track visa and work permit system for key foreign hires within GCCs, ensuring faster global mobility

Regulatory Sandboxes for Emerging Tech:

Allow GCCs to test and deploy emerging technologies (AI, blockchain, fintech) within controlled environments before full-scale regulatory approvals

Tax Incentives for GCC Innovation Units: Offer enhanced R&D tax deductions for GCCs investing in AI, IoT, and quantum computing

Offer reimbursement on new patent filing

International GCC Liaison Representatives:

Deploy state-backed representatives in key markets (US, UK, France, Japan, Germany) to act as liaisons between Kerala's GCC task force and multinational decision-makers, ensuring proactive deal sourcing and investment facilitation

Data Protection & Digital Governance Hub:

Position Kerala as India's leading digital governance hub by ensuring GDPR-compliant data frameworks, making it the preferred choice for data-sensitive industries like BFSI and Healthcare.

Long-Term GCC Viability analysis - (Kannur, Kozhikode, Thrissur, Kollam)



Comparative Analysis Summary

Criteria	Kozhikode	Thrissur	Kannur	Kollam
IT Park Footprint	✅✅ (Govt + Pvt)	✅ (Infopark spoke)	⚙️ Under Development	⚙️ Small active
Existing Work Force	★★★★	★★★	★★	★
Talent Pool (STEM Graduates)	📈 NIT Calicut, IIM Kozhikode	💎 Multiple colleges	⚙️ Developing	💎 Regional institutes
Connectivity	✈️ Excellent (Comparatively)	🚗 Good (Kochi link)	✈️ Improving	⚙️ Moderate
Ecosystem Maturity	👛 Relatively High	👛 Moderate	⚙️ Emerging	⚙️ Limited
GCC Suitability (0–5)	★★★★	★★★	★★	★



- High: Potential for Near-term**
- **Existing IT infrastructure:** Cyberpark (Govt) + UL Cyberpark.
 - **Proximity to NIT Calicut** ensures a strong, continuous engineering talent pipeline.
 - Excellent road, rail, and Calicut International Airport connectivity.
 - Presence of incubation centers at IIMK Live, NIT Calicut TBI, and Malabar Innovation Zone.
 - **Strong base of startups and SMEs**, providing feeder ecosystem for GCCs.
 - **Ideal for:** Immediate GCC / IT expansion; CoE focused, R&D, product engineering setups, etc.



- Medium: Near-term Growth**
- Infopark Thrissur operates as a spoke of Infopark Kochi; plug-and-play availability.
 - Near Kochi airport, well-connected to Kochi ecosystem.
 - Access to multiple engineering and management colleges; strong fresher talent base.
 - Lower operating costs make it suitable for delivery or support centers.
 - **Ideal for:** Secondary delivery centres; cost-optimized operations.



