

Xpheno

TELANGANA: THE NEXT-GEN GCC POWERHOUSE

OCTOBER 2025



Table of Contents

Executive Summary – Kamal Karanth, Co-Founder, Xpheno	3
India GCCs - Hotspots	4
Telangana GCCs – Talent Landscape	6
Telangana GCCs – Top Employers	13
Net Talent Balance – India GCCs	16
Telangana GCCs – Talent Movement Corridors	19
Dipstick on Hyderabad Greenfield GCCs	24
Talent Desirability	28
Telangana GCCs – Talent Summary	30

Telangana: The Next-Gen GCC Powerhouse

Would you recommend Telangana as a location of choice for a new GCC (Global Capability Center) setup? How about recommending the state to a Finance Professional, Tech Engineer or a Science graduate to build a GCC career? Does the state host marquee GCCs that offer substantial career options on a long-term basis? Would you like to understand the readily employable skills and the top employers & competitors for talent in Telangana? Would understanding the talent corridors in and out of the State help you decide if you can build your next generation of talent here?

This report holds answers for most, if not all, of these questions.

This workforce research release from Xpheno focuses on various talent dimensions & sectoral dynamics that make Telangana a high-potential powerhouse for hosting GCCs. If there is a city built out with foresight and sustained the vision over decades of development, it must be Hyderabad. The City of Pearls is fast emerging as a location of interest for global enterprises, specialist talent, market analysts and industry observers alike.

Telangana has an active and accessible white-collar talent base of 47.80 Lakh. Talent pool with minimum working experience of 1 Year is 23.30 Lakh, accounting for 49% of the active talent pool.

This 35-minute read gives you a ready reckoner of readily deployable talent, top employers, the GCC talent dimension, academic output break-up, leadership mix and most of the things you may want to analyze from a talent landscape perspective.

The GCCs Talent Highlights

- GCCs in Telangana currently employ a total of 3.10 Lakh employees across the state. The GCC talent pool accounts for 6% of the total active white-collar talent pool of the State and 13% of the experienced talent pool.
- In our study of talent movement corridors, Telangana's GCCs collectively achieved Positive Talent Balance status with 13K+ talent absorptions and 7K+ talent lost during the 12-month period.
- Telangana's GCCs collectively hold over 3500+ active senior leaders across different enterprise functions. 96% of this leadership pool are senior talent holding operational & strategic leadership roles.
- Telangana's GCCs with a strong lineup of international marquee brands as employers, significantly contribute to Telangana's desirability among jobseekers. Over 19 Lakh jobseekers, from other states have stated Telangana as a preferred job location.

Powered by infrastructure, talent & policies, **Telangana understandably has seen the highest number of Greenfield GCCs over the last 3 years and holds potential to lead this segment.**

Kamal Karanth
Co-founder
Xpheno Private Limited



India GCCs - Hotspots

NUMBERS TO REMEMBER...

INDIA IS HOST TO NEARLY **50%** OF GCCs WORLDWIDE

EMPLOYS OVER **1.9Mn** PEOPLE. SET TO GROW TO **2.5 – 2.8Mn** BY 2030

GENERATED **65 Bn\$** REVENUE IN FISCAL2024. SET TO REACH **100 – 110 Bn\$** BY 2030

NEARLY **7000** GLOBAL ROLES OPERATE FROM INDIAN GCCs. SET TO CROSS **30K** BY 2030

INDIA GCCs - HOTSPOTS

LOCATIONS BY GCC UNITS & HEADCOUNT

#2 NCR
475+ GCC UNITS
275K+ TALENT

HARYANA - TIER 2 CENTERS
CHANDIGARH

#3 MUMBAI
375+ GCC UNITS
210K+ TALENT

#4 PUNE
370+ GCC UNITS
200K+ TALENT

#1 BENGALURU
890+ GCC UNITS
740K+ TALENT

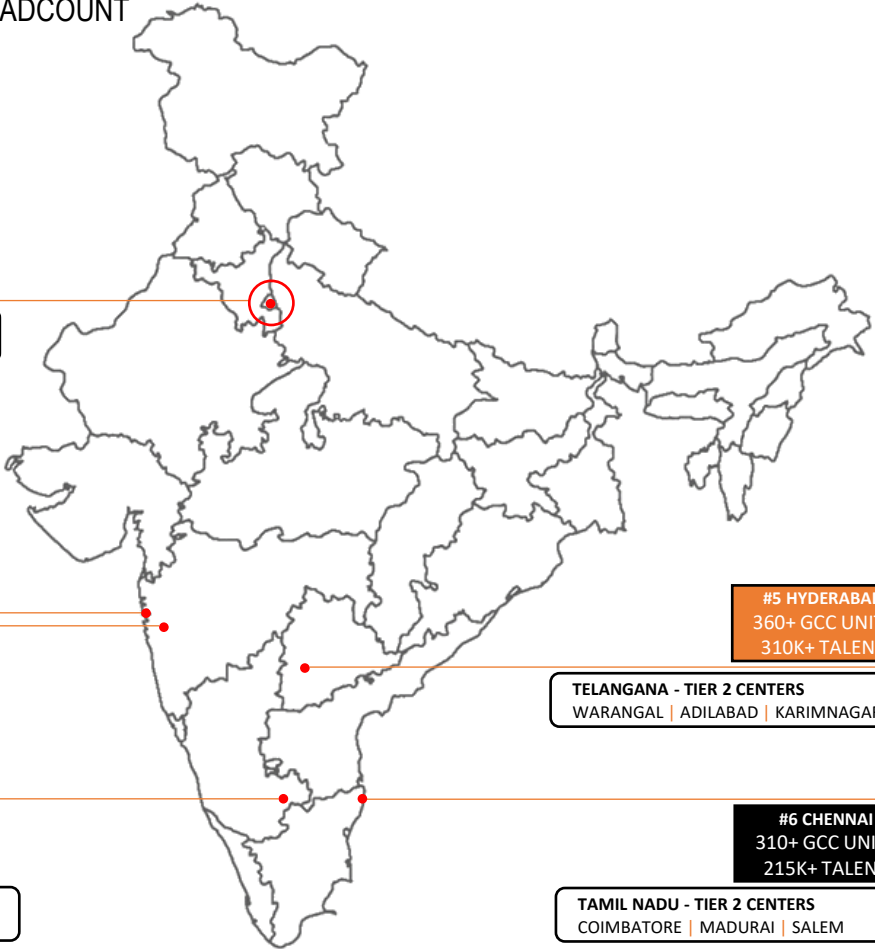
KARNATAKA - TIER 2 CENTERS
MANGALURU | MYSURU

