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INDIA TIER-II & EMERGING CITIES ANALYSIS REPORT

AUGUST 2024

FOREWORD

Global Capability Centers (GCCs) in India have experienced significant growth since 2015, expanding from over 1,000 centers to more than 1,600 by FY2023. This growth not only reflects an increase in numbers but also a qualitative shift from basic operations to complex, multifunctional hubs, showcasing India's ascent in innovation and operational excellence.

Tier-II and Emerging cities are now becoming critical players in this landscape. With over 170 GCC units in FY2021, these cities have seen a compound annual growth rate (CAGR) of 11%, matching the growth rates of Tier-I cities. As of FY2023, they accommodate over 215 units. This expansion underscores their potential to serve as viable alternatives to the often saturated Tier-I cities, providing fertile ground for business resilience and innovation.

The Zinnov 'India Tier-II & Emerging City Analysis Report' delves into the evolving GCC ecosystems in these emerging cities. It highlights how they are becoming integral parts of the broader GCC network, complementing the primary hubs in Tier-I cities. This shift towards Tier-II locales not only broadens the scope of operations but also strengthens the overall capabilities of organizations, reinforcing their strategic resilience and operational robustness.

The report is an invaluable resource for business leaders, decision-makers, and strategic planners considering expansion or optimization of their Global Capability Centers (GCCs). It provides detailed insights into the growth dynamics and operational advantages of Tier-II and Tier-III cities in India. It offers a comprehensive analysis of these cities' evolving ecosystems, highlighting their growing importance as strategic locations for GCCs. By leveraging the findings and recommendations in this report, organizations can make informed decisions about site selection, talent acquisition, and operational strategies, ultimately enhancing their global competitiveness and innovation capabilities.

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1 India's Global Capability Centres have demonstrated a **remarkable growth** since 2015 and reflecting this transformative journey, **Tier-II and Emerging cities** are now gaining substantial recognition

2 The **GCCs** are **broadening their scope** in Tier-II cities, **extending beyond traditional transactional works** and processes to include strategic activities, capitalizing on the local innovation talent resources

3 The **growth of senior leadership** talent in **Tier-II cities** motivates firms to strategically place their operations there, harnessing this expertise for innovation and business growth

4 State programs like **"Beyond Bengaluru"** and **"Startup TN"** are key drivers for GCC expansion in Tier-II cities, offering financial and infrastructural incentives that attract investments and facilitate development

5 The development of international airports through the **"Regional Connectivity Scheme"** and **"UDAN"** has enhanced connectivity from major destinations

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6 The Tier-II and Emerging cities which housed over **170 GCC units** in **FY 2021**, have experienced a **CAGR of 11%** matching the growth rate of Tier-I cities, and now accommodate more than 215 units

7 The **talent pool** within the GCC sector in the emerging Tier-II locations has surged at a **CAGR of ~13%**, raising from **56K+** to **71K+**

8 The Tier-II & Emerging cities boast an impressive **average talent pool** exceeding **240K**, with **senior leadership roles** comprising **more than 28%** of this demographic

9 The **average** number of professionals **willing to migrate** to Tier-II and Emerging cities is **2.2 times** their existing **installed talent base**

10 **Ahmedabad, Coimbatore, Kolkata and Thiruvananthapuram** account for around **50%** of the **GCC units** situated in India's Tier-II cities

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What are the key challenges organizations face in Tier-I cities, prompting them to seek alternatives?

Escalating Real Estate and Operational Expenses

Companies in Tier-I cities encounter substantial real estate and operational expenditures, with costs for office premises and utilities approximately 60% - 80% higher than other cities, indicating a notable financial strain

Increasing Talent Attrition

Tier-I cities face significant challenges in attracting and retaining skilled talent due to notable employee turnover, with an average attrition rate of 15.2%

Deteriorating Quality of Life

In Tier-I cities, individuals continue to experience a decline in quality of life, exacerbated by increasing traffic congestion, pollution, and environmental challenges

Increasing Infrastructure Stress

Tier-I cities are contending with significant infrastructure challenges, as demonstrated by problems like water shortages and rising rental costs

Limited Incentives to Tier-I Cities

In Tier-I cities, government incentives to establish operations are becoming increasingly limited, marked by the reduction or elimination of tax exemptions

Regulatory Complexity

Companies in expanding Tier-I cities must navigate dynamic regulatory requirements which incurs additional costs and added administrative hurdles

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Zinnov's Tier-II location evaluation employs a rigorous framework of 6 pillars and 22 sub-pillars

TALENT ADVANTAGE $X_1\%$	Availability	Talent Cost	Migratable Pool	Demand Supply Gap
Advantage that the city offers in terms of availability of relevant talent				

