

SEPTEMBER 2025



# INDIA GCCs

INDIAN TALENT. GLOBAL CAPABILITIES.

**Xpheno**

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## Executive Summary

### Indian Talent. Global Capabilities.

India's journey to becoming the GCC Capital of the World was built on a blend of 3 world-class infrastructure - physical, talent and technology. The unique human capital construct of India offers Talent & Specialist Skillsets at a Scale, Speed and Price, that remains unmatched to date. Holding nearly 50% of all GCCs and playing host to 1/3<sup>rd</sup> of Fortune 500 firms, is an endorsement of India's sustainable supply chain of talent with global capabilities.

Xpheno is India's largest Specialist Staffing company, headquartered in Bengaluru. Founded in 2017 by recruitment industry veterans to staff Greenfield GCCs, Xpheno has recruited over 30,000 niche tech professionals for GCCs and large Indian & Multinational enterprises. We have a strong presence of 325+ FTEs across India's GCC Hotspots, including Bengaluru, NCR, Mumbai, Pune, Chennai, Hyderabad and Udupi.

This talent landscape report focusses on the breadth and depth of talent available and accessible for all India-bound enterprises. The report offers a preview of what to expect, from a talent POV, when assessing India for a GCC setup. Happy to offer this sneak peek of India's talent and invite you to experience the potential it can unlock.

**Kamal Karanth**  
Co-founder, Xpheno

**Xpheno's proprietary Skill\_Speed\_Scale\_Price framework for Talent Solutions**, has played a vital role in the success of over 40+ Greenfield GCCs set up in India over the last 2 years.

Talent solutions for Greenfield GCCs:

- **CXO & Leadership Hiring** – C-Suite placements and all Functional & Departmental Leadership roles
- **Specialist Talent Hiring** – Junior, Mid, Mid-Senior and Senior-level placements in IT and Non-IT Functions, Project Hiring, Turnkey Recruitment & Recruitment Process Outsourcing solutions
- **Specialist Staffing** – IT, Engineering, R & D and Non-Tech Specialists on Fixed-term Contract and C2H modes

# INDIA GCCs

## Indian Talent. Global Capabilities

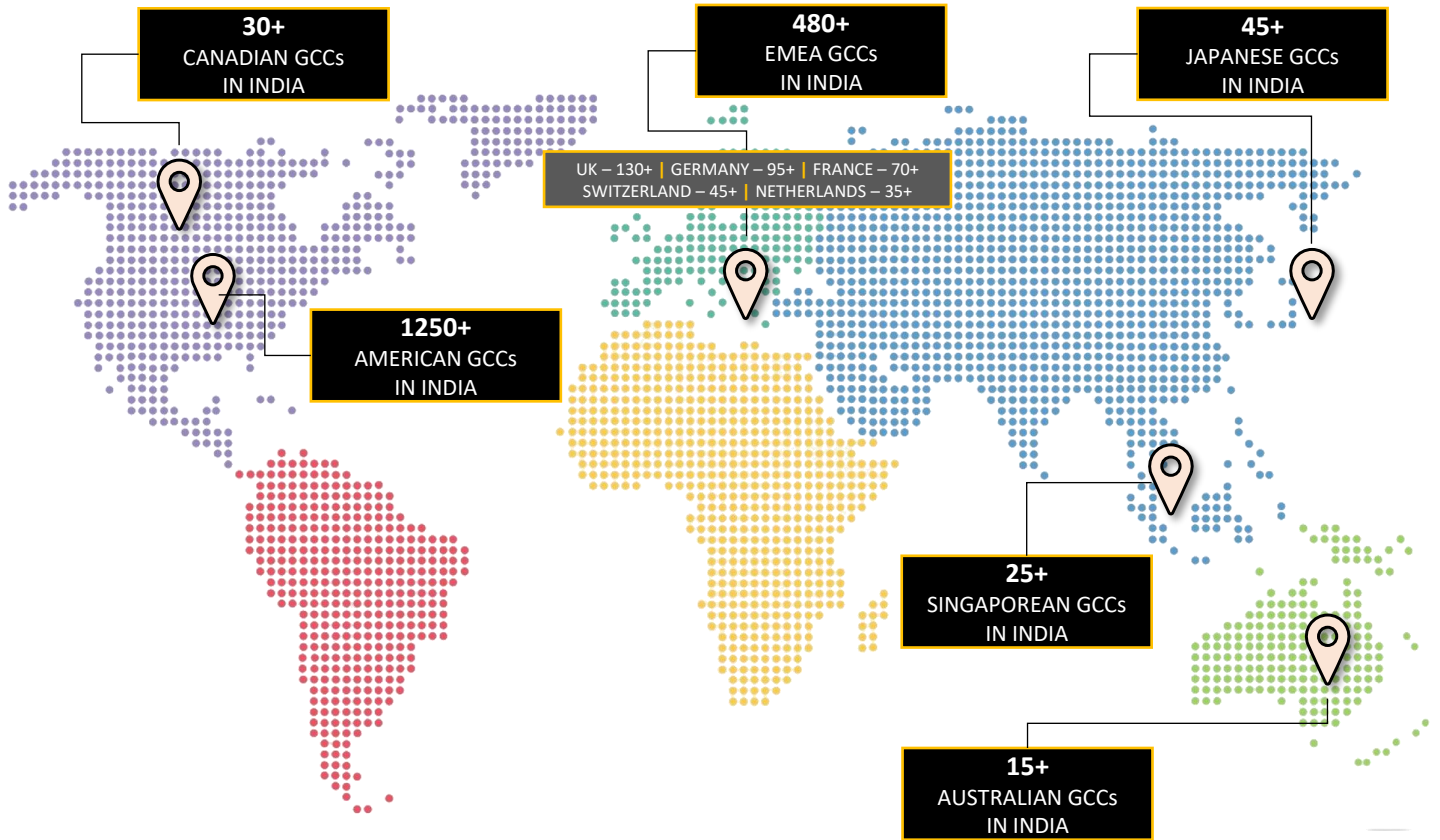
**FORTUNE 500** **35%**  
of Fortune500 Firms  
have setup GCCs in India

