

KARNATAKA  
**GCCs**

**JUNE 2025**

**THE  
SPECIALIST  
TALENT  
ADVANTAGE**

**YOURSTORY** | **Xpheno**



**“ The world is looking to India, and India is looking to Karnataka...**

**Shradha Sharma**

Founder & CEO, YourStory

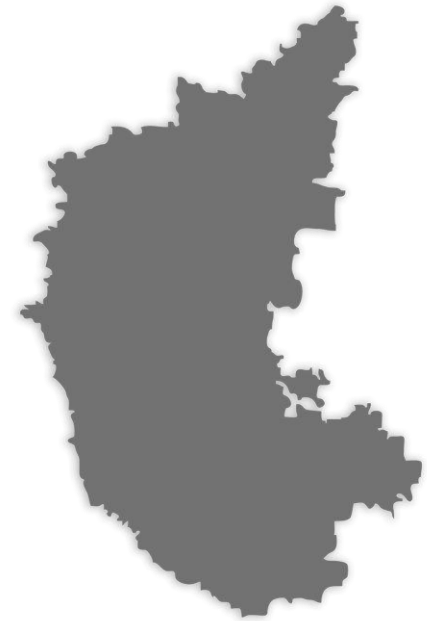
**“ Karnataka is undeniably the GCC Growth Engine for India...**

**Kamal Karanth**

Co-Founder, Xpheno

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## Foreword

### **The World is looking to India**

India has always been a land of ideas and ambition. For centuries, our country has been a hub of ingenuity, where talent meets tenacity to create solutions that shape not just local landscapes but also global futures. Today, as we stand on the cusp of an AI-driven world, India is leading yet another revolution—this time as the powerhouse of Global Capability Centres (GCCs).

GCCs are not just offices; they are crucibles of innovation, strategic thinking, and technological transformation. With over 1,800 GCCs operating in India, employing more than 1.8 million skilled professionals, these centres are redefining what it means to build, innovate, and grow at scale. The numbers tell a compelling story, but what truly sets India apart is the quality of its talent—and Karnataka has been pivotal in this journey.

Often referred to as the Silicon Valley of India, Karnataka is a mindset of relentless innovation and opportunity. Bengaluru, its beating heart, has been at the forefront of India's GCC narrative, hosting over 42% of the country's GCC workforce. This state's talent pool is unique, diverse, adaptable, and hungry for excellence. From engineering and design to leadership and decision-making, Karnataka's talent is second to none, driving value for global enterprises like never before.

But why has the state emerged as the epicentre of this growth? The answer lies in several factors: thriving tech talent, robust infrastructure, and a culture of collaboration among academia, industry, and policymakers. Add to this a proactive state government, which understands business nuances, and you have the perfect recipe for an enabling environment.

What's particularly remarkable is the leadership calibre within Karnataka's GCCs. From seasoned professionals who bring decades of expertise to emerging leaders who embody the spirit of new-age thinking, these leaders are driving strategic imperatives, creating intellectual property, and steering global decision-making from Indian shores.

Of course, there are challenges. The rapid scale of GCCs has created intense competition for talent, even as organisations strive to retain top performers. The growing demand for niche skills in artificial intelligence, data analytics, or cybersecurity is shaping a new era of talent dynamics. Karnataka's ability to not just supply but sustain this talent at scale will be critical in determining its future trajectory.

This report, a collaborative effort between YourStory and Xpheno, dives into the heart of this ecosystem. It goes beyond the surface to explore the richness of the talent pool, the corridors of talent movement, and the unique dynamics that make Karnataka's GCCs a global phenomenon.

Through in-depth research and data-driven insights, we aim to shine a spotlight on the talent construct, leadership quality, and sustainable growth pathways that define Karnataka's GCC story.

At YourStory, we have always believed in the power of stories to inspire, inform, and ignite change. This report is a celebration of the people, policies, and practices that have made Karnataka a beacon for GCCs worldwide. It is a testament to what is possible when talent meets opportunity, when vision meets execution, and when local capabilities create global impact.