ECOSYSTEM FAVOURABILITY $X_2\%$	Number of Peer Companies	Number of Academic Institutions	Number of Service Providers (SPs)	Number of Start-ups
Favourability of the local ecosystem in terms of maturity of partner* ecosystem, Peer presence and Academia				

SOCIAL ATTRACTIVENESS $X_3\%$	Cost of Living and Inflation	Pollution	Diversity	Weather	Crime Rate
Advantage that the city offers in terms of social parameters and quality of life					

CONNECTIVITY TO HUB $X_4\%$	Distance	Cost	Frequency	Duration
Connectivity of the city with the nearest hub (Tier-I) location (Air, Rail and Road)				

BUSINESS ENVIRONMENT $X_5\%$	Ease of Doing Business	Political Stability and Government Regulations
Factors that make it easier to do business for an organization		

CLIMATE VULNERABILITY $X_6\%$	Exposure to Extreme Events	Sensitivity	Adaptive Capacity
City's vulnerability to disruptions in daily operations due to extreme climate			

X% Weightages to individual parameters   **ΣXn% = 100%** The total sum of the individual pillars equates to 100%   When read horizontally, the sum of individual sub pillars within each pillar equals 100%

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Top 20 Tier-II Cities* with GCC presence ranked, while 6 Emerging Cities highlighted for growth potential

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Left column	Rank
Jaipur	7
Vadodara	5
Ahmedabad	1
Surat	
Aurangabad	19
Nashik	
Goa	16
Belagavi	
Hubballi-Dharwad	
Mangaluru	15
Mysuru	9
Kochi	12
Thiruvananthapuram	10

Rank	Right column
4	Chandigarh
6	Indore
	Warangal
8	Lucknow
18	Nagpur
2	Kolkata
11	Bhubaneswar
13	Visakhapatnam
14	Salem
	Tiruchirappalli
3	Coimbatore
17	Madurai
20	Tirunelveli

*Disclaimer: Any city that has fewer than 100 GCC units or a total installed GCC talent of below 100K qualifies as a Tier-II GCC Location

City Ranking   ♥ Tier-II City   ♥ Emerging City   Note: Map not to scale

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Tier-II and Emerging cities boast significant IT and BPM talent while growing niche skill capabilities (1/3)

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Talent Availability ⟶	ER&D	IT	BPM	Niche
Ahmedabad	🟢	🟢	🟢	🟢
Kolkata	🟢	🟢	🟢	🟢
Coimbatore	🟢	🟢	🟢	🟢
Chandigarh	🔴	🟢	🔴	🔴
Vadodara	🟢	🟢	🟢	🔴
Indore	🟢	🟢	🟢	🟢
Jaipur	🟢	🟢	🟢	🟢
Lucknow	🟢	🟢	🟢	🟢
Mysuru	🔴	🔴	🟠	🟠

Source: Zinnov Research and Analysis

🟦 Tier-II City 🟧 Emerging City

Installed Talent 🟢 >50K 🔴 20K-50K 🟠 <20K

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Tier-II and Emerging cities boast significant IT and BPM talent while growing niche skill capabilities (2/3)

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Talent Availability ➡️	ER&D	IT	BPM	Niche
Thiruvananthapuram	🔴	🟠	🟠	🔴
Bhubaneswar	🔴	🟢	🔴	🔴
Kochi	🔴	🔴	🔴	🔴
Visakhapatnam	🔴	🔴	🔴	🔴
Salem	🟠	🟠	🟠	🟠
Mangaluru	🟠	🟠	🟠	🟠
Goa	🟠	🔴	🔴	🟠
Madurai	🔴	🔴	🔴	🔴
Nagpur	🟢	🟢	🟢	🟢

Source: Zinnov Research and Analysis

🟦 Tier-II City 🟧 Emerging City

Installed Talent 🟢 >50K 🔴 20K-50K 🟠 <20K

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Tier-II and Emerging cities boast significant IT and BPM talent while growing niche skill capabilities (3/3)

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Talent Availability →	ER&D	IT	BPM	Niche
Aurangabad	🔴	🔴	🔴	🟠
Tirunelveli	🟠	🟠	🟠	🟠
Surat	🟢	🟢	🔴	🔴
Nashik	🔴	🔴	🔴	🔴
Belagavi	🔴	🟠	🟠	🟠
Hubballi-Dharwad	🟠	🟠	🟠	🟠
Warangal	🟠	🟠	🟠	🟠
Tiruchirappalli	🟠	🟠	🟠	🟠

Key Insights

- The significant talent pool and robust ecosystem in cities like Ahmedabad, Kolkata, and Coimbatore contribute to enhanced scalability of functions compared to cities such as Thiruvananthapuram, Nagpur, and Lucknow.
- A notable transition is occurring in the nature of work, moving from BPM and IT to ER&D-focused work portfolios