**Forbes 2024**  
**GLOBAL 2000** **23%**  
of Forbes Global 2000  
have GCCs in India



**45+ Global Unicorns**  
have GCCs in India

Americas – 35 | EMEA – 10 | APAC – 5



# India GCCs - Hotspots

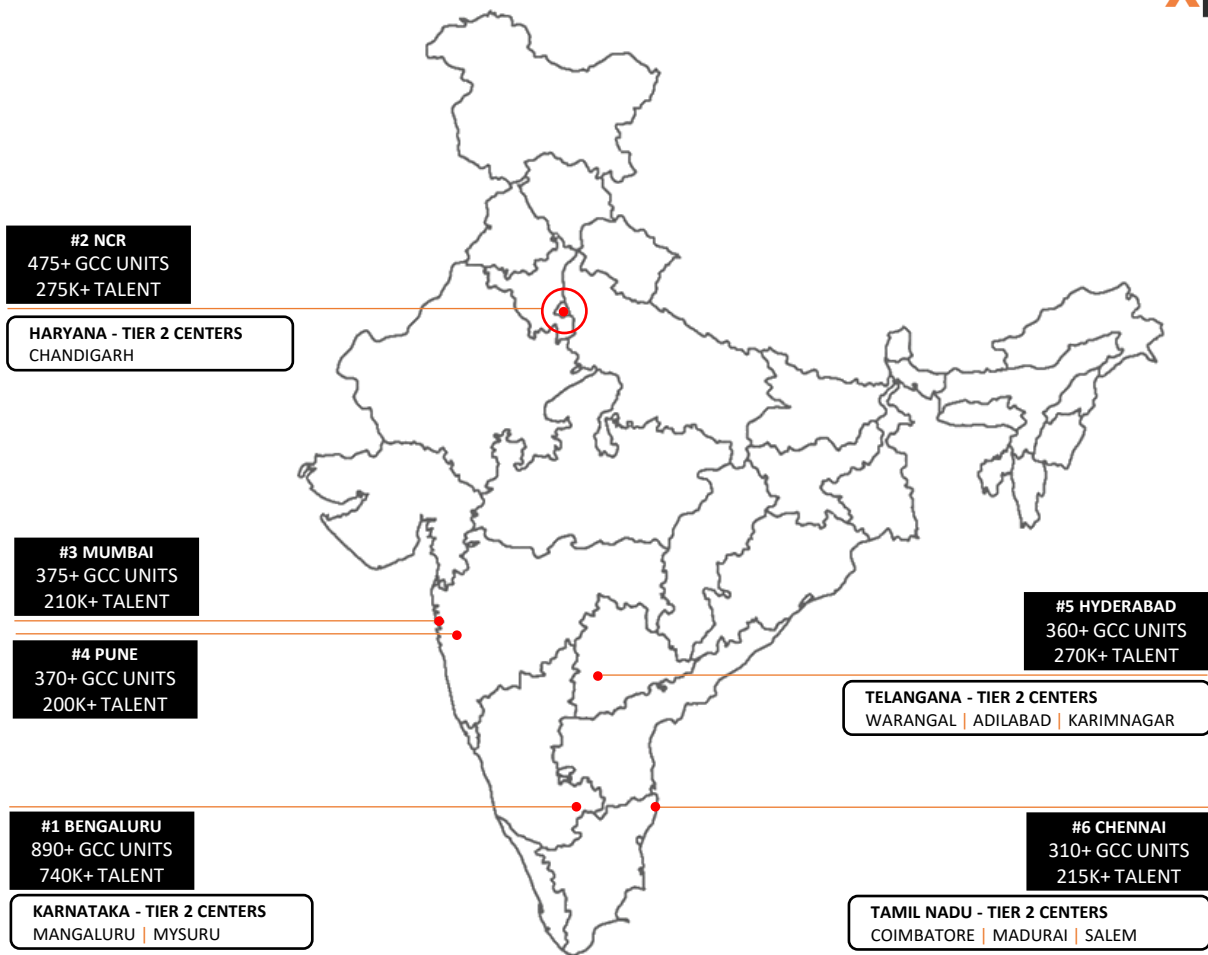
## NUMBERS TO REMEMBER...

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

EMPLOYS NEARLY **1.9 Mn** 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



# Talent Landscape of GCC Hotspots

## KARNATAKA

- Bengaluru

## HARYANA

- Delhi NCR

## MAHARASHTRA

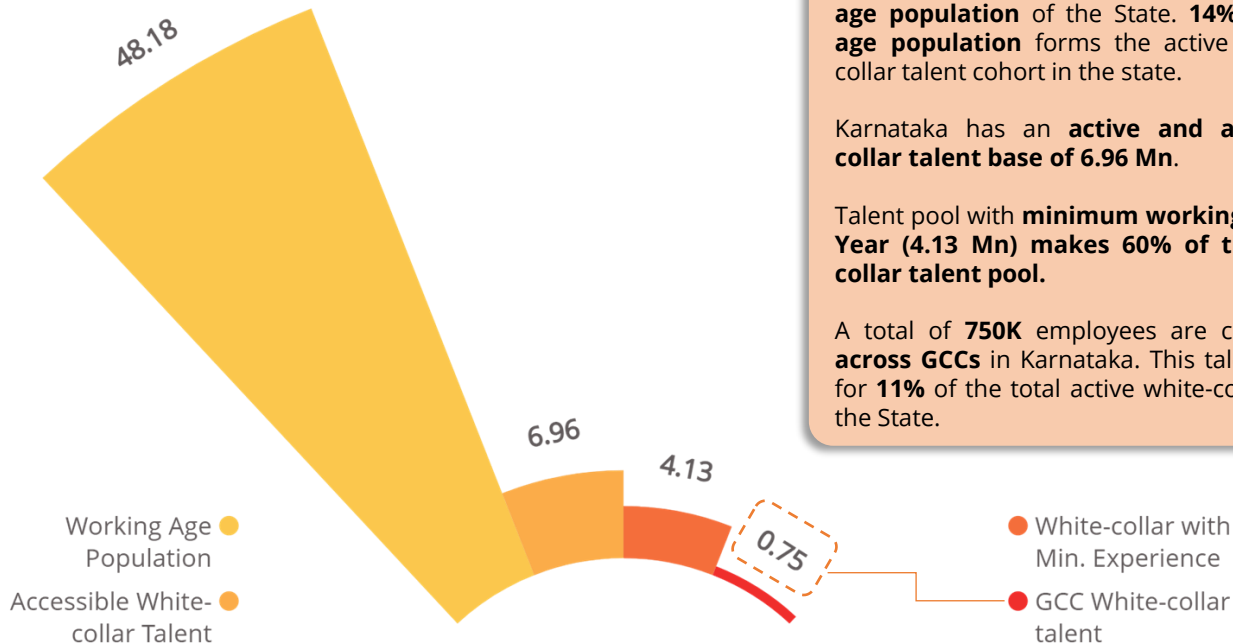
- Mumbai
- Pune

## TELANGANA

- Hyderabad

## TAMIL NADU

- Chennai



\* Numbers in Million

**68%** of Karnataka's population qualifies as **working age population** of the State. **14% of the working age population** forms the active accessible white-collar talent cohort in the state.