As we look ahead, the role of GCCs in shaping the future of work, innovation, and leadership cannot be overstated. From advancing digital transformation to creating inclusive workspaces, from driving sustainability initiatives to fostering cross-border collaboration, GCCs are not just participants but pioneers of change. And Karnataka, with its unmatched ecosystem, will continue to be at the forefront of this evolution.

Let this report serve as both a guide and a galvaniser. Together, let's build on this incredible foundation and take the GCC story to unprecedented heights.

After all, the world is looking to India, and India is looking to Karnataka.

Here's to the talent, the vision, and the limitless possibilities ahead.

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**Shradha Sharma**  
Founder & CEO, YourStory



## Executive Summary

### **Karnataka GCCs - The Specialist Talent Advantage**

Karnataka is at the cusp of going past its popular identity as a global tech hub and silicon valley of India. The State is clearly on its pathway to becoming a Global Talent Hub for both Tech & Non-Tech functions alike. Karnataka's maturity in and fluency of serving technology & engineering needs of Global enterprises has been seamlessly extended to non-tech enterprise functions as well. Transitioning from serving the capacity needs of Shared Service Centers to now offering specialist capabilities to Global Business Services (GBS) units, has been an easy movement into a domain of adjacency for the State.

Catching the GCC wave earlier than rest of India, has given Karnataka, and specifically Bengaluru, a massive advantage in leading India's GCC evolution from the front. The State now has a key role to play behind...

...India being host to nearly 50% of GCCs worldwide

...India employing over 1.8 Million GCC talent and set to grow to more than 2.6 Million by 2030

...India generating more than 65 Billion\$ in export revenues and set to reach 100 - 110 Billion\$ by 2030

...India currently hosting over 7000 Global roles across GCCs and set to host 30K Global roles by 2030

Karnataka is undeniably the GCC Growth Engine for India with 890+ units and 7.5 Lakh active workforce.

## Karnataka GCC Talent Landscape

- Karnataka has an active and accessible white-collar talent base of 68.70 Lakh. Talent pool with minimum working experience of 1 Year is 41.1 Lakh, accounting for 60% of the active talent pool.

- GCCs in Karnataka currently employ a total of 7.50 Lakh employees across the state. The GCC talent pool accounts for 11% of the total active white-collar talent pool of the State and nearly one-fifth of the experienced talent pool.

- Greater Bengaluru Region of Karnataka holds nearly 98% of the active experienced talent pool of GCCs. While there's notable interest in other locations like Mysuru, Mangaluru, Hubballi, Tumakuru etc. the current active capacity in these centers are nearly negligible.

- IT / ITes GCCs are the lead employment cohort holding 50% (3.8 Lakh) of the active experienced GCC talent pool. The IT/ ITes Sector leads rest of the sectors like BFSI, Manufacturing and Healthcare by a huge margin.

- The Tech & Engineering function holds over 50% of the GCC talent pool with 3.77 Lakh active workforce.

### PTB status of Karnataka's GCCs

We studied the Talent Corridors and Talent Exchange Patterns of GCCs for the 12-month period ending May 2025. Karnataka and its GCCs received a special focus in the study & this report highlights the key findings as follows:

- 3 Indian states emerged as Talent Positive states or states with Positive Talent Balance (PTB) in the GCCs cohort.

- Karnataka emerged as the No.1 Indian state with Positive Talent Balance in the GCCs cohort with PTB of 18,000+. Karnataka's GCC cohort achieved PTB status with 32,000+ talent absorptions and 14,000 talent lost during the 12-month period.

### Leadership Talent Advantage

- Karnataka's GCCs collectively hold over 4100+ active senior leaders across different enterprise functions. 94% of this leadership pool are senior talent holding operational & strategic leadership roles.

- Karnataka's GCCs are also investing in a leadership lineup with an additional 8000+ role holders in other senior positions.

### Desirability & Talent Pull

- Karnataka's GCCs with a strong lineup of international marquee brands as employers, significantly contribute to Karnataka's desirability among jobseekers.

- A strong talent pull is evident with over 26 Lakh jobseekers, from other states stating Karnataka as a preferred location.