Source: Zinnov Research and Analysis

🟦 Tier-II City   🟧 Emerging City

Installed Talent   🟢 >50K   🔴 20K-50K   🟠 <20K

GCC Expansion and Setups in Tier-II Cities in India (FY 2022-24) (1/2)

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COMPANY NAME	LOCATION	SETUP/EXPANSION	NATURE OF WORK DONE
TREEZ POWERING RETAIL COMMERCE	Thiruvananthapuram	Setup (Q2 2022)	The setup is aimed at developing new products and enhancements for its existing Cloud commerce platforms such as Point of Sale (PoS), Inventory Management, Customer Management, Omnichannel Sales, Catalog Management, Data Analytics, etc
IBM	Kochi	Expansion (Q2 2022)	The expansion of IBM Labs to Kochi is aimed at augmenting development of a next generation software portfolio and expanding cloud offerings
IBM	Ahmedabad	Expansion (Q3 2022)	The center focuses on Product Engineering, Design, and Development of new products and solutions in the areas of Security, Sustainability Software, Data & AI, and Automation
DIAGEO	Goa	Expansion (Q3 2022)	The Diageo Goa center is aimed at accelerating transformational innovation and strengthening its craft and premium liquor portfolio. Spread across 4 acres, it offers robust, end-to-end capabilities addressing various requirements such as distillation capabilities for Malt, Gin and Rum, maturation infrastructure and blending capability for spirits, an automated bottling and packaging line for craft spirits, and a modern warehouse for incoming and finished products
calsoft	Kolkata	Expansion (Q3 2022)	The center is aimed at achieving advanced levels of digital product engineering capabilities in AI/ML, Cybersecurity and Data Analytics domains by housing expert product engineers and data scientists
ThoughtSpot	Thiruvananthapuram	Expansion (Q3 2022)	The center was the third R&D center in India, the investment fuels continued product innovation for the Modern Analytics Cloud, empowering every company to build their business on data

GCC Expansion and Setups in Tier-II Cities in India (FY 2022-24) (2/2)

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COMPANY NAME	LOCATION	SETUP/EXPANSION	NATURE OF WORK DONE
IBM	Bhubaneswar	Expansion (Q4 2022)	IBM's Bhubaneswar center is aimed at fast-tracking the digital transformation and economic growth of the region while also continuing to strengthen Hybrid AI and Consulting capabilities
o9	Coimbatore	Expansion (Q4 2022)	o9's second delivery center will enable the organization to further extend its service delivery capabilities in the region
Pernod Ricard	Nashik	Expansion (Q1 2023)	The center will cater to strengthening the company's expertise in whiskeys, white and brown spirits, non-alcoholic beverages, and accelerating the Govt. of India's vision of 'Aatmanirbhar Bharat' committing to innovating, investing and manufacturing in India
flex	Coimbatore	Expansion (Q1 2023)	The center is aimed at providing services in support of the company's global operations in the areas of procurement and supply chain, finance, engineering and quality, program management, IT, HR and others
Metso	Vadodara	Expansion (Q1 2023)	The new facility will grow with 250 specialists covering several functions and capabilities, including engineering for various products, modernizations and upgrades, quotation support, logistics, procurement, and training and learning professionals
DEP Detroit Engineered Products	Tirunelveli	Expansion (Q1 2023)	Focuses on strengthening EV applications for two, three and four wheelers. It encompasses hardware design and electro-mechanical product development for customers
Kraft Heinz	Ahmedabad	Setup (Q3 2023)	The Ahmedabad facility of Kraft Heinz Company is a dedicated facility established to centralize and enhance specific business functions such as IT, Finance, GBS, and Supply Chain

Tier-II and Emerging cities provide a superior quality of life, characterized by lower pollution levels, comparable safety standards, and enhanced workplace diversity (1/3)

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To be read horizontally ⟶

	Crime Index	Pollution (PM 2.5)	Average Temperature	Diversity
Ahmedabad	🟠	🟠	🟠	🟠
Kolkata	🟠	🔴	🟠	🟠
Coimbatore	🟠	🟠	🟠	🟠
Chandigarh	🟠	🟠	🟠	🟠
Vadodara	🟠	🔴	🟠	🟠
Indore	🟠	🟠	🟠	🟠
Jaipur	🟠	🔴	🟠	🟠
Lucknow	🟠	🔴	🟠	🟠
Mysuru	🟠	🟠	🟠	🟠

■ Tier-II City ■ Emerging City

Compared to National Average	Compared to National Average	Compared to National Average	Compared to National Average
🟢 <70% 🔴 70%-130% 🟠 >130%	🟢 <70% 🔴 70%-130% 🟠 >130%	🟢 <70% 🔴 70%-130% 🟠 >130%	🟢 >130% 🔴 70%-130% 🟠 <70%