#5 HYDERABAD
360+ GCC UNITS
310K+ TALENT

TELANGANA - TIER 2 CENTERS
WARANGAL | ADILABAD | KARIMNAGAR

#6 CHENNAI
310+ GCC UNITS
215K+ TALENT

TAMIL NADU - TIER 2 CENTERS
COIMBATORE | MADURAI | SALEM



SECTION A1

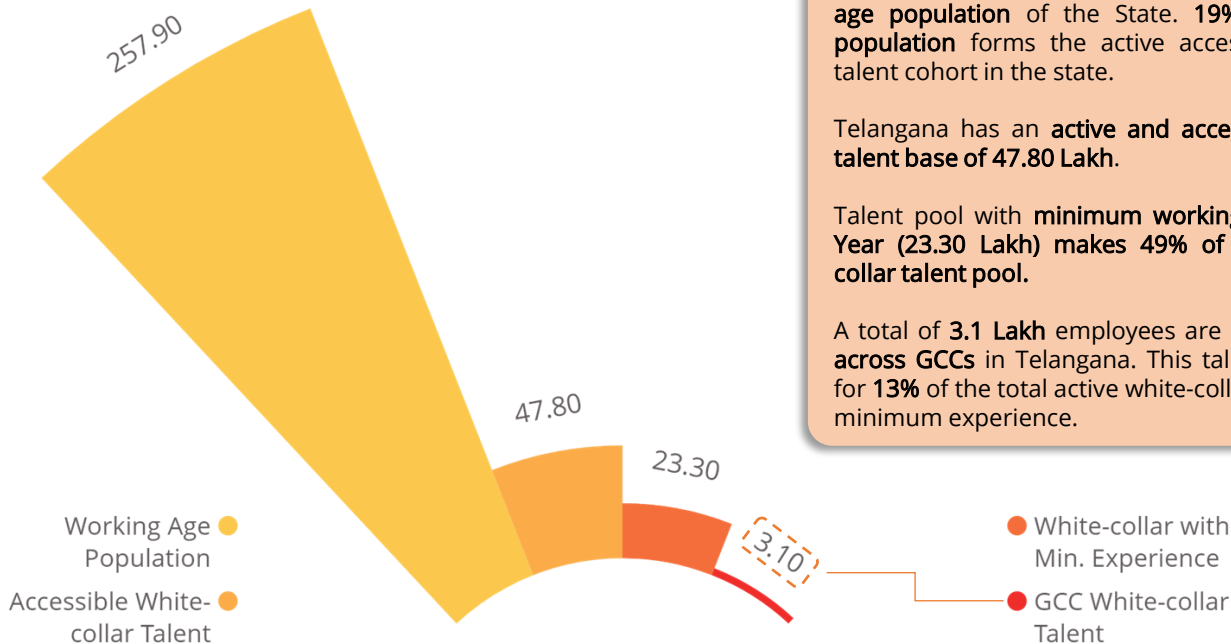
GCCs Talent Landscape

Telangana



TELANGANA ACTIVE TALENT SNAPSHOT

HUMAN CAPITAL SUMMARY



* Numbers in Lakh

67% of Telangana's population qualifies as **working age population** of the State. **19% of the working population** forms the active accessible white-collar talent cohort in the state.

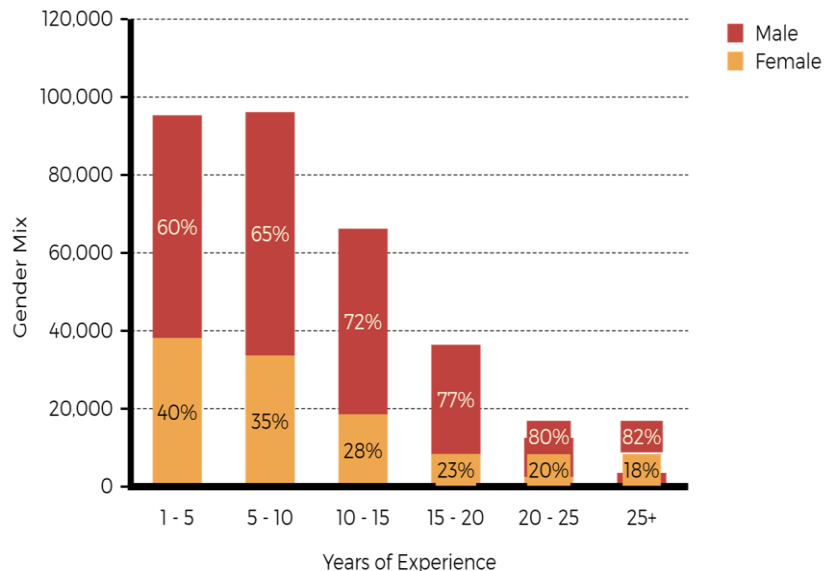
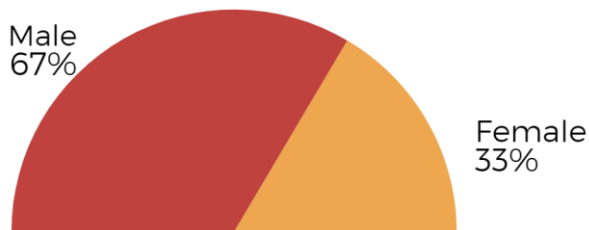
Telangana has an **active and accessible white-collar talent base of 47.80 Lakh**.

Talent pool with **minimum working experience of 1 Year (23.30 Lakh)** makes **49%** of the active white-collar talent pool.

A total of **3.1 Lakh** employees are currently **engaged across GCCs** in Telangana. This talent pool accounts for **13%** of the total active white-collar talent pool with minimum experience.

TELANGANA GCC TALENT SNAPSHOT

GENDER & EXPERIENCE DISTRIBUTION OF ACCESSIBLE GCC TALENT



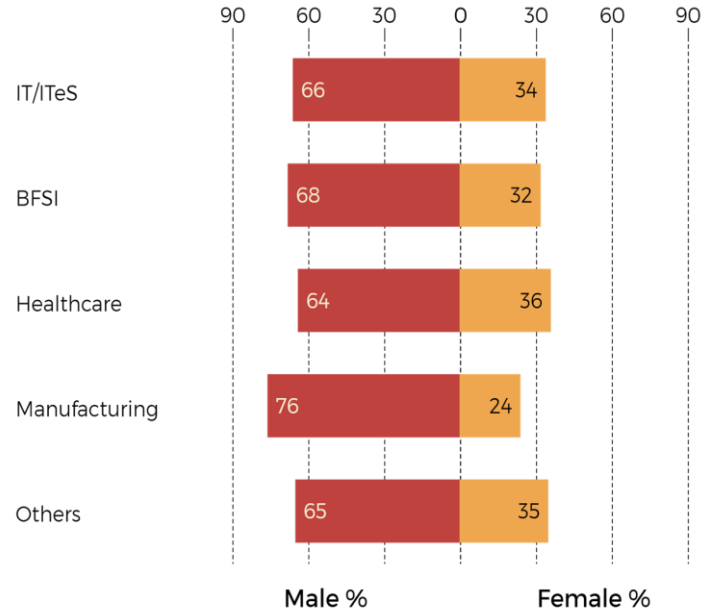
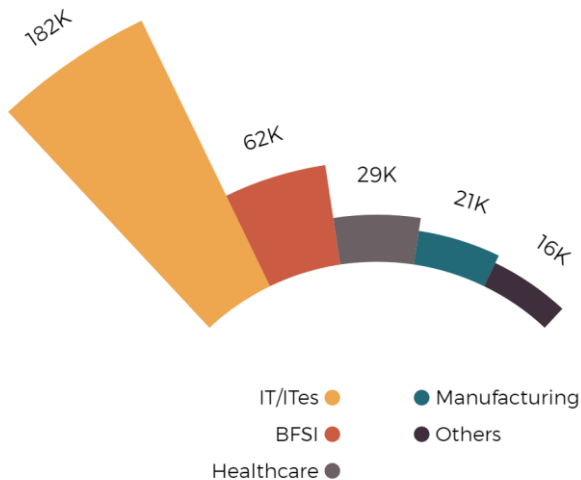
GCC talent in Telangana holds an experience mix that has **95K entry-level talent** and the **mid-experience layer** or **5 to 10 years** account for **96K**, both at **31%** of total GCC talent pool in Telangana.