**Karnataka's GCCs with their Specialist Talent Pools and Global Capabilities continue to keep the State as a hotspot on the Global Map for tech and non-tech needs.**

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### Kamal Karanth

Co-Founder, Xpheno

# India GCCs - Hotspots

## NUMBERS TO REMEMBER...

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

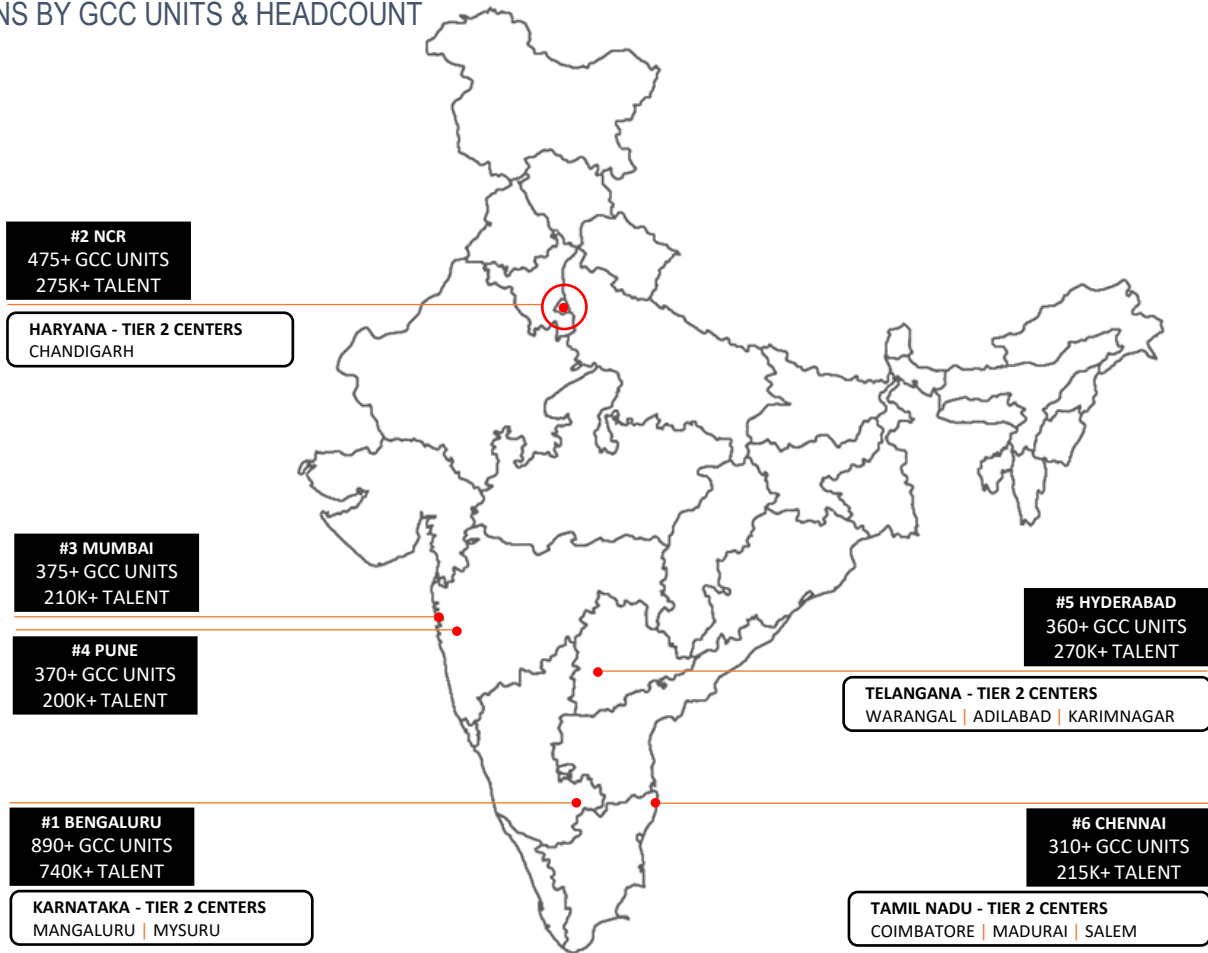
EMPLOYS OVER **1.8Mn** PEOPLE. SET TO GROW TO **2.5 – 2.8Mn** BY 2030