Key Insights

- Among all the Tier-II and Emerging cities, **Salem** is recognized as the **safest**, with **Mangaluru** and **Vadodara** following in terms of safety rankings
- **Madurai** is ranked as the least polluted city among them, boasting a very low PM2.5 concentration in stark contrast to **Kolkata**, which faces more significant challenges with its PM2.5 levels

Tier-II and Emerging cities provide a superior quality of life, characterized by lower pollution levels, comparable safety standards, and enhanced workplace diversity (2/3)

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To be read horizontally ➡️

	Crime Index	Pollution (PM 2.5)	Average Temperature	Diversity
Thiruvananthapuram	🟠	🟠	🟠	🟠
Bhubaneswar	🟠	🟠	🟠	🟠
Kochi	🟠	🟠	🟠	🟠
Visakhapatnam	🟠	🟠	🟠	🟢
Salem	🟢	🔴	🟠	🟠
Mangaluru	🟢	🟠	🟠	🟢
Goa	🟠	🟢	🟠	🟠
Madurai	🟠	🟢	🟠	🟠
Nagpur	🟠	🟠	🟠	🟠

Compared to National Average			Compared to National Average			Compared to National Average			Compared to National Average		
🟢 <70%	🔴 70%-130%	🟠 >130%	🟢 <70%	🔴 70%-130%	🟠 >130%	🟢 <70%	🔴 70%-130%	🟠 >130%	🟢 >130%	🔴 70%-130%	🟠 <70%

🟦 Tier-II City 🟥 Emerging City

Key Insights

- The average annual temperature across all Tier-II and Emerging cities has remained relatively stable, exhibiting a deviation of only ±10%, with the Tier-II and Emerging cities maintaining an **average annual temperature** of **26.4** degrees Celsius
- Among the Tier-II and Emerging cities, **Chandigarh** is identified as the coolest, while **Madurai** stands out as the hottest

Tier-II and Emerging cities provide a superior quality of life, characterized by lower pollution levels, comparable safety standards, and enhanced workplace diversity (3/3)

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To be read horizontally →	🛡 Crime Index	🏭 Pollution (PM 2.5)	🌡 Average Temperature	🚹🚺 Diversity
Aurangabad	🟠	🟢	🟠	🔴
Tirunelveli	🟠	🟠	🟠	🟠
Surat	🟠	🟠	🟠	🟠
Nashik	🟢	🟠	🟠	🟠
Belagavi	🔴	🟢	🟠	🟠
Hubballi-Dharwad	🟠	🔴	🟠	
Warangal	🟢	🟠	🟠	🟠
Tiruchirappalli	🟠	🟢	🟠	🟠

	Compared to National Average	Compared to National Average	Compared to National Average	Compared to National Average
	🟢 <70% 🔴 70%-130% 🟠 >130%	🟢 <70% 🔴 70%-130% 🟠 >130%	🟢 <70% 🔴 70%-130% 🟠 >130%	🟢 >130% 🔴 70%-130% 🟠 <70%

🟦 Tier-II City 🟧 Emerging City

Key Insights

- Tier-II and Emerging cities continue to exhibit high workplace diversity, maintaining an average workplace **diversity rate of 34%**
- **Visakhapatnam** and **Mangaluru** lead in this aspect, boasting workplace diversity rates exceeding 40%, while **Aurangabad** has the lowest rate at 21.5%

Union and State Governments' joint efforts are elevating connectivity, propelling Tier-II and Emerging cities onto the global stage (1/3)

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To be read horizontally →	International Airport	Domestic Airport	Vande Bharat Express*	Shatabdi Express*	Rajdhani Express*
Ahmedabad	✈	✈	🚆	🚆	🚆
Kolkata	✈	✈	🚆	🚆	🚆
Coimbatore	✈	✈	🚆	🚆	🚆
Chandigarh	✈	✈	🚆	🚆	🚆
Vadodara	—	✈	🚆	🚆	🚆
Indore	✈	✈	🚆	🚆	🚆
Jaipur	✈	✈	🚆	🚆	🚆
Lucknow	✈	✈	🚆	🚆	🚆
Mysuru	—	✈	🚆	🚆	🚆

Key Insights

- In India, **40% of the Tier-II & Emerging cities** are equipped with both international and domestic airports, significantly enhancing travel convenience
- Through various government initiatives, **every Tier-II & Emerging city**, along with other emerging cities, now features a domestic airport, reflecting a significant advancement in regional connectivity

■ Tier-II City   ■ Emerging City

*The Shatabdi, Rajdhani and Vande Bharat Express are major train routes of the Indian Railways.