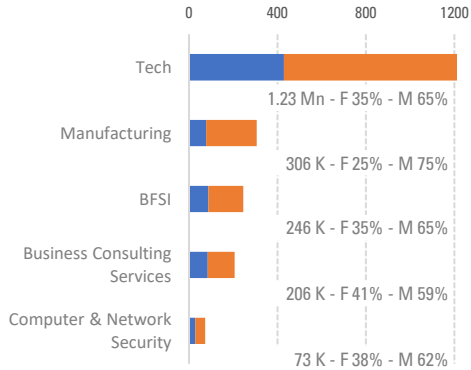
Karnataka has an **active and accessible white-collar talent base of 6.96 Mn.**

Talent pool with **minimum working experience of 1 Year (4.13 Mn)** makes **60% of the active white-collar talent pool.**

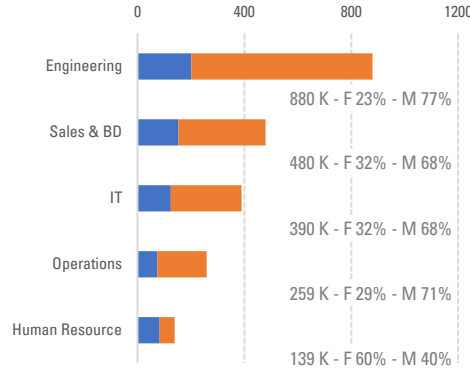
A total of **750K** employees are currently **engaged across GCCs** in Karnataka. This talent pool accounts for **11%** of the total active white-collar talent pool of the State.

## ACTIVE EST. WHITE-COLLAR TALENT POOL – 3.76 Mn | FEMALE – 36% MALE – 64%

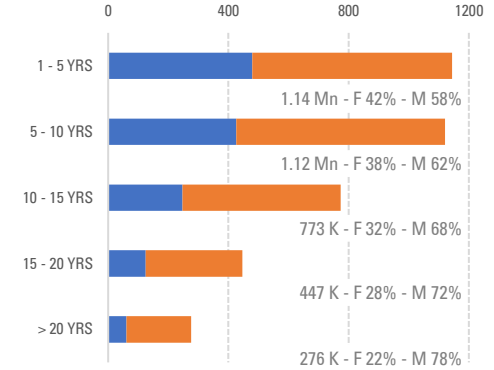
### TOP INDUSTRIES BY TALENT (in 000s)



### TOP FUNCTIONS BY TALENT (in 000s)



### TALENT BY EXPERIENCE (in 000s)



### LEADERSHIP TALENT LANDSCAPE

#### EMERGING LEADERSHIP

(UPTO 10 YEARS EXPERIENCE)

27 K | F 27% | M 73%

#### OPERATIONAL LEADERSHIP

(10 – 20 YEARS EXPERIENCE)

53 K | F 25% | M 75%

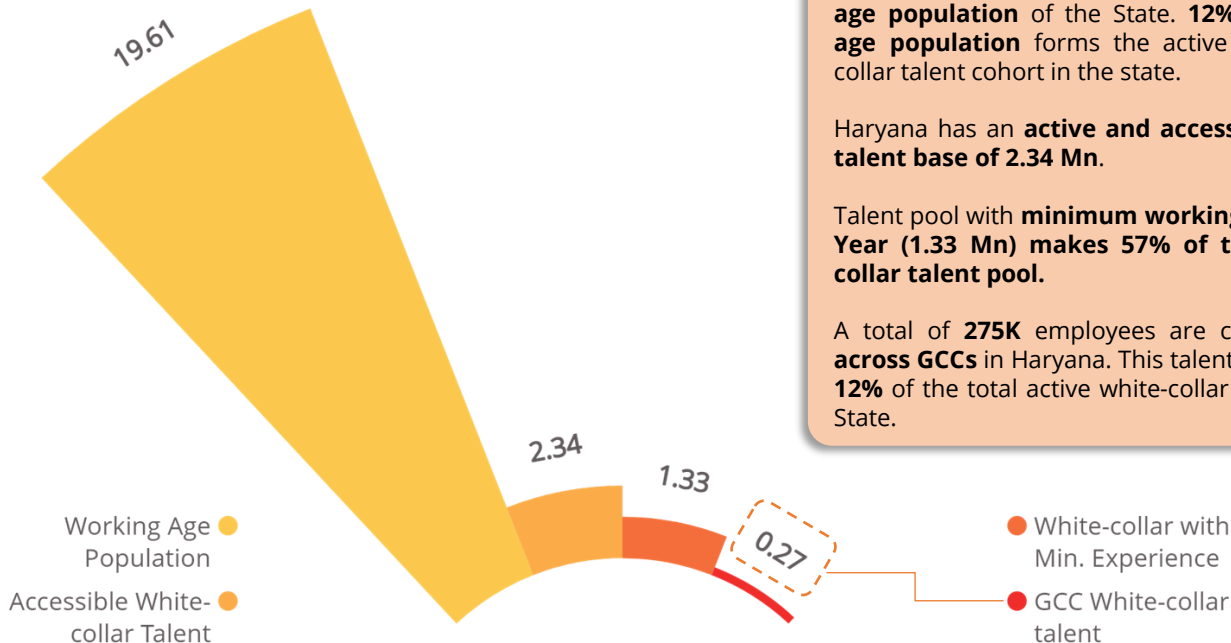
#### STRATEGIC LEADERSHIP

(ABOVE 20 YEARS EXPERIENCE)

31 K | F 19% | M 81%

### TOP EMPLOYERS





\* Numbers in Million

**64%** of Haryana's population qualifies as **working age population** of the State. **12% of the working age population** forms the active accessible white-collar talent cohort in the state.