Mid-senior level talent in the 10 to 20 years of experience range account for **1.02 Lakh (33%)** and **Senior talent** in the 20+ years of experience make **5% of the GCC talent pool in Telangana**.

Women representation in the active GCC talent pool decreases steadily with rise in experience level. Women dropping out of active workforce at higher experience levels is an evident trend.

TELANGANA GCC TALENT

TOP INDUSTRY GROUPS BY ACCESSIBLE GCC TALENT VOLUME

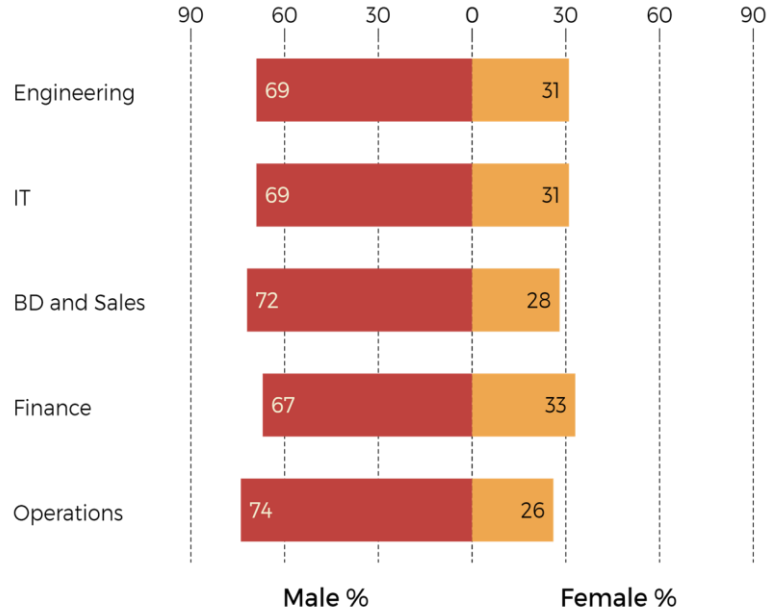
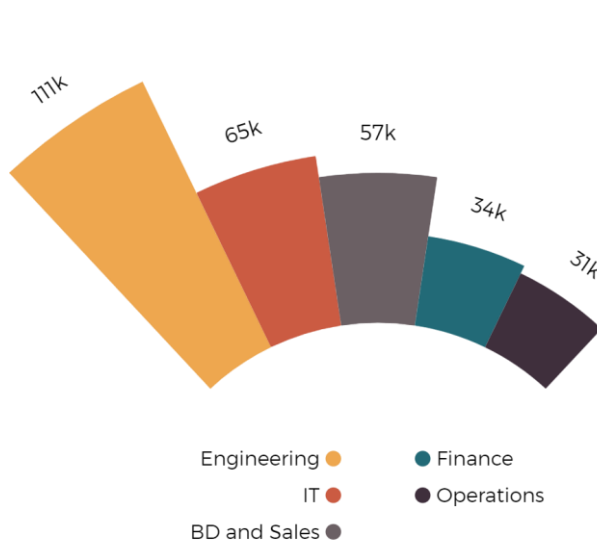


IT/ITeS cohort of Telangana's GCCs is the lead employment sector for active talent. **59% (1.82 Lakh) of the total GCC talent pool of Telangana is engaged by the IT/ITeS Cohort.**

BFSI, Healthcare and Manufacturing cohorts trail behind the IT/ITeS cohort by huge margins on active talent volumes.

TELANGANA GCC TALENT

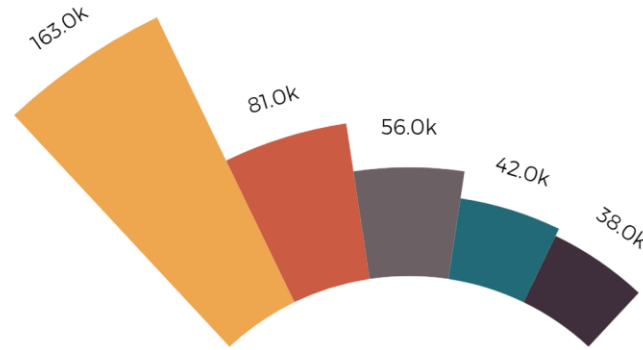
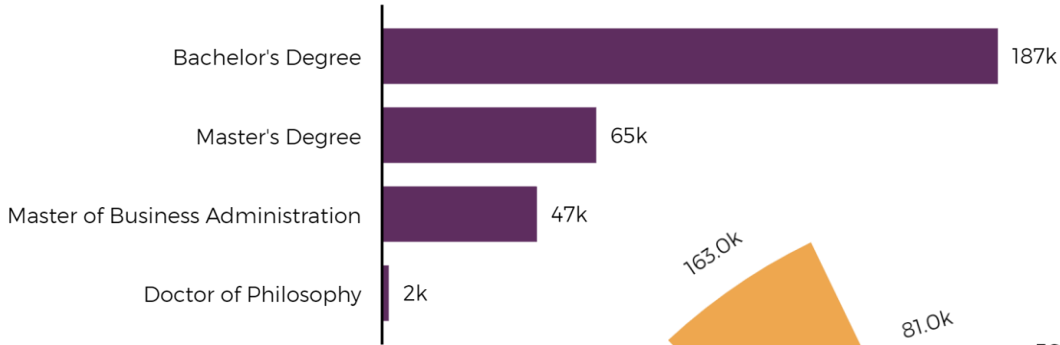
TOP ENTERPRISE FUNCTIONS BY ACCESSIBLE GCC TALENT VOLUME



Top 3 Enterprise Functions collectively account for over **75%** of GCC talent of Telangana. The Engineering & IT functions are on the lead with a collective 1.76 Lakh headcount. As a collective of key enterprise functions, this cohort of Engineering & IT, accounts for 57% of the total GCC talent of Telangana.