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

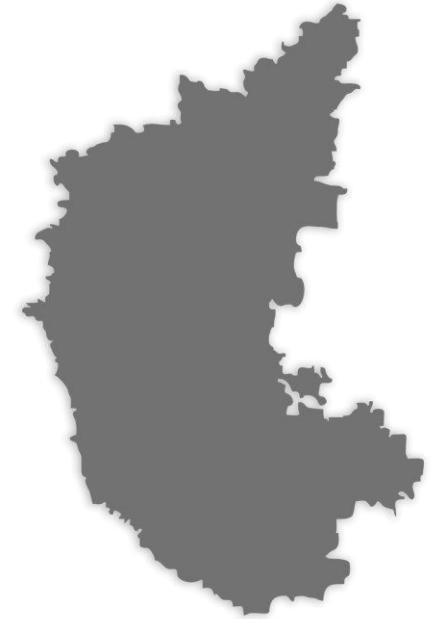
## LOCATIONS BY GCC UNITS & HEADCOUNT

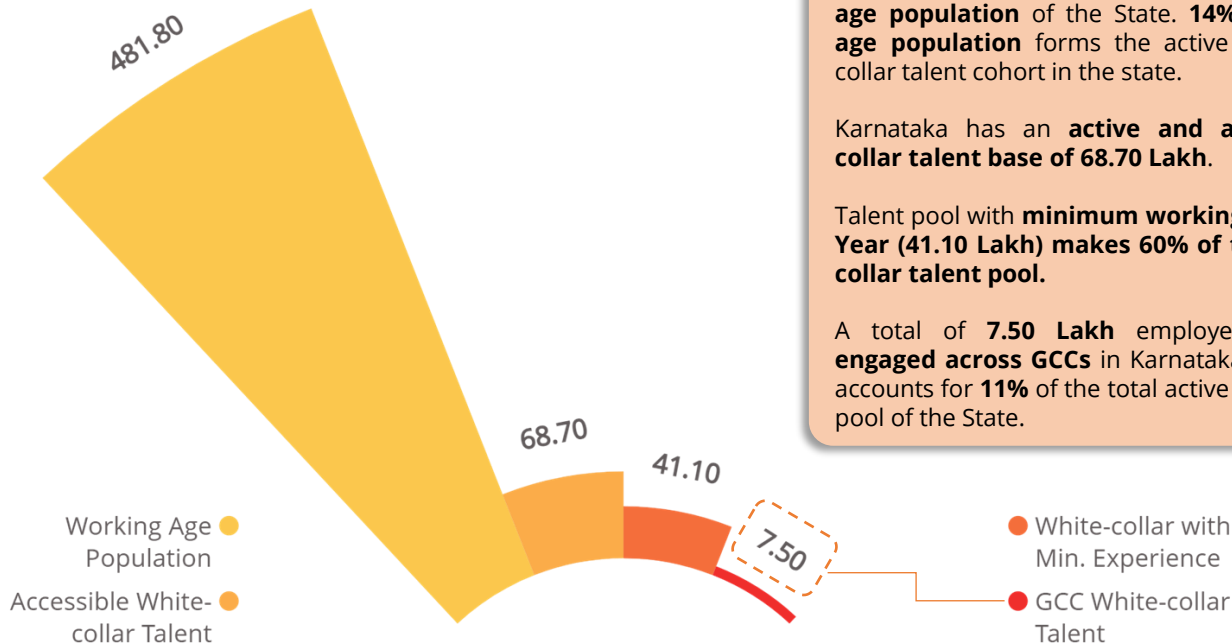


SECTION A1

# GCCs Talent Landscape

Karnataka





**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.

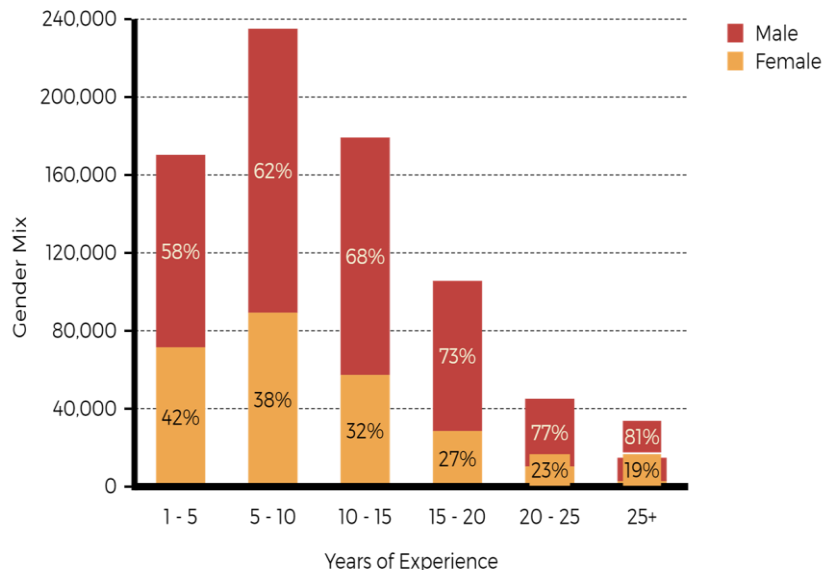
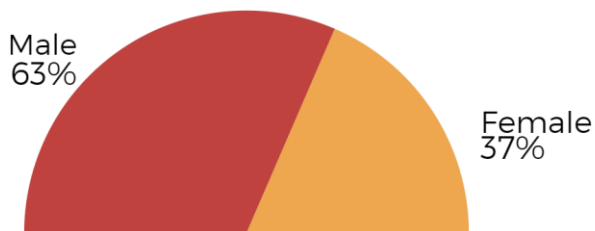
Karnataka has an **active and accessible white-collar talent base of 68.70 Lakh**.

Talent pool with **minimum working experience of 1 Year (41.10 Lakh)** makes **60% of the active white-collar talent pool**.