Haryana has an **active and accessible white-collar talent base of 2.34 Mn.**

Talent pool with **minimum working experience of 1 Year (1.33 Mn)** makes **57% of the active white-collar talent pool.**

A total of **275K** employees are currently **engaged across GCCs** in Haryana. This talent pool accounts for **12%** of the total active white-collar talent pool of the State.

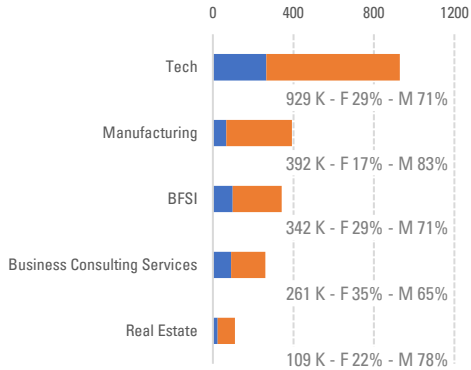
# DELHI NATIONAL CAPITAL REGION

FROM POLITICAL HUB TO NORTHERN INDIA'S GCC STRONGHOLD

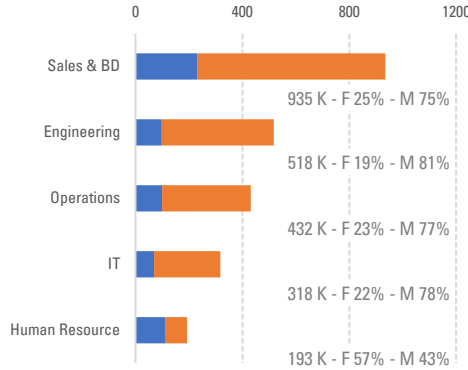


**ACTIVE EST. WHITE-COLLAR TALENT POOL – 4.73 Mn | FEMALE – 30% MALE – 70%**

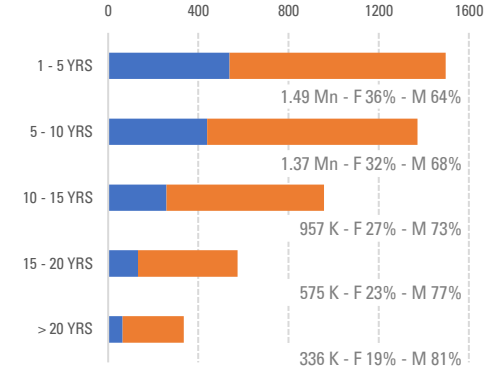
## TOP INDUSTRIES BY TALENT (in 000s)



## TOP FUNCTIONS BY TALENT (in 000s)



## TALENT BY EXPERIENCE (in 000s)



## LEADERSHIP TALENT LANDSCAPE

### EMERGING LEADERSHIP

(UPTO 10 YEARS EXPERIENCE)

64 K | F 25% | M 75%

### OPERATIONAL LEADERSHIP

(10 – 20 YEARS EXPERIENCE)

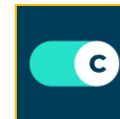
103 K | F 20% | M 80%

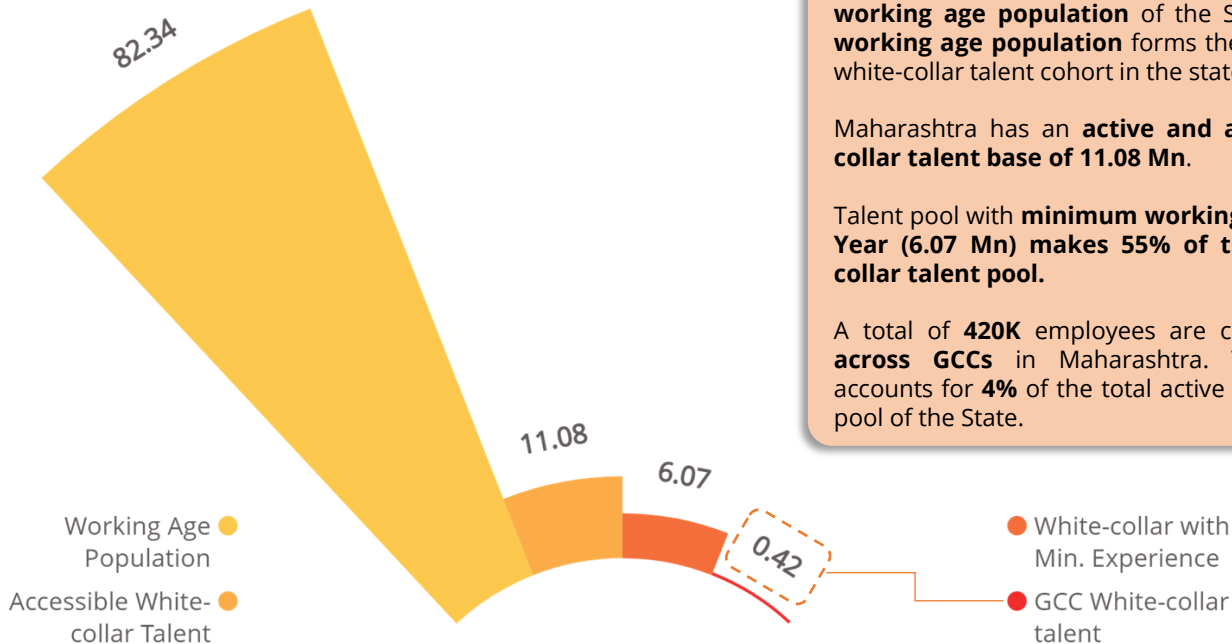
### STRATEGIC LEADERSHIP

(ABOVE 20 YEARS EXPERIENCE)

51 K | F 16% | M 84%

## TOP EMPLOYERS





\* Numbers in Million

**64%** of Maharashtra's population qualifies as **working age population** of the State. **13% of the working age population** forms the active accessible white-collar talent cohort in the state.