TELANGANA GCC TALENT

DISTRIBUTION BY TOP QUALIFICATIONS AND EDUCATION STREAMS

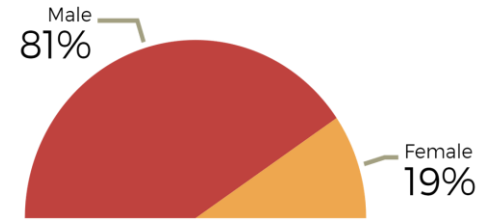
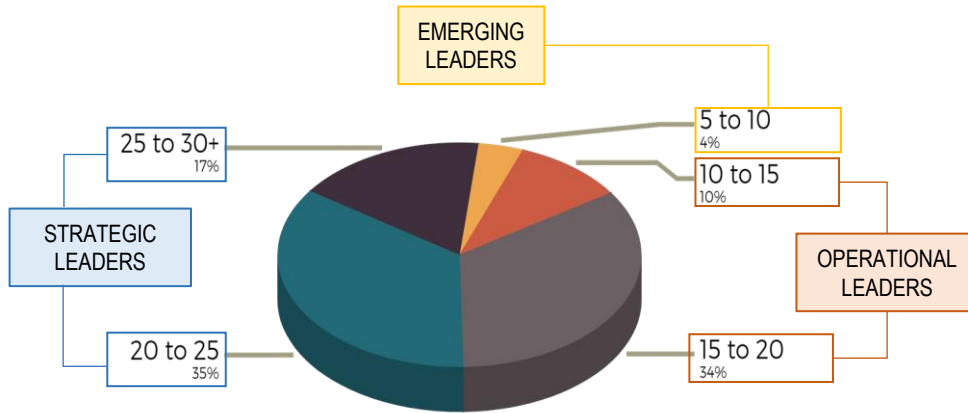


- Computer Science ●
- Other Engineering ●
- Arts and Science ●
- Business and Commerce ●
- Finance and Accounting ●

53% of active experienced GCC talent pool holds **qualifications in Computer Science**. 26% of the talent pool holds other Engineering qualifications. A mix of qualifications across tech and non-tech streams is characteristic of the multi-functional capability that GCCs in Telangana have.

GCC LEADERSHIP TALENT SNAPSHOT - TELANGANA

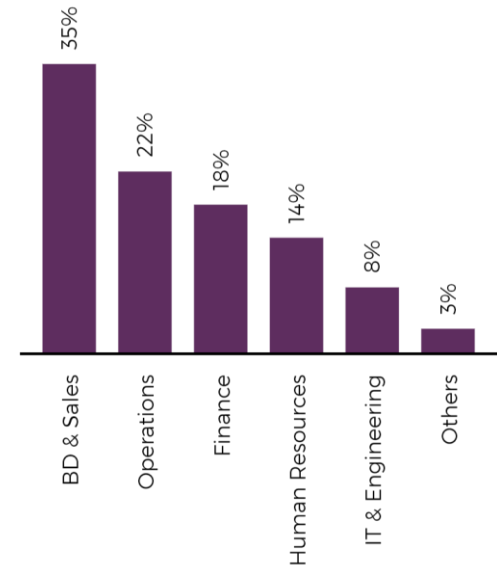
EXPERIENCE, GENDER & FUNCTIONAL DISTRIBUTION OF LEADERSHIP TALENT



* Numbers denote total years of experience

Telangana's GCCs have an **active accessible talent pool of 3500+ senior leaders** across various enterprise functions. 96% of this pool of leaders hold 10+ years of working experience and currently hold operational and strategic leadership roles.

The accessible GCC Leadership Talent pool of Telangana has a **gender mix of 19% Female leaders and 81% Male leaders**. Telangana's GCCs are also investing in a leadership lineup with an additional 1000+ role holders in other senior positions.