Union and State Governments' joint efforts are elevating connectivity, propelling Tier-II and Emerging cities onto the global stage (2/3)

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To be read horizontally ➔	International Airport	Domestic Airport	Vande Bharat Express	Shatabdi Express	Rajdhani Express
Thiruvananthapuram	✈	✈	🚆	—	🚆
Bhubaneswar	✈	✈	🚆	🚆	🚆
Kochi	✈	✈	🚆	—	🚆
Visakhapatnam	✈	✈	🚆	🚆	—
Salem	—	✈	🚆	🚆	🚆
Mangaluru	✈	✈	🚆	—	🚆
Goa	✈	✈	🚆	—	🚆
Madurai	✈	✈	🚆	—	—
Nagpur	✈	✈	🚆	—	🚆

Key Insights

- The Vande Bharat train, a medium-distance superfast express service initiative is enhancing connectivity by linking Tier-II and Emerging cities with premier Tier-I cities, marking a significant milestone in intercity travel infrastructure. 96% of Tier-II and emerging destinations are accessible by train

- Half of the Tier-II and Emerging cities are connected by the Rajdhani Express, improving accessibility to major urban centers

Source: Zinnov Research and Analysis

■ Tier-II City ■ Emerging City

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Union and State Governments' joint efforts are elevating connectivity, propelling Tier-II and Emerging cities onto the global stage (3/3)

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To be read horizontally →	International Airport	Domestic Airport	Vande Bharat Express	Shatabdi Express	Rajdhani Express
Aurangabad	—	✈	—	—	—
Tirunelveli*	—	—	🚆	—	—
Surat	✈	✈	🚆	🚆	🚆
Nashik	—	✈	🚆	—	🚆
Belagavi	✈	✈	🚆	—	—
Hubballi-Dharwad	—	✈	🚆	—	🚆
Warangal	—	✈	🚆	—	🚆
Tiruchirappalli	—	✈	🚆	—	🚆

Key Insights

- There is a noticeable gap in connectivity, as **approximately 30%** of the locations are not yet served by express trains like the Shatabdi, indicating a need for expanded service to these areas

Source: Zinnov Research and Analysis   *Nearest airport to Tirunelveli is situated in Tuticorin, 46 kms away from the city centre   ■ Tier-II City ■ Emerging City

Governments have not only enhanced connectivity in Tier-II and Emerging cities but also continue to offer tax and capital incentives to foster a more favorable business environment

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The Gujarat Semiconductor Policy 2022-27 offers significant **subsidies for land, power, and water tariffs** to support the Electronic System Design and Manufacturing (ESDM) sector in the State and accelerate project execution

The Madhya Pradesh IT, ITeS*& ESDM+ Investment Promotion Policy 2023 encourages investment in these key sectors by providing **25% capital expenditure assistance** on Gross Fixed Capital Investment, to promote technological and industrial growth in the state

The **Maharashtra IT-ITES Policy 2023** empowers IT companies to establish tech parks throughout the state, providing attractive incentives such as 50 to 100 percent subsidies on stamp duty (a tax imposed on the sale of property/property ownership) and a waiver on **electricity charges for 10 to 15 years**

The **Goa Logistics and Warehouse Policy 2023** provides up to 15% interest in capital subsidies on annual interest payments for companies undertaking construction projects especially in underdeveloped areas. Additionally, there is a dedicated **Rs 10 Mn fund to support start-ups**

The Odisha Semiconductor Policy 2023 **provides 50% Capital expenditure assistance** and reduced-rate land leases. Projects over INR 50,000 Million get a 25% land discount

The **Karnataka Data Centre Policy 2022-27** encourages the setup of data centers beyond Bengaluru Urban district by providing **a one-time capital subsidy of up to 7%**

The **Kerala Industrial Policy 2023** aims to cultivate an entrepreneurial environment and excellence clusters by improving infrastructure, and encouraging the creation of **Industry 4.0 Centres of Excellence (CoEs) via a Public-Private Partnership (PPP)**