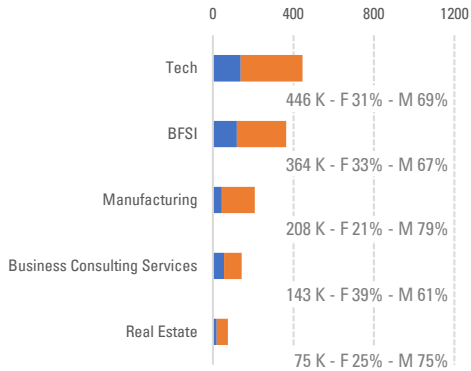
Maharashtra has an **active and accessible white-collar talent base of 11.08 Mn.**

Talent pool with **minimum working experience of 1 Year (6.07 Mn)** makes **55% of the active white-collar talent pool.**

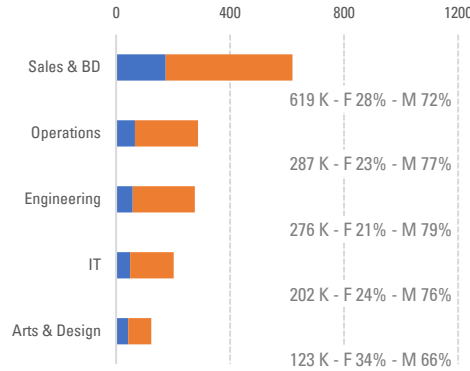
A total of **420K** employees are currently **engaged across GCCs** in Maharashtra. This talent pool accounts for **4%** of the total active white-collar talent pool of the State.

### ACTIVE EST. WHITE-COLLAR TALENT POOL – 3.09 Mn | FEMALE – 33% MALE – 67%

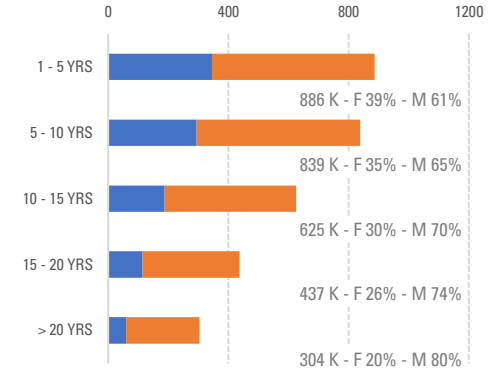
#### TOP INDUSTRIES BY TALENT (in 000s)



#### TOP FUNCTIONS BY TALENT (in 000s)



#### TALENT BY EXPERIENCE (in 000s)



#### LEADERSHIP TALENT LANDSCAPE

##### EMERGING LEADERSHIP

(UPTO 10 YEARS EXPERIENCE)

37 K | F 26% | M 74%

##### OPERATIONAL LEADERSHIP

(10 – 20 YEARS EXPERIENCE)

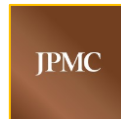
81 K | F 23% | M 77%

##### STRATEGIC LEADERSHIP

(ABOVE 20 YEARS EXPERIENCE)

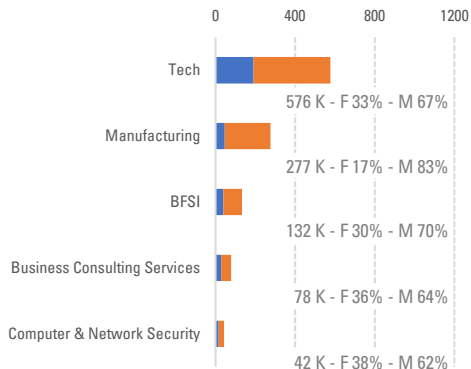
48 K | F 16% | M 84%

#### TOP EMPLOYERS

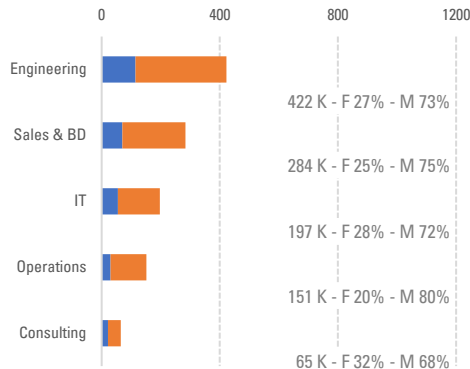


### ACTIVE EST. WHITE-COLLAR TALENT POOL – 1.99 Mn | FEMALE – 31% MALE – 69%

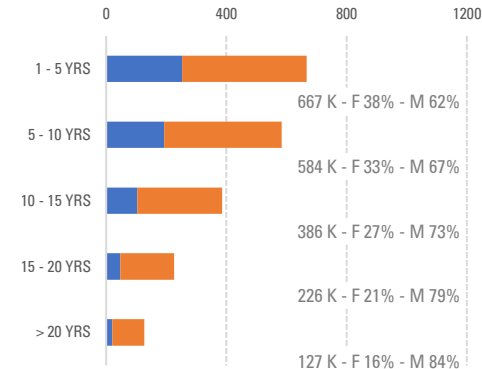
#### TOP INDUSTRIES BY TALENT (in 000s)



#### TOP FUNCTIONS BY TALENT (in 000s)



#### TALENT BY EXPERIENCE (in 000s)



#### LEADERSHIP TALENT LANDSCAPE

##### EMERGING LEADERSHIP

(UPTO 10 YEARS EXPERIENCE)

18 K | F 22% | M 78%

##### OPERATIONAL LEADERSHIP

(10 – 20 YEARS EXPERIENCE)

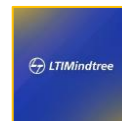
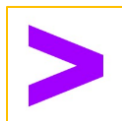
35 K | F 20% | M 80%