SECTION A2

GCCs Talent Landscape






Telangana – Top Employers




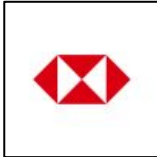







TELANGANA GCCs - TOP EMPLOYERS

TOP EMPLOYER BRANDS BY VOLUME OF GCC TALENT

INFORMATION TECHNOLOGY

		
IBM	MICROSOFT	QUALCOMM
		
SALESFORCE	CARELON GLOBAL SOLUTIONS	EPAM SYSTEMS
		
INFOR	GOOGLE	GLOBALLOGIC

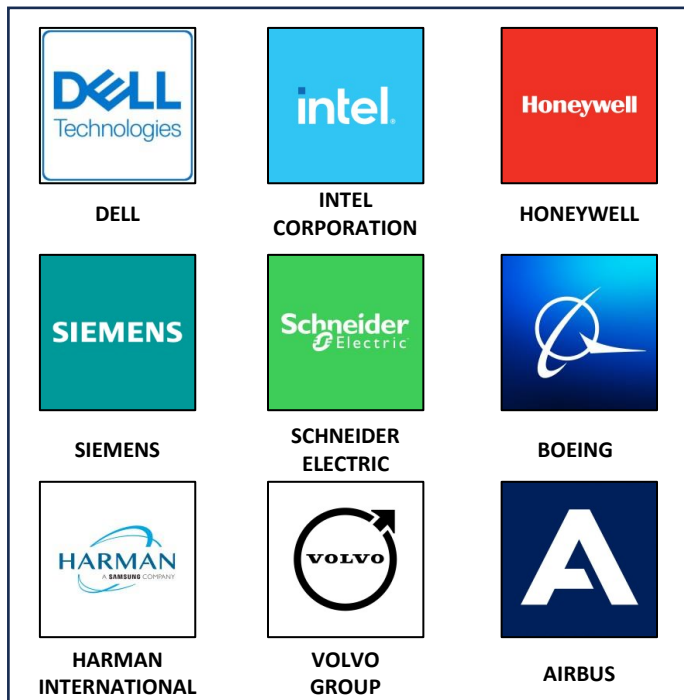
BFSI AND ADVISORY SERVICES

		
WELLS FARGO	HSBC	BANK OF AMERICA
		
S&P GLOBAL	FACTSET	STATE STREET
		
DBS BANK	PWC	BROADRIDGE

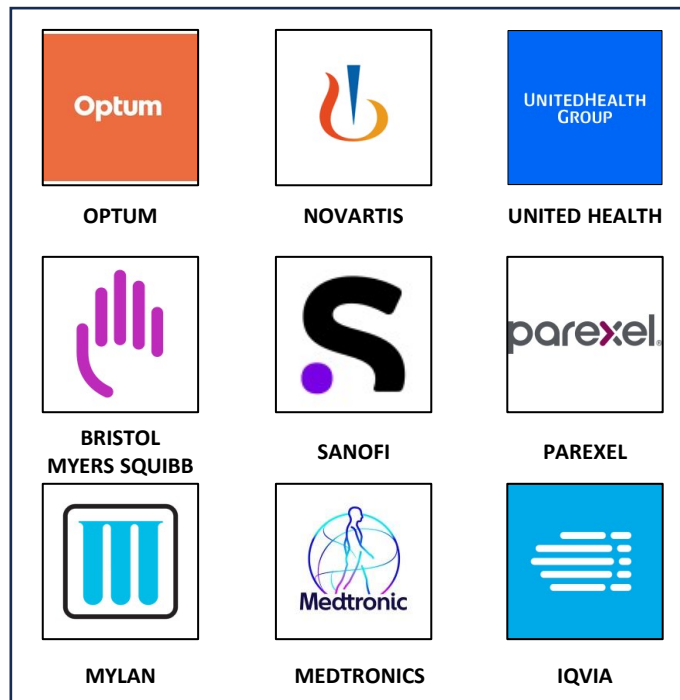
TELANGANA GCCs - TOP EMPLOYERS

TOP EMPLOYER BRANDS BY VOLUME OF GCC TALENT

MANUFACTURING



PHARMA,HEALTHCARE AND MEDICAL EQUIPMENT



SECTION B

Net Talent Balance – India GCCs

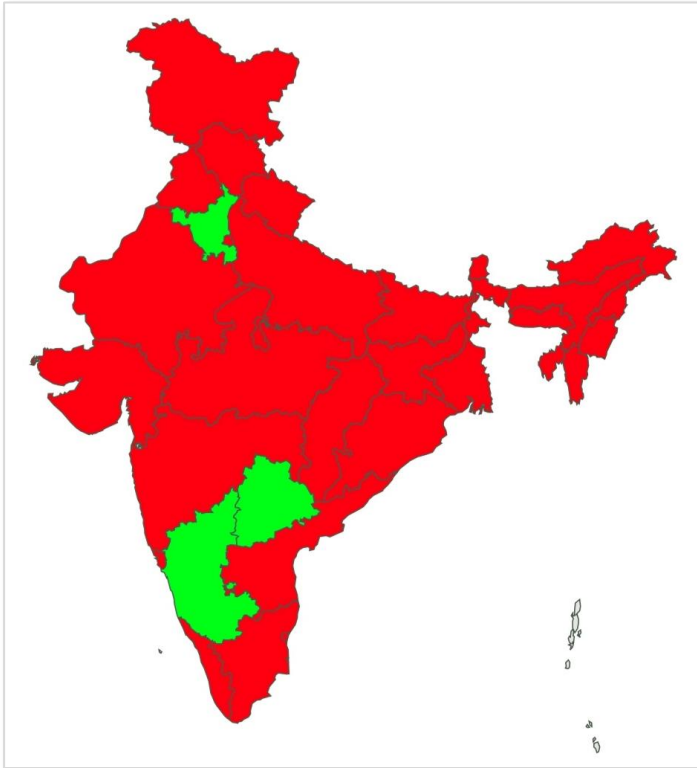
Talent Positive & Talent Negative

TALENT POSITIVE & TALENT NEGATIVE STATUS

TERM	DEFINITION
Talent Corridors	Talent in a geography or industry is dynamic and remains in motion in and out. The lines of talent connection that a City, State or Country has with a geography or industry are called Talent Corridors.
Talent Movement	The shift of talent via a Talent Corridor in search of better prospects or for personal preference is called a Talent Movement.
Talent Exchange	Talent movements can be one-way or two-way in direction. When a geography or industry gains and also loses talent to another geography, in a said period of time, a Talent Exchange occurs.
Net Talent Balance	The delta between the volume of talent absorbed and volume of talent lost is the Net Talent Balance at both ends of the Talent Corridor.
Talent Positive / Positive Talent Balance	A Positive Talent Balance (PTB) occurs when a geography or industry attracts & retains more talent, than what it loses to a competing geography or industry.
Talent Negative / Negative Talent Balance	A Negative Talent Balance (NTB) occurs when a geography or industry loses more talent, than what it attracts from a competing geography or industry.
Factors impacting Net Talent Balance	Talent exchanges are primarily driven by economic factors of opportunity and growth. Social, political, cultural, infrastructure and geological factors also impact.
Desired state	PTB is a highly desirable state that impacts the economic progress of a geography or industry. However, a very high PTB for long cycles is also not healthy as it leads to saturation and can impact desirability. Also, very high and Long-term NTB is not a desirable state for any geography or industry.

NET TALENT BALANCE MAP – INDIA GCCs

NET TALENT BALANCE OF GCCs IN STATES & UNION TERRITORIES



Andhra Pradesh	NTB	Manipur	NTB
Arunachal Pradesh	NTB	Meghalaya	NTB
Assam	NTB	Mizoram	NTB
Bihar	NTB	Nagaland	NTB
Chhattisgarh	NTB	Odisha	NTB
Delhi	NTB	Puducherry	NTB
Goa	NTB	Punjab	NTB
Gujarat	NTB	Rajasthan	NTB
Haryana	PTB	Sikkim	NTB
Himachal	NTB	Tamil Nadu	NTB
Jammu & Kashmir	NTB	Telangana	PTB
Jharkhand	NTB	Tripura	NTB
Karnataka	PTB	Uttar Pradesh	NTB
Kerala	NTB	Uttarakhand	NTB
Madhya Pradesh	NTB	West Bengal	NTB
Maharashtra	NTB	Manipur	NTB

GCCs of 3 states have emerged Talent Positive in this study period. **The 3 states** by PTB value of GCCs are **Karnataka, Telangana and Haryana**.