The **Tamil Nadu Startup and Innovation Policy 2023** plans to establish Tamil Nadu as a leading start-up hub globally by outlining more than 50 action points to nurture a start-up-friendly climate
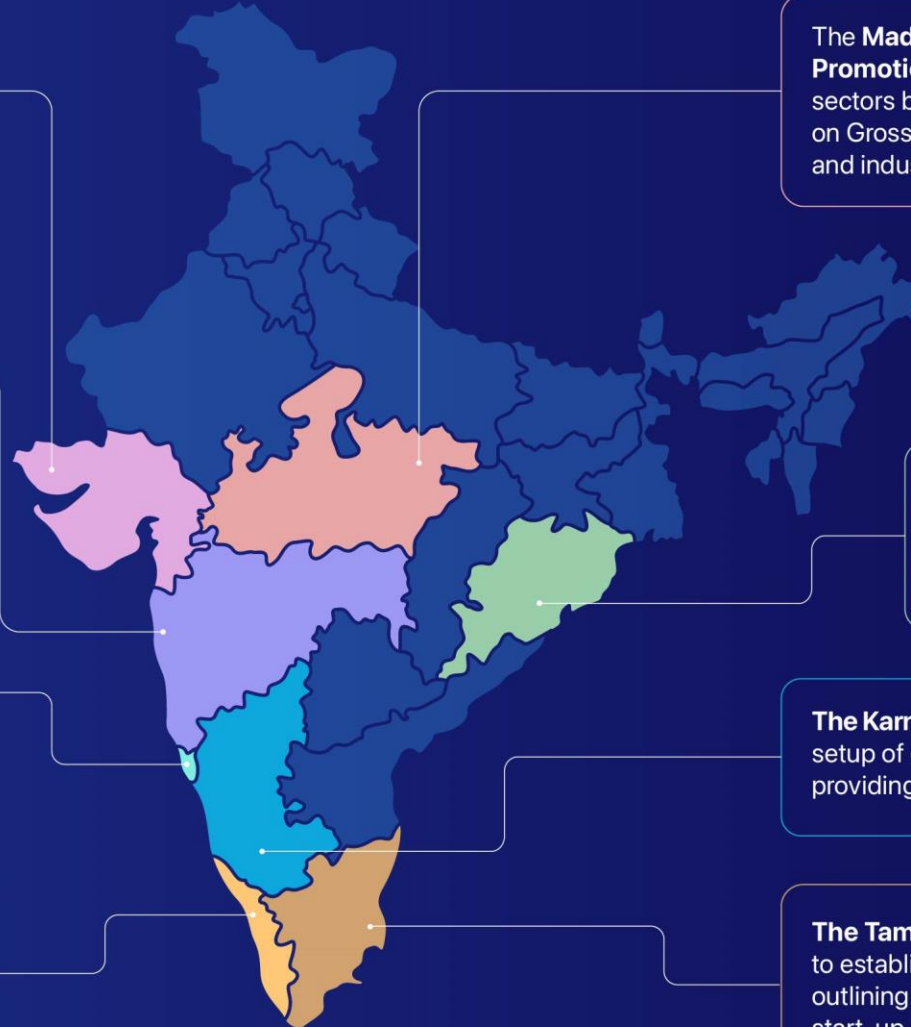
Tier-II cities present a notable climate resilience, exhibiting less vulnerability to climate change compared to their Tier-I counterparts (1/2)

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Ahmedabad	**Jaipur**
Kolkata	**Lucknow**
Coimbatore	**Mysuru**
Chandigarh	**Thiruvananthapuram**
Vadodara	**Bhubaneshwar**
Indore	**Kochi**
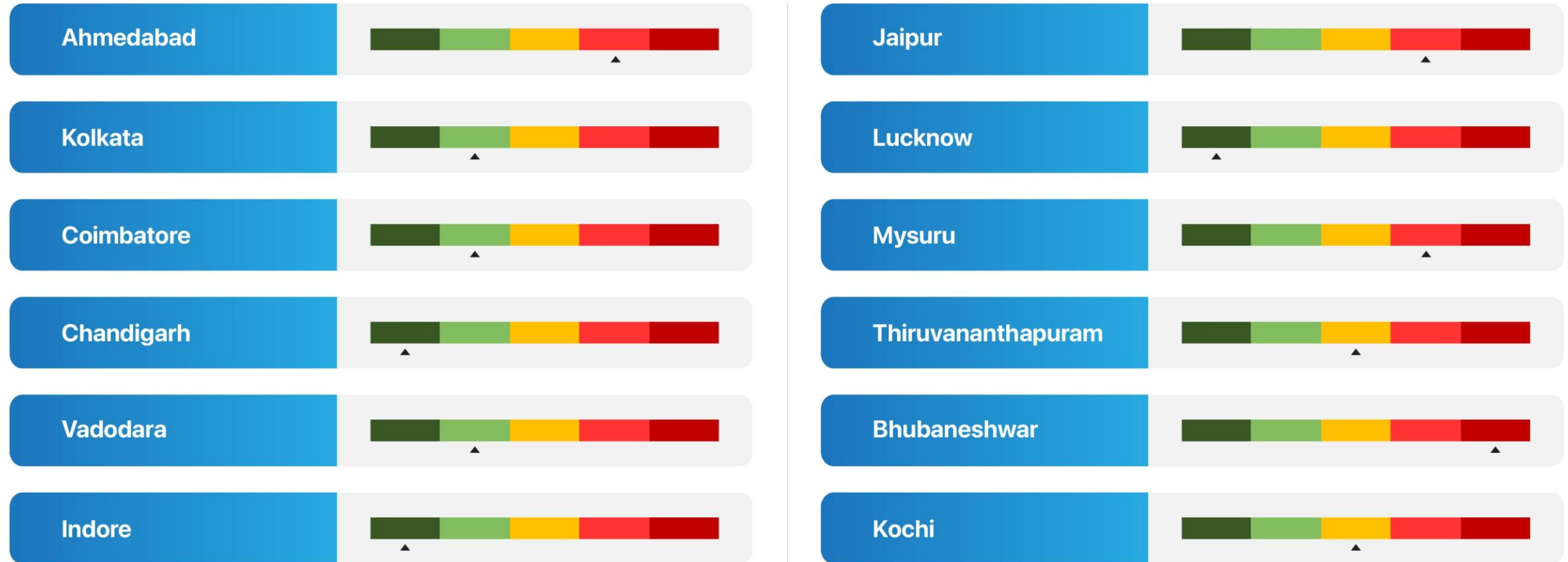
Key Insights