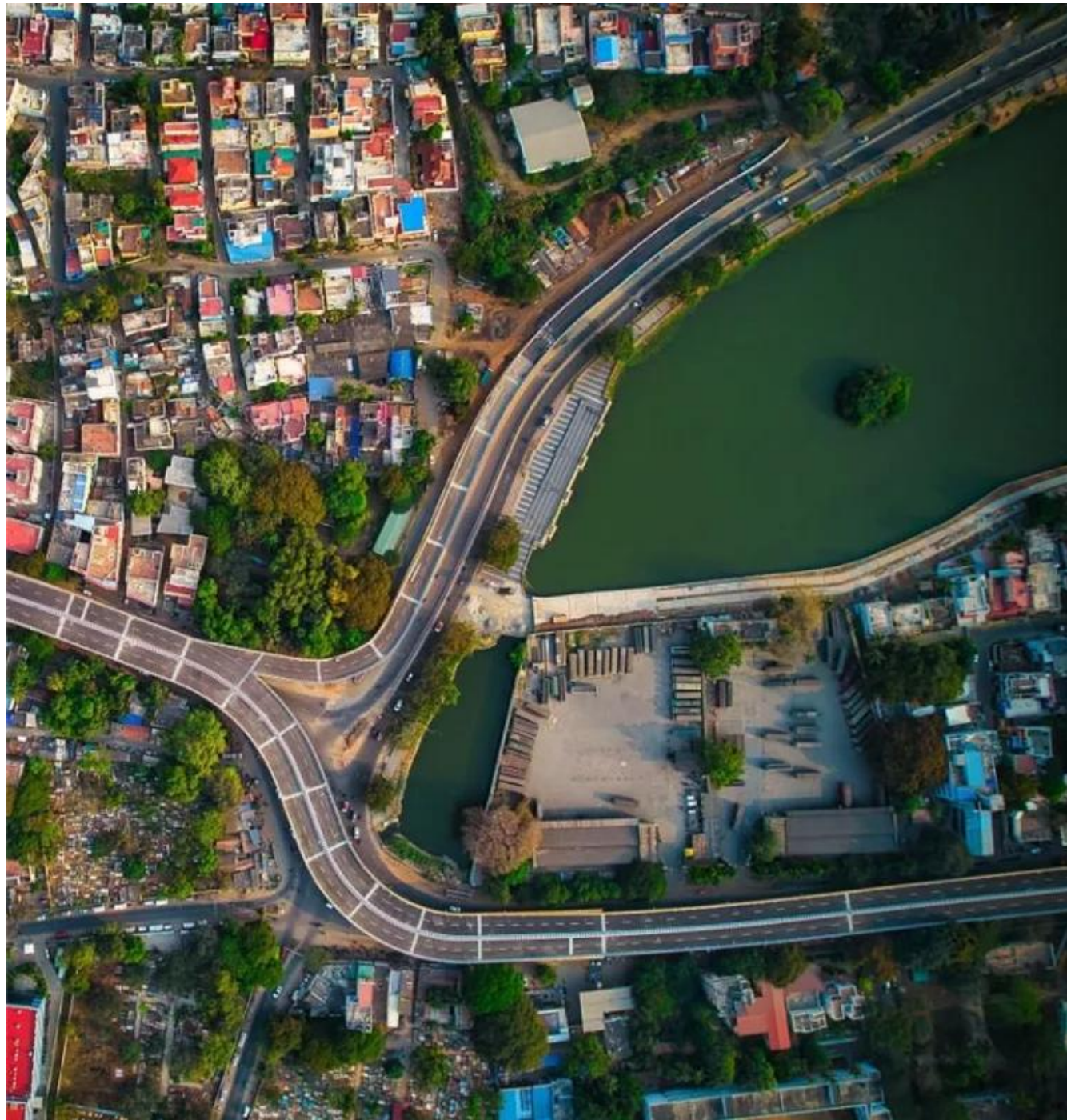
- Medium: Emerging Greenfield**
- Designated Cyberpark Kannur plots under development; active land and infrastructure planning.
 - Mattannur Airport proximity improves logistics; potential for integrated IT–industrial corridor.
 - **Ideal for:** Long-term investors seeking large, greenfield campuses; “build-to-scale” GCC models.



- Low: Niche/Satellite Node**
- Technopark Kollam active but smaller relative to Kozhikode / Thrissur.
 - Benefits from Thiruvananthapuram–Kollam IT corridor planning; satellite to Technopark.
 - Localized talent availability; lower-cost operations feasible.
 - **Ideal for:** Niche or district-level operations; satellite delivery hubs or greenfield projects.

Case Study

Case Study 1: Coimbatore





1

Historical & Institutional Backbone (Foundation for GCC Growth)

“Coimbatore’s robust institutional history sets a stable foundation for GCC growth”

Industrial Roots: Established legacy from Lakshmi Mills (1910) and Southern India Mills’ Association (SIMA) (1933)

Institutional Ecosystem:

- The South India Textile Research Association (SITRA) (1956)
- PSG Science & Technology Entrepreneurial Park (PSG-STEP) (1998)
- Tamil Nadu Industrial Development Corporation and Electronics Corporation of Tamil Nadu (TIDEL) Park Special Economic Zone (SEZ) (2010)

These institutions enabled strong R&D and innovation capabilities

2

Digital & Infrastructure Maturity

“Public–private infrastructure investments have strengthened digital readiness, catalyzing GCC viability”

- KGISL (1994), software parks, and STPI infrastructure fueled IT ecosystem
- Major investments from TCS, Wipro, and Cognizant catalyzed tech maturity

3

GCC Growth & Impact

“Coimbatore’s GCCs have transitioned from basic back-office operations to strategic, R&D-intensive global roles”

- Bosch — one of Coimbatore’s earliest and most mature GCCs, scaled to 5,000+ employees in embedded R&D
- State Street, GEP, Blue Yonder, Cameron, and Colruyt centers show capability maturity beyond traditional IT
- Strong presence in enterprise software, industrial, automotive, and digital domains (Schlumberger, Schneider Electric, Applied Materials, etc.)