PTB - Positive Talent Balance | **NTB** – Negative Talent Balance

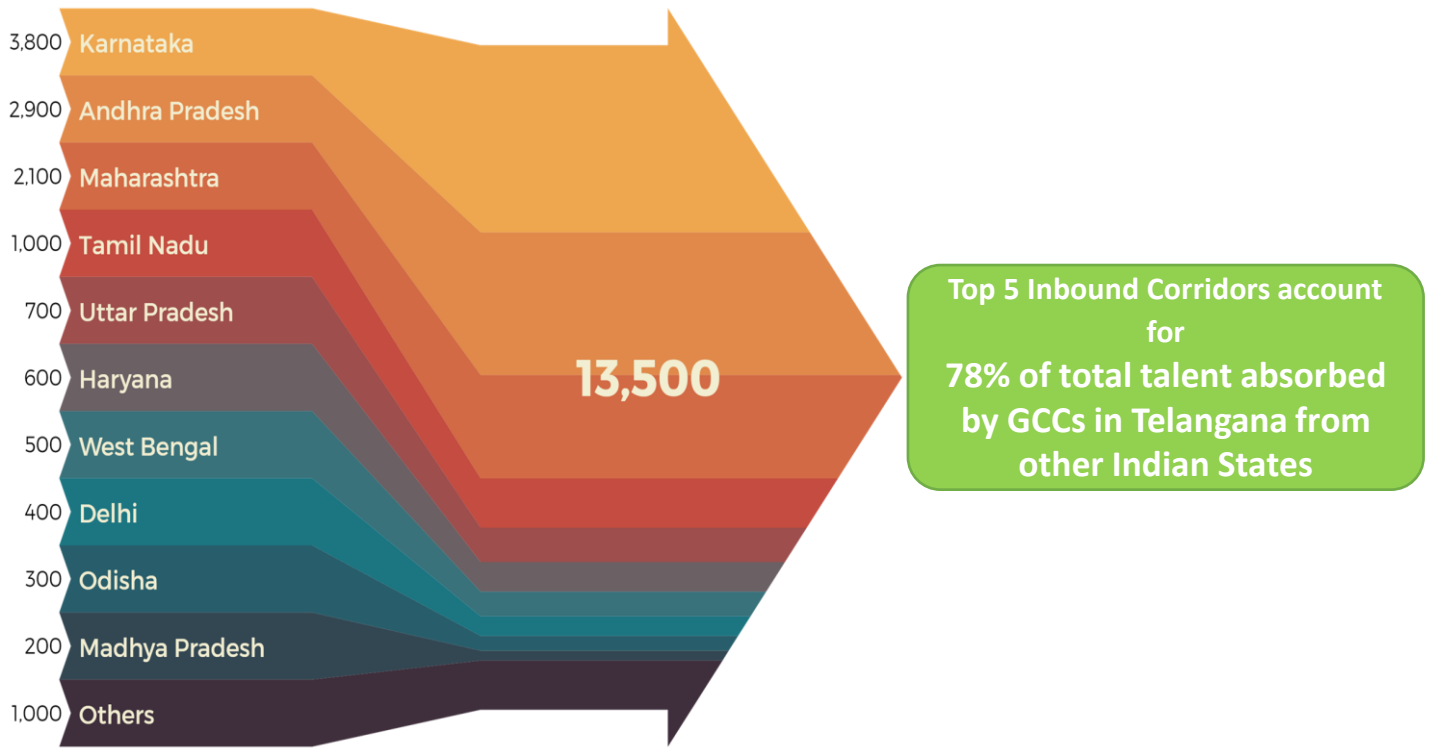
SECTION C

Talent Movement Corridors GCCs – Telangana State



TELANGANA GCC TALENT MOVEMENT CORRIDORS

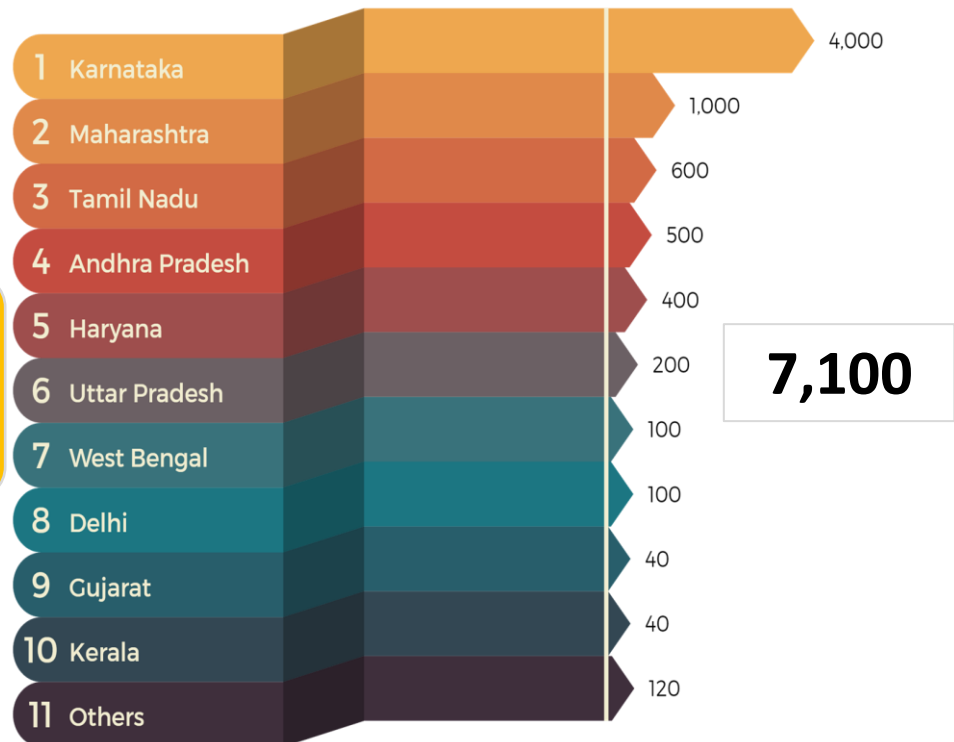
ABSORPTION FROM OTHER INDIAN STATES / UNION TERRITORIES – LAST 12 MONTHS



TELANGANA GCC TALENT MOVEMENT CORRIDORS

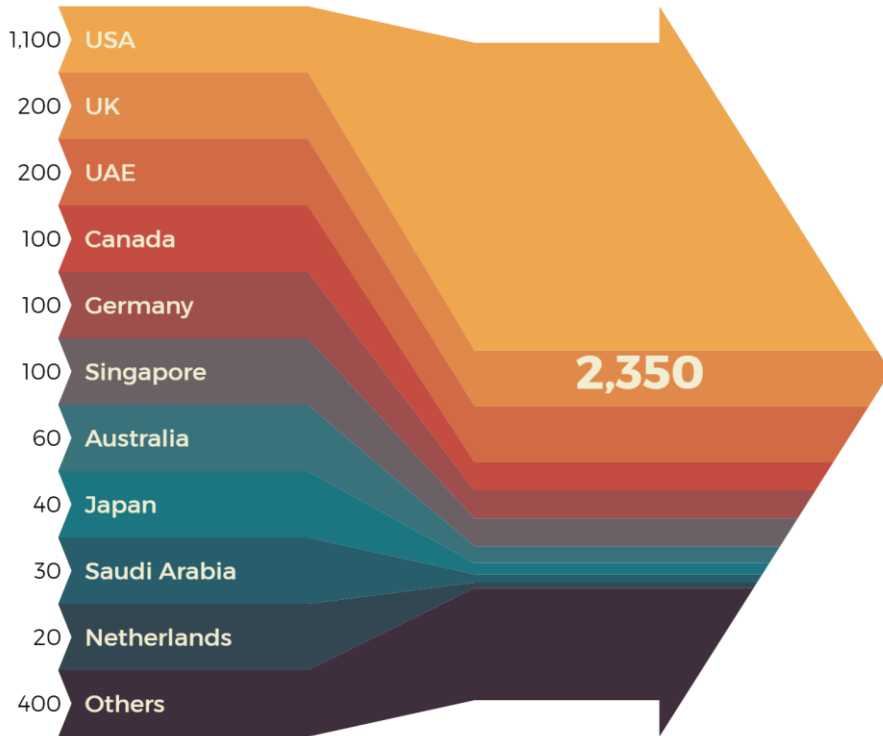
TALENT LOST TO OTHER INDIAN STATES / UNION TERRITORIES – LAST 12 MONTHS

Top 5 Outbound Corridors account For 92% of total talent lost by Telangana GCCs to other Indian States