- Amongst the Tier-II & Emerging cities, Indore, Lucknow, Salem show resilience to climate change with very low vulnerability to changes
- The majority of Tier-II & Emerging cities fall within the "**Low**" to "**Moderate**" range regarding climate vulnerability, offering more favorable conditions for development compared to Tier-I cities, which predominantly lie in the "**High**" to "**Very High**" vulnerability zone

Tier-II cities present a notable climate resilience, exhibiting less vulnerability to climate change compared to their Tier-I counterparts (2/2)
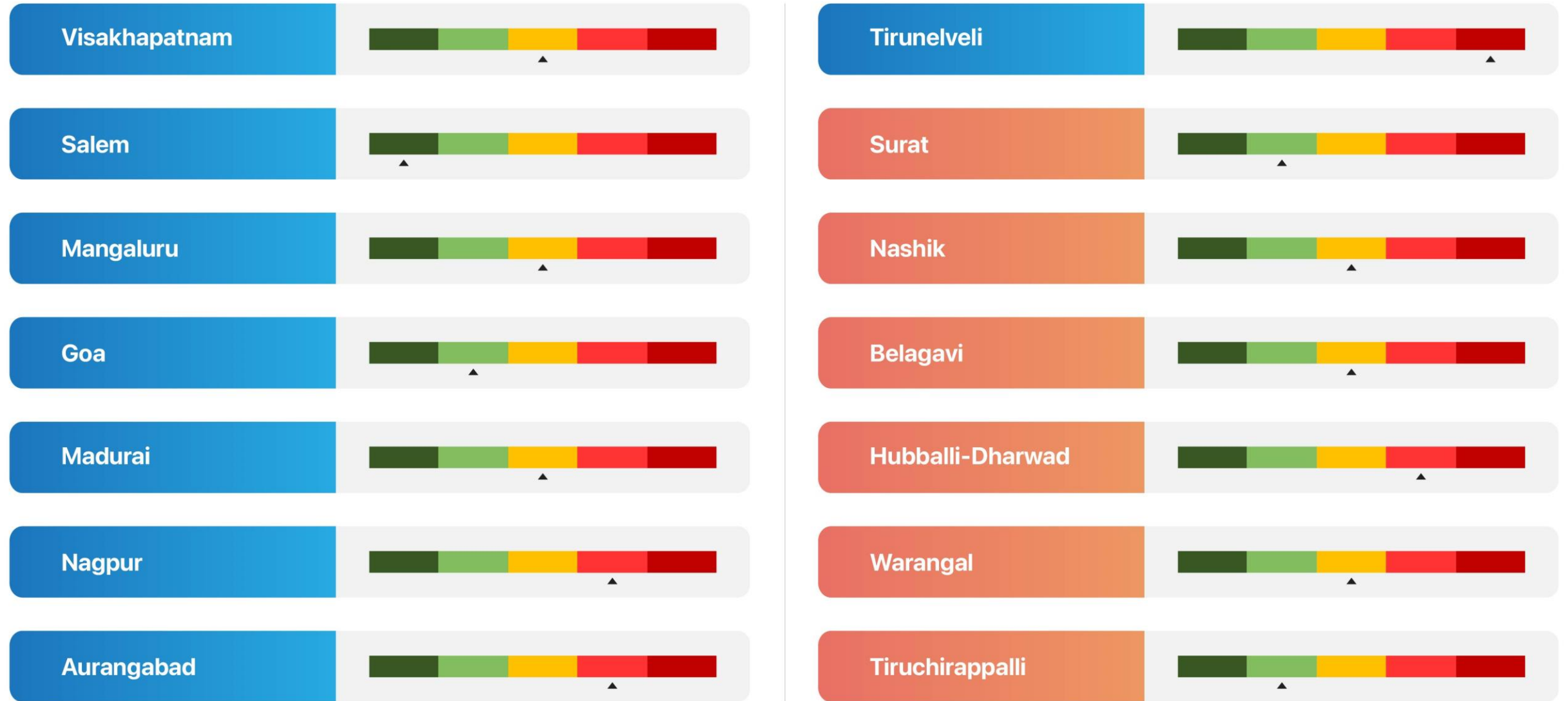
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Visakhapatnam