A total of **7.50 Lakh** 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.

\* Numbers in Lakh

## GENDER & EXPERIENCE DISTRIBUTION OF ACCESSIBLE GCC TALENT



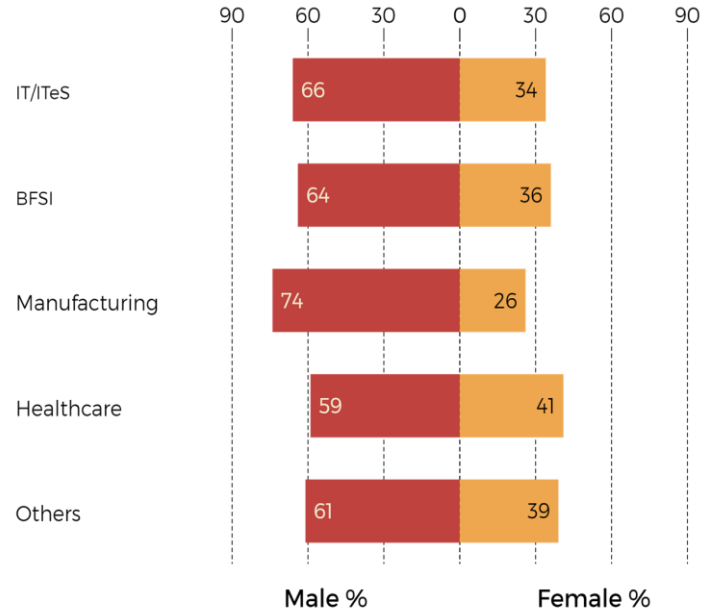
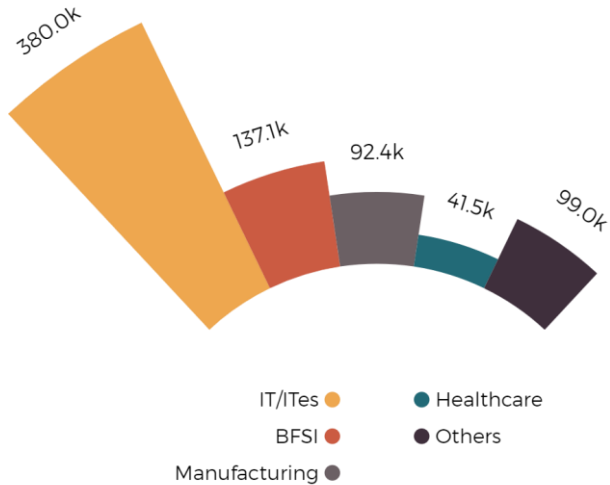
GCC talent in Karnataka holds an experience mix that makes a **narrow base of 1.7 Lakh entry-level talent**. The **mid-experience layer or 5 to 10 years** account for a significant **2.35 Lakh (31%)** of total GCC talent pool in Karnataka.