4

Innovation, Sustainability & Talent

“Quality of life, innovation, and sustainability position Coimbatore as a long-term magnet for GCCs and top-tier talent”

- Forge Accelerator (2015), Merit’s AI Centre (2024), PSG Step, Amrita Technology Business Incubator (TBI), and Rathinam Incubation Center strengthened Coimbatore as a DeepTech start-up hub
- Ranked #7 in Ease of Living, supported by strong urban infrastructure, smart-city initiatives, and renewable energy adoption driving talent retention



The state’s skilling programs are being developed within a unified strategic framework that aligns talent creation closely with evolving industry demands.

WorkLabs Cell

Dedicated desk at Guidance for industry-academia collaboration to create future-ready workforce and a thriving innovation ecosystem in TN

1400+

Companies registered on the platform

300+

Courses Offered

4.13Mn+

Students trained in the last 3 years

200+

Partners

Key Learning: The most effective skill development ecosystems are built on an integrated, industry-led coalition that aligns government initiatives, academic institutions, and GCC employers under a unified strategic framework, ensuring talent creation directly meets industry demand.

Industry- Academia Linkage

Industry	Academic Partner	Outcome
	MIT, Anna University	Establishment of Flammability Lab
	DoT E	Work-integrated diploma program in Digital Manufacturing for 300 students in Hosur
	Higher Education	Establishment of 4 CoEs in Industry 4.0 Skills Development for MSMEs in 4 Government Engineering Colleges
	Singapore University of Technology and Design	Work-integrated diploma program in Digital Manufacturing for 300 students in Hosur
	Anna University	Establishment of Lionsbot R&D in Chennai – 200 employees
	GPT Coimbatore	R&D lab establishment, sandwich course, internships for 150 students
	GPT Vilupuram	Sandwich course and internships for 60 students



Case Study 2: Ahmedabad



1

Commercial legacy & education base as the foundation for GCC growth

"Ahmedabad's long-standing industrial-commercial culture and strong higher-education institutions give GCCs a stable, business-savvy foundation."

Industrial-business roots

- Traditional strength in textiles, chemicals, pharma, auto and engineering clusters (Naroda, Vatva, Sanand, etc.) has created deep capabilities in finance, supply chain, and manufacturing support services – natural adjacencies for GCC work.
- Rich institutional ecosystem Flagship institutes such as IIM Ahmedabad, IIT Gandhinagar, Nirma University, Gujarat University, and several specialised institutes (CEPT, MICA, Entrepreneurship Development Institute of India) feed a steady pipeline of business, tech and design talent.

2

Digital & Infrastructure Maturity

"Public-private infrastructure investments have pushed Ahmedabad from a traditional industrial hub to a digitally ready, globally connected GCC location."

- Gujarat International Finance Tec-City (GIFT City) between Ahmedabad and Gandhinagar is India's first International Financial Services Centre with a multi-services SEZ and domestic zone across ~886 acres.
- Ahmedabad has invested heavily in metro rail, BRTS, ring roads, smart-city corridors and precinct redevelopment (Law Garden–Mithakhali and other zones), improving commute times and livability around key business

3

GCC Growth & Policy Push

"Ahmedabad–Gandhinagar–GIFT City has moved from being an experimental Tier-2 location to one of India's most competitive GCC corridors."

- Global banks (JPMorgan, Bank of America, etc.), rating agencies, and tech firms such as IBM, Oracle, Capgemini, Google and Cognizant have established operations in GIFT's DTA/IFSC zones, signalling confidence in the location.
- Gujarat's GCC Policy 2025–30 explicitly aims to position the state as a leading destination for high-value GCCs through targeted CAPEX/OPEX subsidies, interest subvention and PF-linked employment incentives. Large companies such as Infineon and Technip Energies have announced plans to establish a large center.

4

Innovation, Quality of Life & Talent

"Ahmedabad's combination of safety, affordability and intellectual capital is turning it into a long-term magnet for GCC talent and leadership."