Salem

Mangaluru

Goa

Madurai

Nagpur

Aurangabad

Tirunelveli

Surat

Nashik

Belagavi

Hubballi-Dharwad

Warangal

Tiruchirappalli

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How can Zinnov help GCCs gain the location advantage over their peers?

TALENT ADVANTAGE
- Cost Evaluation for Specific Job Families and Individual Roles
- Understanding the Demand and Supply Across Job Families
- Availability of Talent Across Various Job Roles and Job Families
- Assessment of Scalability (eg: scaling the team from 100 to 500/1000 in a particular location) Potential for Tailored Job Families

ECOSYSTEM FAVOURABILITY
- Comparative Analysis of Peer Companies within Specific Industry Verticals
- Ecosystem of Service Providers Serving Various Industry Verticals and within specific industry verticals
- Analysis of fresh talent availability is specific to each job role and job family, complemented by strategies for hiring and branding aimed at the fresh talent pool
- Evaluation of the Innovation Ecosystem present in particular location and particular vertical

SOCIAL ATTRACTIVENESS
- Analysis of Cost of Living in Specific Cities, Incorporating Commercial Land Expenses
- Analysis of conducive weather conditions for the cities specific to industry verticals

CONNECTIVITY TO HUB
- Evaluation of Travel Feasibility Across Various Modes of Transportation
- Assessment of Location Connectivity Focusing on Optimal Travel Modes and the Presence of International and Domestic Airports

BUSINESS ENVIRONMENT
- In-depth Examination of Targeted Government Incentives for Key Industries and Functions, Including a Detailed Review of Rebates and Concessions Offered
- Comprehensive Analysis of Diplomatic Favorability for International Locations and Inter-State Relations Within the Domestic Context

CLIMATE VULNERABILITY
- Analysis of vulnerabilities unique to each city, considering environmental, infrastructural, and socio-economic factors

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ABOUT ZINNOV

Founded in 2002, Zinnov is a leading global management consulting and strategy advisory firm, with a presence in 10 global locations including New York, Santa Clara, Seattle, Houston, Paris, Gurgaon, Bangalore, Tokyo, and Pune. In the last 22 years, Zinnov has partnered with Global Enterprises and Fortune 2000 companies across their value creation journey to develop actionable insights — across revenue, talent, innovation, scale, and optimization.

As part of the GCC Accelerator Platform (GAP) Practice, we work as a trusted partner to our clients to drive strategic value from the GCC. We work together with our customers to identify, develop, and operationalize growth strategies that create and scale efficiencies, enhance center maturity, and build best-in-class talent for resilience and innovation. Leveraging the power of data, networks, and analyses, the GAP Practice enables GCC leaders to identify and prioritize strategic initiatives and geo-specific insights to drive maximum organizational value.

Our areas of expertise include —

Growth & Operations: We help our customers distil and unlock center value with a curation of compelling growth strategies, deeply aligned to the organization's business priorities. We work alongside our clients to define and operationalize transformational strategies across multiple rungs of the GCC.

Innovation & Collaboration: We bring the necessary cross-functional expertise to accelerate our customers' innovation journey and drive tangible business outcomes through custom collaboration and open innovation programs. We design a comprehensive innovation strategy that goes beyond a broad stroke alignment and focuses on redefining what is possible in terms of innovation and collaboration.

Talent Strategy & Excellence: We partner with our customers to outline a custom approach for talent engagement — across a hybrid/remote workforce model, aimed at identifying and assessing existing talent strategies and defining new-age approaches for high-value talent engagement and performance.

Technology: We work alongside our GCC customers to identify and prioritize the right Automation opportunities, and to support the full spectrum of possibilities to derive maximum value from initiatives. We outline and implement strong Automation programs to enable organizations to map investments to business strategy, identify, reimagine, and prioritize Automation projects, develop a long-term Automation roadmap to drive success, and set up a world-class Automation COE evangelize the technology across the GCC.

Thought Leadership & POV: We provide a specialized and customized approach to communicate the GCC's unique perspectives on industry trends and challenges to external senior stakeholders. We develop compelling thought leadership through research reports, strategy presentations, keynotes, custom playbooks, executive briefings, and whitepapers to address the latest industry trends and challenges.

For more information, visit: **www.zinnov.com**

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