**Mid-senior level talent** in the 10 to 20 years of experience range account for **2.85 Lakh (38%)** and **Senior talent** in the 20+ years of experience make **8% of the GCC talent pool in Karnataka**.

**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.

# KARNATAKA GCC TALENT

## TOP INDUSTRY GROUPS BY ACCESSIBLE GCC TALENT VOLUME

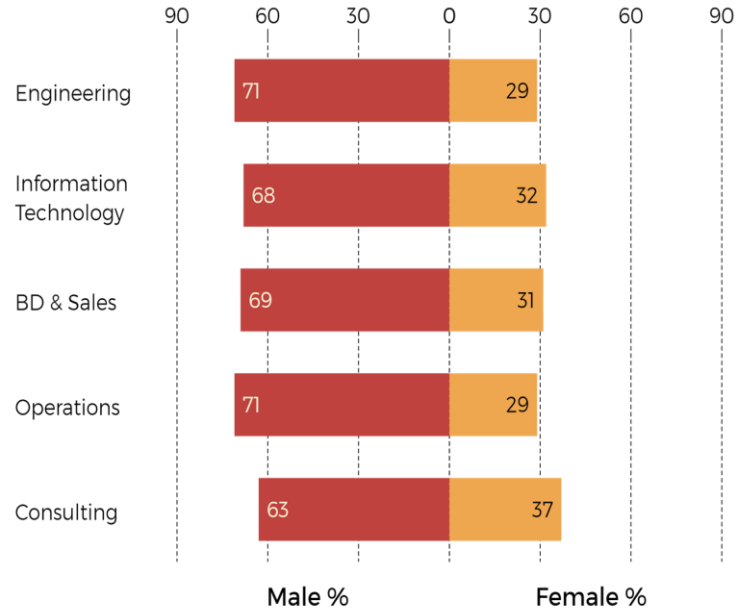
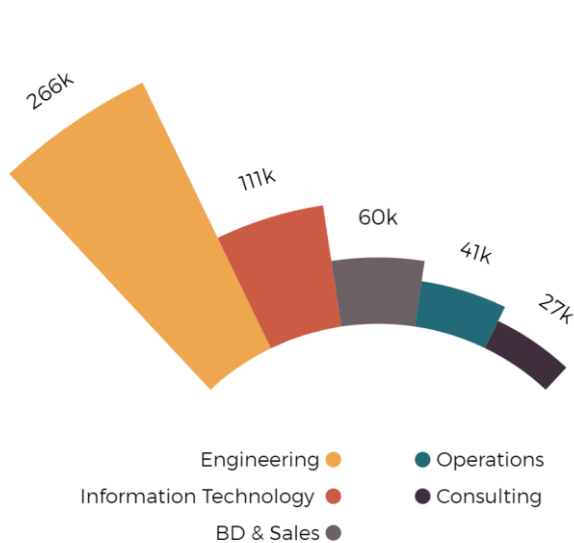


IT/ITes cohort of Karnataka's GCCs is the lead employment sector for active talent. **Over 50% (3.80 Lakh) of the total GCC talent pool of Karnataka is engaged by the IT/ITes Cohort.**