TELANGANA GCC TALENT MOVEMENT CORRIDORS

ABSORPTION OF OVERSEAS TALENT- LAST 12 MONTHS

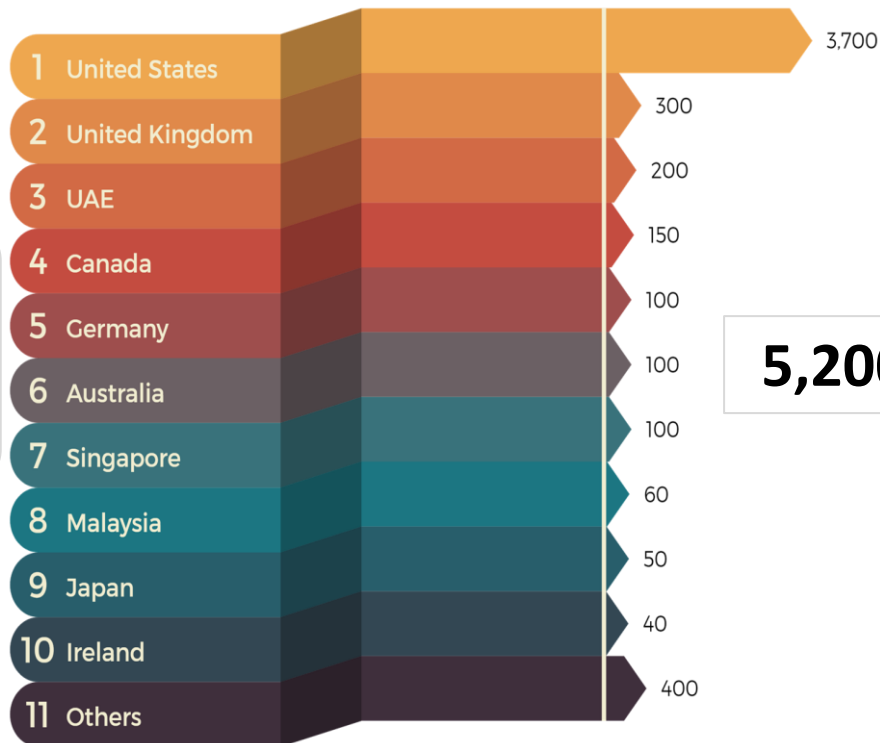


Top 5 Inbound Corridors account for 72% of total overseas talent absorbed by Telangana GCCs

TELANGANA GCC TALENT MOVEMENT CORRIDORS

TALENT LOST TO OTHER COUNTRIES – LAST 12 MONTHS

Top 5 Outbound Corridors account for 86% of total talent lost by Telangana GCCs to other Countries



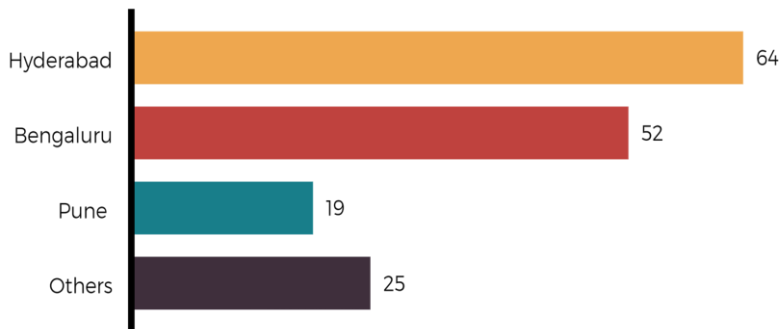
5,200

SECTION D

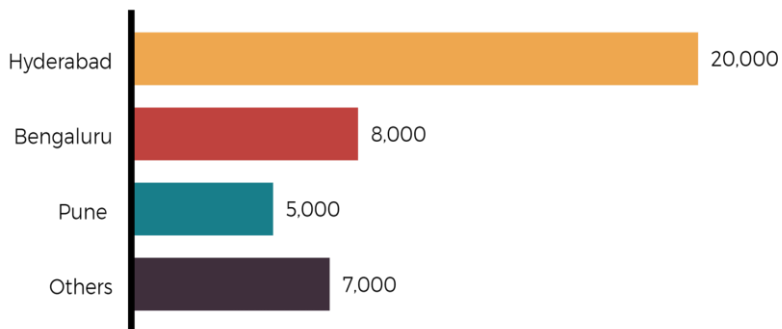
Dipstick on Hyderabad Greenfield GCCs



UNITS AND HEADCOUNT BY LOCATIONS

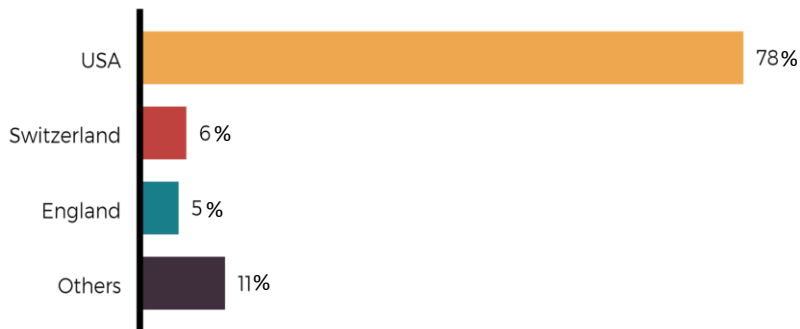


Greenfield Units by Locations



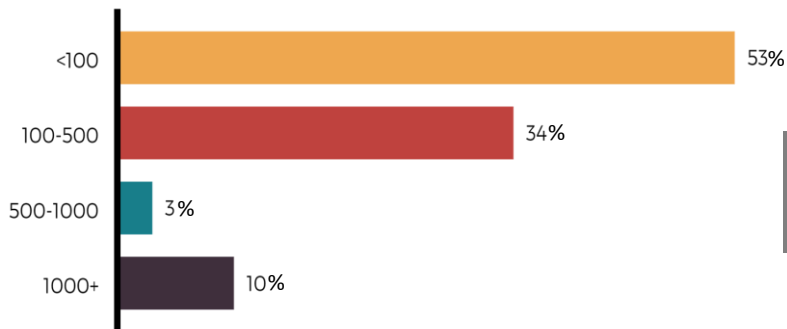
Greenfield Headcount additions by Locations

IN THE LAST 30 MONTHS 160 GREENFIELD GCCs HAVE BEEN SET UP IN INDIA. 40% OF THEM WERE SET UP IN HYDERABAD, MAKING IT THE NEW LOCATION OF CHOICE.



USA REMAINS THE TOP CONTRIBUTOR TO HYDERABAD GREENFIELD GCCs WITH 78% OF THE ENTERPRISES HEADQUARTERED IN US.

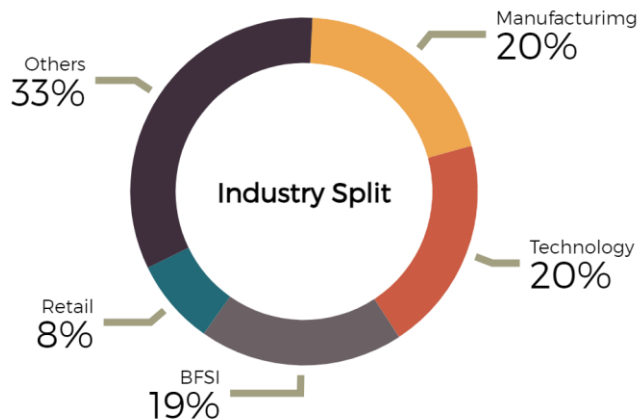
Greenfield GCCs by Headquarters



GREENFIELD GCCs HOLD CAPACITIES VARYING WIDELY FROM 2-DIGIT NANO & MICRO GCC FORMATS AND ALL THE WAY UPTO 4 DIGIT FIGURES.