- Ahmedabad's startup ecosystem hosts 300+ startups and nearly \$280M in funding, with the city ranked #132 globally and recognized as a fast-improving hub, especially in SaaS, fintech and D2C.
- Ahmedabad ranked 3rd among 111 cities (and top-3 among million-plus cities) in India's Ease of Living Index Rapid growth in semiconductor and electronics programs, and rising female participation in engineering across Gujarat, are widening and diversifying the tech talent base that



The Ahmedabad's GCC landscape is emerging as a premier Tier-II destination, anchored by GIFT City's unique financial incentives and the state's GCC Policy (2025-30), which aims to attract 250 new units and ₹10,000 crore in investment.

Attractive Policy Support

Land & Infrastructure Incentives

CAPEX Subsidy

- Category I: (GFCI < ₹250 Cr):20% on building & fit-out; 30% on IT hardware & software (ceiling ₹50 Cr)
- Category II (GFCI ≥ ₹250 Cr or ≥ 500 jobs):Same rates, ceiling ₹200 Cr
- Disbursed over 20 quarterly instalments

Stamp Duty & Registration

- 100% reimbursement on lease or purchase of office premises

Electricity Duty Exemption

For Kerala, the key learnings are:

- 100% rebate for five years on industrial power tariffs
- Craft a strong narrative of why Kerala is a natural GCC hub.
- Anchor around one or two flagship corridors like Gujarat did with GIFT City.
- Provide a comprehensive, well-structured incentive stack (land, CAPEX, OPEX, talent, innovation).
- Back it with single-window governance and clear implementation rules.
- Hard-wire universities, startups, and quality of life into the policy, not as side notes.

Innovation & Ecosystem Enablement

IT/ITeS Policy Synergy

- GCCs incubating or accelerating start-ups can also tap Gujarat's IT/ITeS incentives

Co-location in Tech Parks

- Access to dedicated technology parks with plug-and-play infrastructure

Governance & Facilitation

Single-Point Facilitation Cell

- Operated by the Department of Science & Technology for approvals, policy guidance, and incentive disbursement

Implementation Guidelines

- Standardized procedures ensure rapid processing and quarterly performance tracking

Fiscal & Operational Support

OPEX Subsidy

Up to 15% of lease, bandwidth, cloud & power costs for 5 years; Annual caps of ₹20 Cr (Category I) / ₹40 Cr (Category II)

Employment Incentive

One-time grant of 50% of one month's CTC (Max ₹50K for men, ₹60K for women)

Other Support

Patent & Certification Support; EPF Reimbursement

Interest Subsidy

7% on term loans (up to 70% of GFCI); Max ₹1 Cr/year for 5 years

Skilling Grant

Up to ₹50K or % of course fees for professionals and graduates

If Kerala combines its natural advantages (talent, quality of life, diaspora) with this kind of structured GCC policy, it can position its cities as serious peers.

Case Study 3: Mysuru





Background: Karnataka has branded Mysuru as a Cybersecurity cluster

- KDEM's "Beyond Bengaluru" framework mentions Mysuru as a node for IT/ITES and cybersecurity clusters
- Steps have been taken to establish a Centre of Excellence (CoE) in cybersecurity in Mysuru, supported by the state and industry.
- Global Technology Centre (GTC) initiative at Mysuru is aimed to attract IT/BT firms.
- Training programs and skill initiatives are being pitched in engineering colleges to align young engineers with cybersecurity and digital roles.

Key Learnings

- **Domain Specialization Works:** Picking cybersecurity (or another niche) helps a city build distinctiveness rather than compete generically.
- **Tie policy + infrastructure + talent:** Mysuru's model links state policy (Beyond Bengaluru, KDEM), land/infrastructure (IT parks), and talent pipeline. This integrated approach is key.
- The Karnataka Cybersecurity Policy 2024 aims to build a robust digital defense ecosystem. It focuses on skill development, promoting research and innovation, supporting startups, and fostering partnerships
- **Events and Awareness:** Conferences like "CyberShield Mysuru" and the "Mysuru B.I.G. Tech Show" are organized to promote the city's potential, foster collaboration, and raise awareness about the growing importance of cybersecurity.

When comparing Kerala's cities (e.g., Kozhikode) or positioning them as GCC hub, the Mysuru case emphasizes that domain focus + readiness of infrastructure + policy clarity are critical.



Thank
you

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