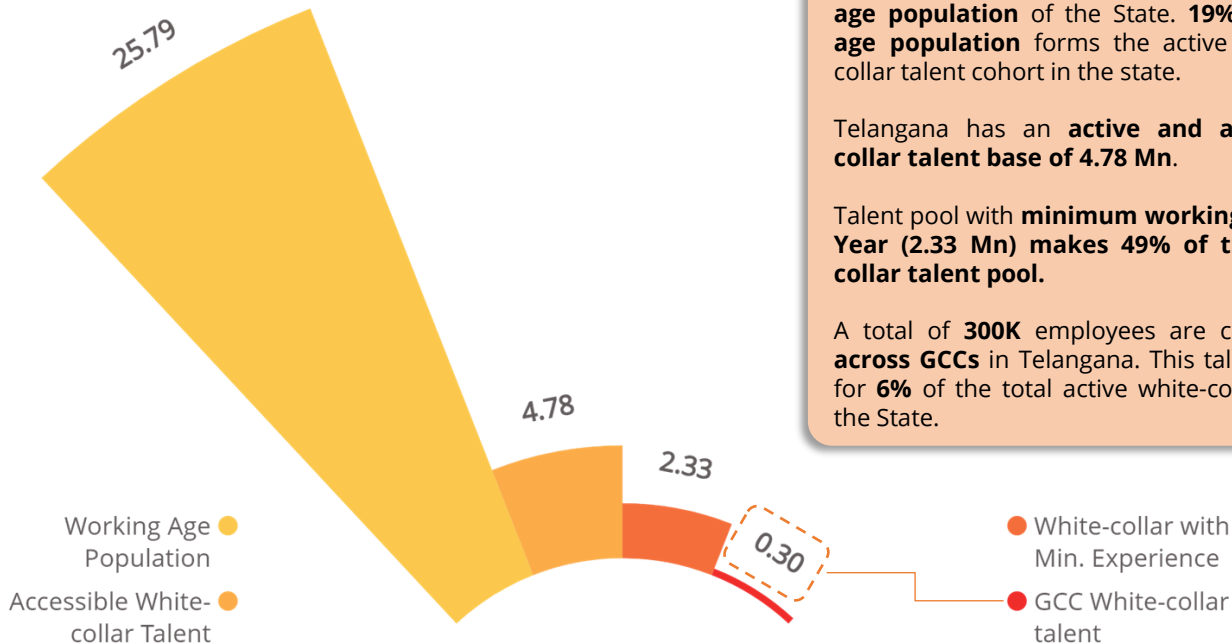
##### STRATEGIC LEADERSHIP

(ABOVE 20 YEARS EXPERIENCE)

15 K | F 14% | M 86%

#### TOP EMPLOYERS





\* Numbers in Million

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

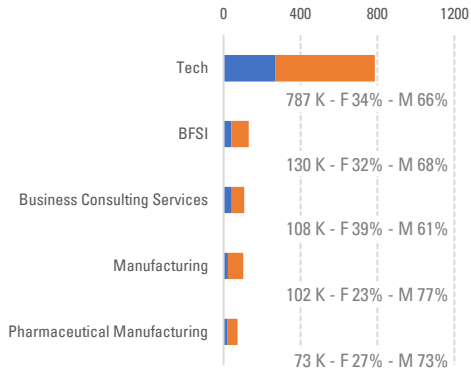
Telangana has an **active and accessible white-collar talent base of 4.78 Mn.**

Talent pool with **minimum working experience of 1 Year (2.33 Mn)** makes **49% of the active white-collar talent pool.**

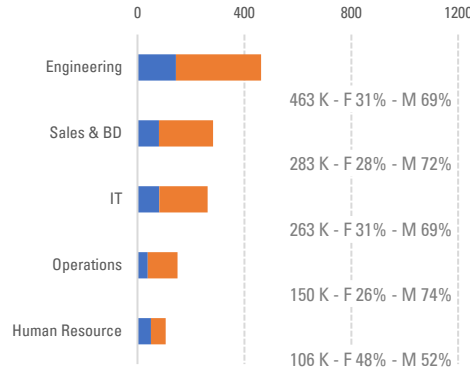
A total of **300K** employees are currently **engaged across GCCs** in Telangana. This talent pool accounts for **6%** of the total active white-collar talent pool of the State.

## ACTIVE EST. WHITE-COLLAR TALENT POOL – 2.23 Mn | FEMALE – 33% MALE – 67%

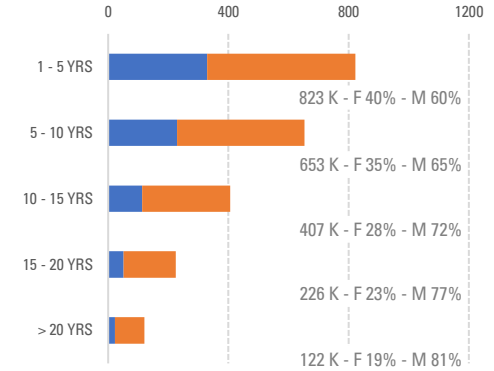
### TOP INDUSTRIES BY TALENT (in 000s)



### TOP FUNCTIONS BY TALENT (in 000s)



### TALENT BY EXPERIENCE (in 000s)



### LEADERSHIP TALENT LANDSCAPE

#### EMERGING LEADERSHIP

(UPTO 10 YEARS EXPERIENCE)

17 K | F 27% | M 73%

#### OPERATIONAL LEADERSHIP

(10 – 20 YEARS EXPERIENCE)