Greenfield GCCs by Unit Size

INDUSTRY AND ENTERPRISE FUNCTION SPLIT

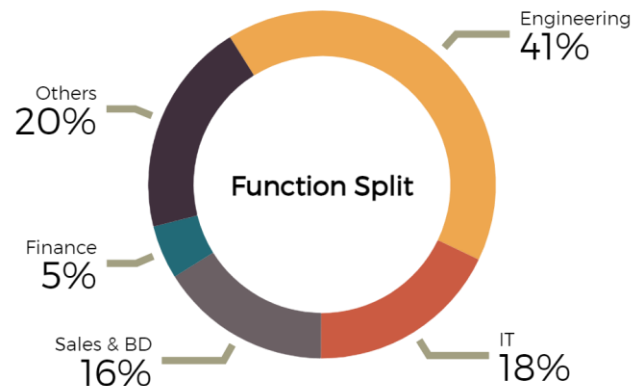


TECH & MANUFACTURING SECTORS DOMINATE, ACCOUNTING FOR 40% OF THE HYDERABAD GREENFIELD LANDINGS IN THE 30 MONTH PERIOD.

Greenfield GCCs by Industry

Greenfield Workforce by Function

ENGINEERING & IT ARE THE LARGEST FUNCTIONS, ACCOUNTING FOR 59% OF THE HYDERABAD GREENFIELDS' ESTABLISHED WORKFORCE.



SECTION E

Talent Desirability

Jobseeker preferences for Telangana

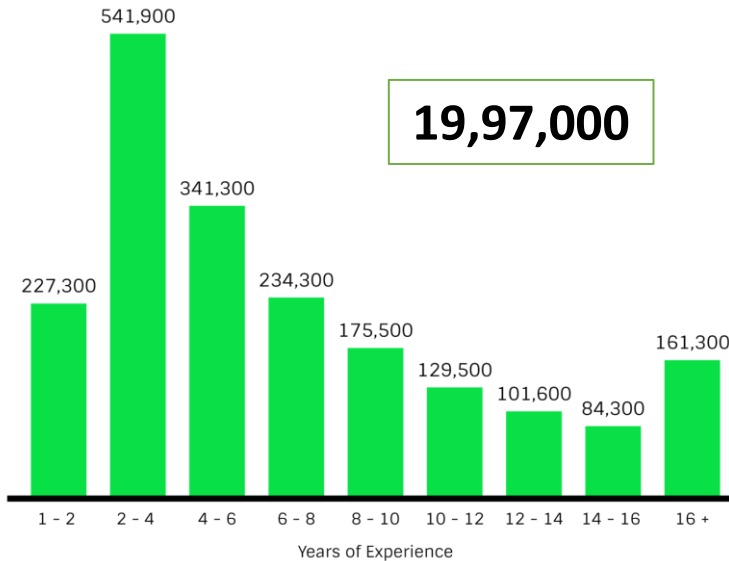


TELANGANA TALENT DESIRABILITY

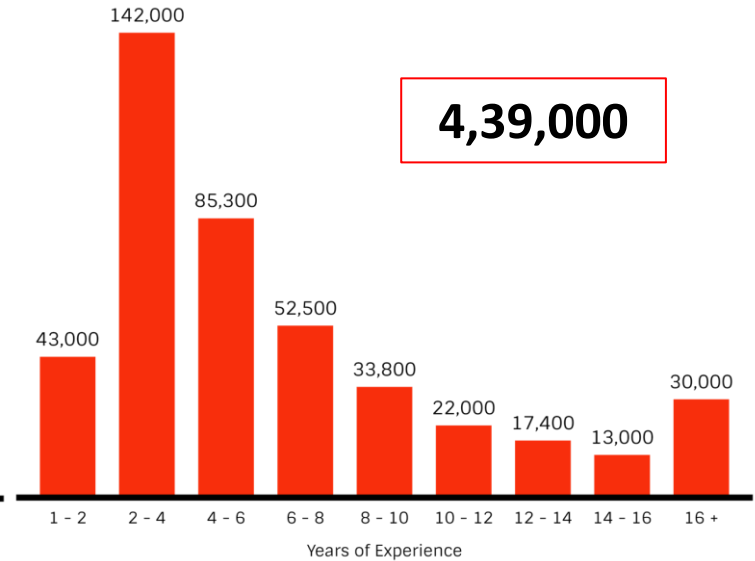
EXPERIENCE WISE ACTIVE JOBSEEKERS



Inbound Jobseekers (From Other States to Telangana)



Outbound Jobseekers (From Telangana to Other States)



Telangana has a strong line up of white-collar talent stating preference to move into the state. The volume of inbound jobseekers is more than 4x the count of outbound jobseekers. This signals desirability for the state & its ability to have a higher retention of talent.

Telangana GCCs

Talent Summary



Telangana GCCs – Key statistics	October 2025
Accessible White-collar workforce (TG)	47.8 Lakh
White-collar talent with minimum work experience (TG)	23.3 Lakh
Telangana GCC white-collar talent	3.1 Lakh
Female : Male ratio in GCC workforce	33 : 67
IT / ITes GCCs Talent pool – #1 of Top 5 Sectors	1.82 Lakh
Non-tech Sector – GCC Talent pool	1.28 Lakh
Engineering & IT Function – GCC Talent pool	1.76 Lakh
Top 3 Non-tech Functions – GCC Talent pool	1.22 Lakh
GCC Talent Pool with Bachelor’s Degree	1.87 Lakh
GCC Talent Pool with Master’s Degree	65 K
GCC Talent Pool with MBA	47 K
GCC Talent absorption from other states – 12 months	13.5 K
GCC Talent lost to other states – 12 months	7.1 K
Net Talent Balance – GCCs Telangana	6.4 K
Talent Balance Status – GCCs Telangana	PTB
Rank among Positive Talent Balance States of India – GCCs	2

Telangana:

The Next-Gen GCC Powerhouse

October 2025

A Workforce Research release by

Xpheno
RESEARCH

Research Head:
Prasadh M S

Research Lead:
Sushmitha Lakshmi

Research Team & Visualisations:
Samritha K, Nikiil Gowtham, Dhanyashree S, Kavya Rao,
Vighnesh S, Akash Pradhan

Disclaimer

The data and information presented in this report has been sourced and curated from sources believed to be reliable. Xpheno disclaims all warranties as to the accuracy, completeness or adequacy of such information. Xpheno shall have no liability for errors, omissions or inadequacies in the information contained herein, or for interpretations thereof. This Report and its content is not intended to be relied upon as the sole basis for any decision impacting business. Readers are advised to use their personal judgment and discretion in using this report and information presented herein.

This is a neutral report independently curated and analysed by Xpheno purely for research purposes. No bias is intended towards any geography, industry sector or enterprise mentioned in the report. This report does not purport to represent the views of the companies mentioned in the report. Any mention of companies in this report are purely for the purpose of presenting publicly sourced information. Usage of their tradename or trademark is for illustration purposes only.

The material in this publication is copyrighted. No part of this report can be reproduced either in print or digital format without written consent from Xpheno. Request for permission to reproduce any part(s) of the report may be sent to the coordinates provided below. Forwarding, copying or using in other publications, without consent from Xpheno, will be considered as infringement of copyrights.

For enquiries related to the report:

Xpheno

Xpheno Private Limited

Xpression ONE, No.76, 3rd Cross Road,
Residency Road, Ashok Nagar, Bengaluru 560025, IN
research@xpheno.com | www.xpheno.com