28 K | F 21% | M 79%

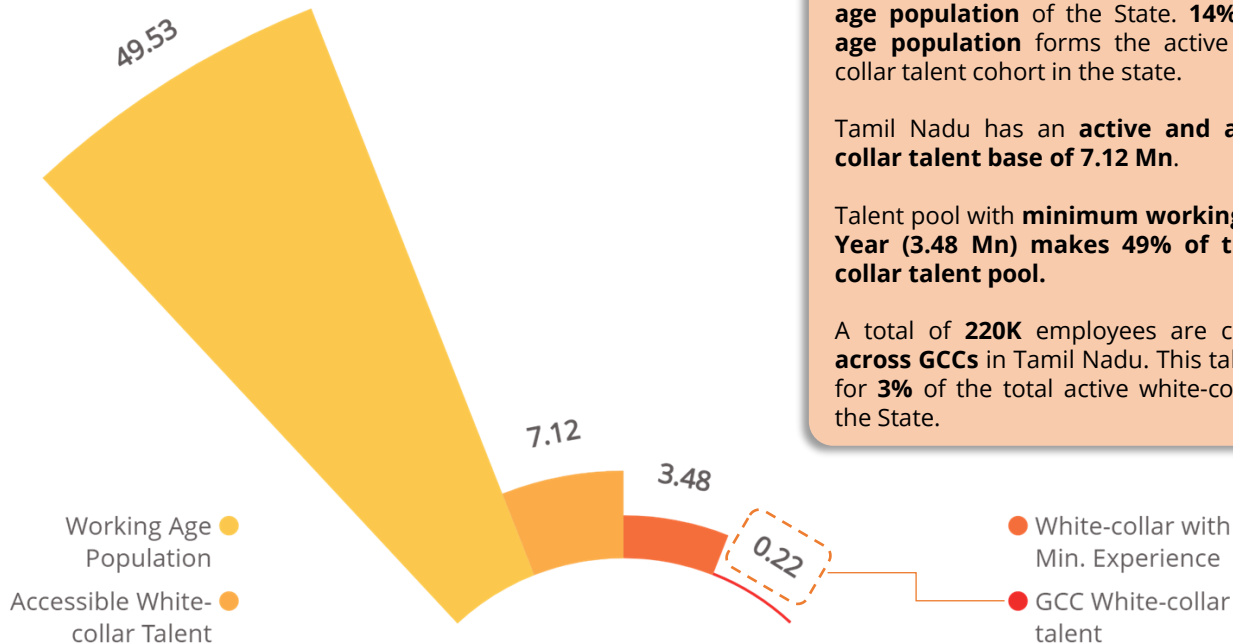
#### STRATEGIC LEADERSHIP

(ABOVE 20 YEARS EXPERIENCE)

14 K | F 16% | M 84%

### TOP EMPLOYERS





\* Numbers in Million

**64%** of Tamil Nadu's population qualifies as **working age population** of the State. **14% of the working age population** forms the active accessible white-collar talent cohort in the state.

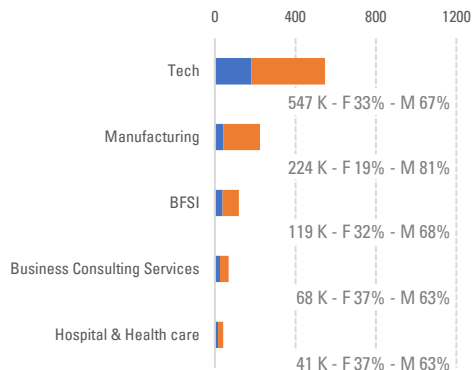
Tamil Nadu has an **active and accessible white-collar talent base of 7.12 Mn.**

Talent pool with **minimum working experience of 1 Year (3.48 Mn)** makes **49%** of the active white-collar talent pool.

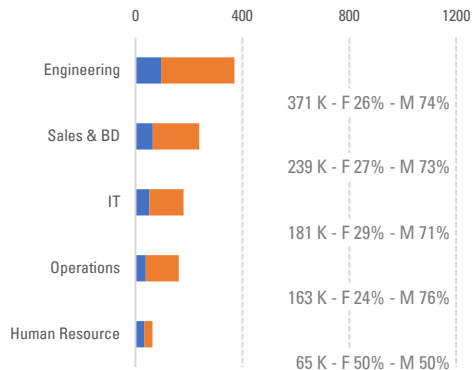
A total of **220K** employees are currently **engaged across GCCs** in Tamil Nadu. This talent pool accounts for **3%** of the total active white-collar talent pool of the State.

## ACTIVE EST. WHITE-COLLAR TALENT POOL – 1.84 Mn | FEMALE – 31% MALE – 69%

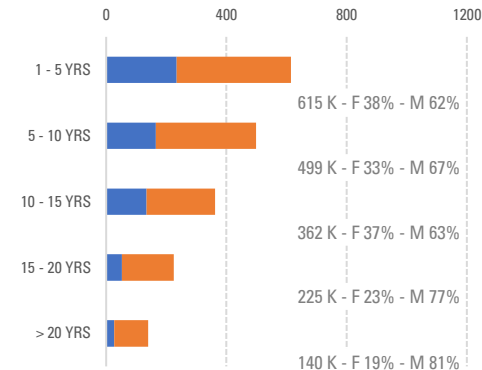
### TOP INDUSTRIES BY TALENT (in 000s)



### TOP FUNCTIONS BY TALENT (in 000s)



### TALENT BY EXPERIENCE (in 000s)



### LEADERSHIP TALENT LANDSCAPE

#### EMERGING LEADERSHIP

(UPTO 10 YEARS EXPERIENCE)

14 K | F 25% | M 75%

#### OPERATIONAL LEADERSHIP

(10 – 20 YEARS EXPERIENCE)

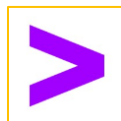
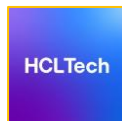
26 K | F 21% | M 79%

#### STRATEGIC LEADERSHIP

(ABOVE 20 YEARS EXPERIENCE)

16 K | F 17% | M 83%

### TOP EMPLOYERS



# Dipstick on Greenfield GCCs

HEADQUARTERS SPLIT

UNIT SIZE

INDUSTRY AND FUNCTION SPLIT

UNITS AND HEADCOUNT

## Inside India's Greenfield GCC Boom What the last 30 months reveal?

### HIGHLIGHTS OF A DIPSTICK STUDY...

MORE THAN 160 GREENFIELD GCCs HAVE BEEN SET UP ACROSS VARIOUS CITIES IN INDIA IN THE LAST 30 MONTHS.

USA REMAINS THE TOP CONTRIBUTOR TO GREENFIELD GCCs WITH 73% OF THE ENTERPRISES HEADQUARTERED IN US.

HYDERABAD EMERGED AS THE TOP CHOICE FOR GREENFIELD SETUPS, ATTRACTING 45% OF THE GREENFIELDS.

THESE GREENFIELDS CURRENTLY HOLD AN ESTABLISHED WORKFORCE CAPACITY OF OVER 140K ACROSS INDIA.

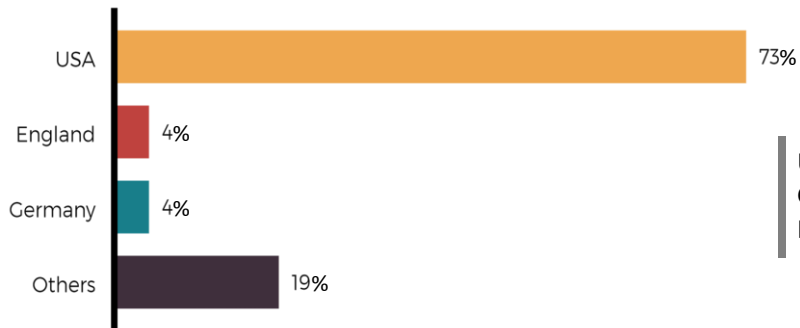
TECH & MANUFACTURING SECTORS DOMINATE, ACCOUNTING FOR 51% OF THE GREENFIELD LANDINGS IN THIS PERIOD.

ENGINEERING & IT ARE THE LARGEST FUNCTIONS, ACCOUNTING FOR 49% OF THE GREENFIELDS' WORKFORCE.

A COLLECTIVE OF 800+ TALENT ACQUISITION PROFESSIONALS & HIRING PARTNERS HANDLE BACKFILLS & EXPANSION HIRING

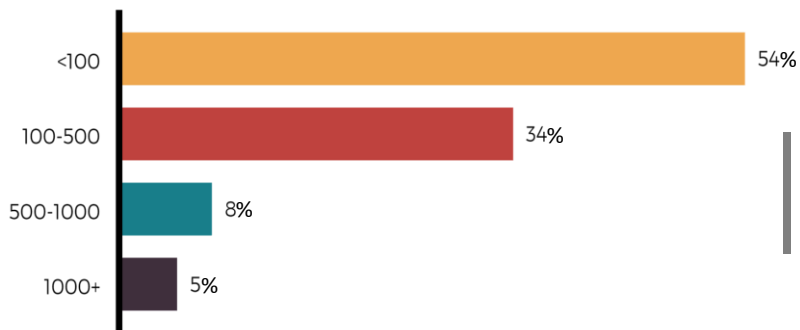
# GREENFIELD GCCs

## HEADQUARTERS SPLIT AND SPLIT BY GCC UNIT SIZES



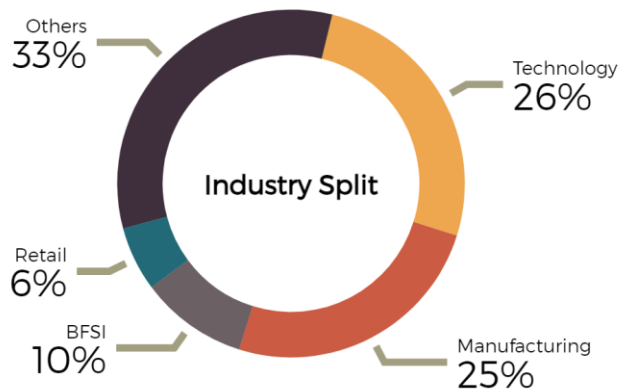
**Greenfield GCCs by Headquarters**

USA REMAINS THE TOP CONTRIBUTOR TO GREENFIELD GCCs WITH 73% OF THE ENTERPRISES HEADQUARTERED IN US.



**Greenfield GCCs by Unit Size**

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

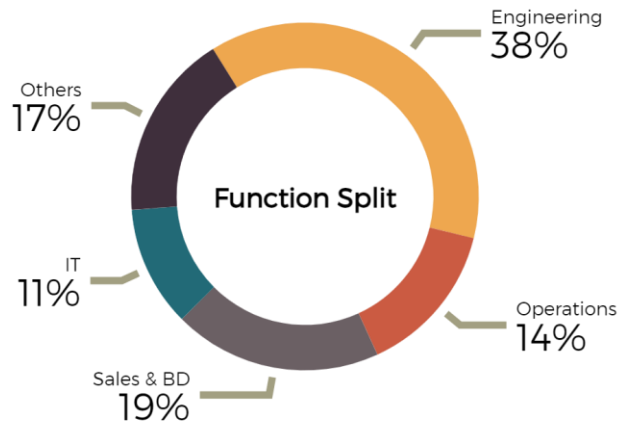


TECH & MANUFACTURING SECTORS DOMINATE, ACCOUNTING FOR 51% OF THE GREENFIELD LANDINGS IN THE 30 MONTH PERIOD.

### Greenfield GCCs by Industry

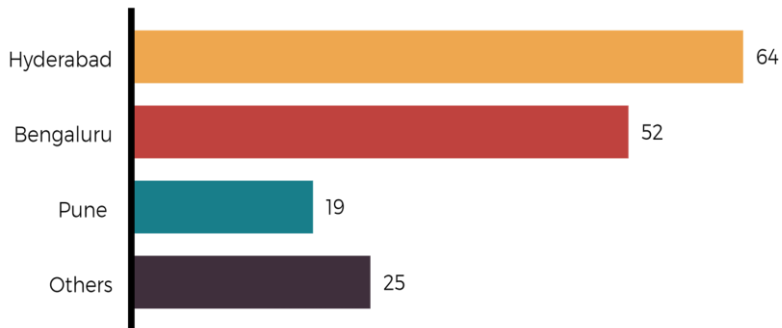
### Greenfield Workforce by Function

ENGINEERING & IT ARE THE LARGEST FUNCTIONS, ACCOUNTING FOR 49% OF THE GREENFIELDS' ESTABLISHED WORKFORCE.

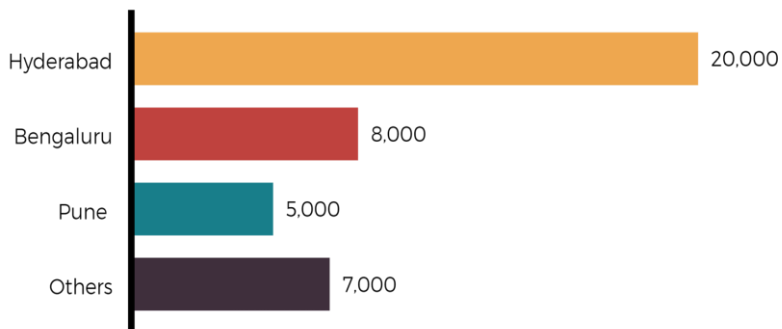


# GREENFIELD GCCs

## UNITS AND HEADCOUNT BY LOCATIONS



**Greenfield Units by Locations**



**Greenfield Headcount additions by Locations**

WHILE BENGALURU CONTINUES TO BE THE GCC CAPITAL OF INDIA, HYDERABAD IS SEEN GAINING TRACTION AS A LOCATION OF CHOICE FOR GCCS

# India GCCs

Indian Talent. Global Capabilities.

September 2025

A Workforce Research release by



## Xpheno

Xpression ONE, No.76, 3rd Cross Road,  
Residency Road, Ashok Nagar, Bengaluru 560025, IN

**Contact: Kedar Pathak**

**kedar.p@xpheno.com | +91-98223-77333**