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

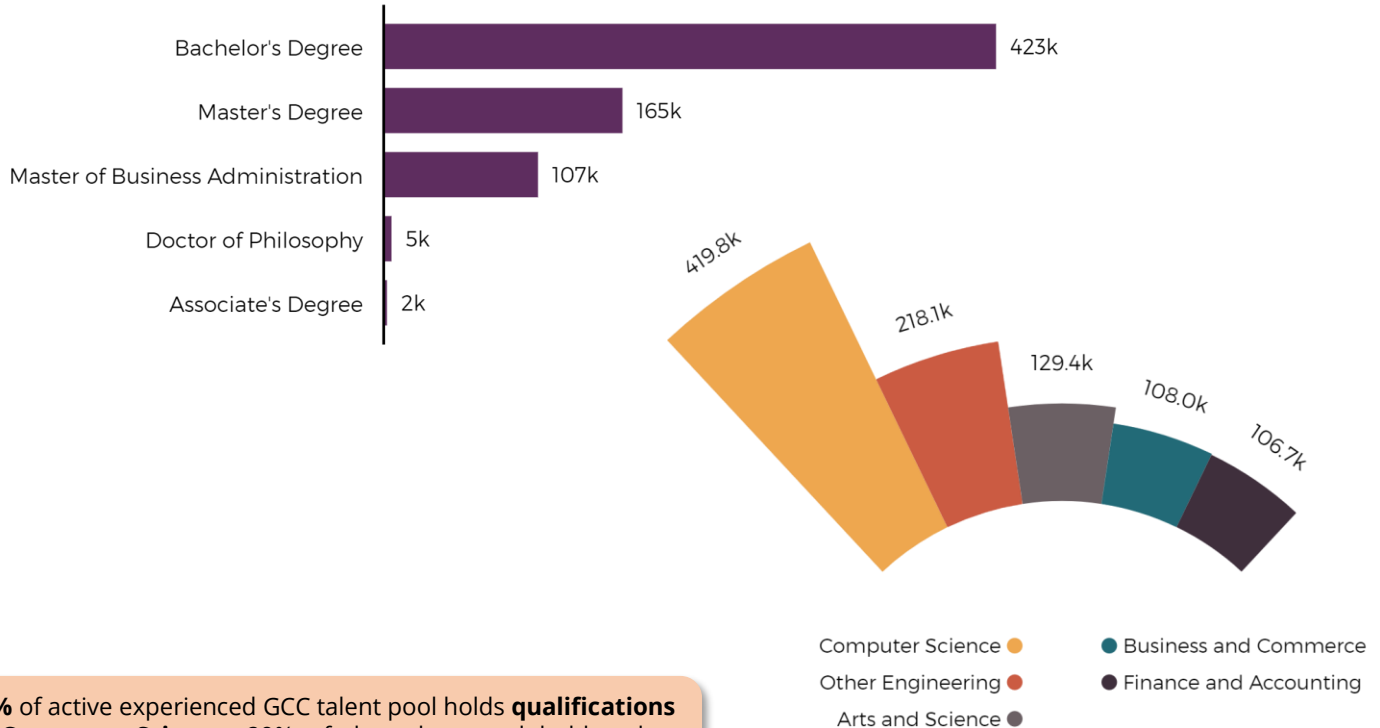
# KARNATAKA GCC TALENT

## TOP ENTERPRISE FUNCTIONS BY ACCESSIBLE GCC TALENT VOLUME



**Top 5 Enterprise Functions** collectively account for over **67% of GCC talent** of Karnataka. The Engineering & Information Technology functions are on the lead with a collective 3.77 Lakh headcount. As a collective of key enterprise functions, this cohort of Engineering & Information Technology, accounts for over 50% of the total GCC talent of Karnataka.

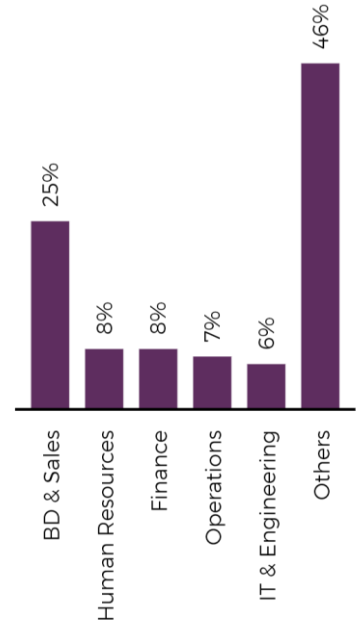
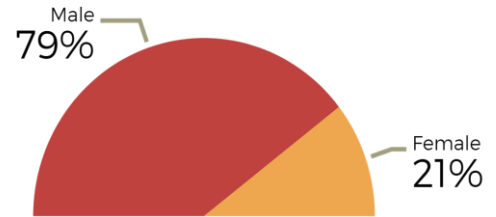
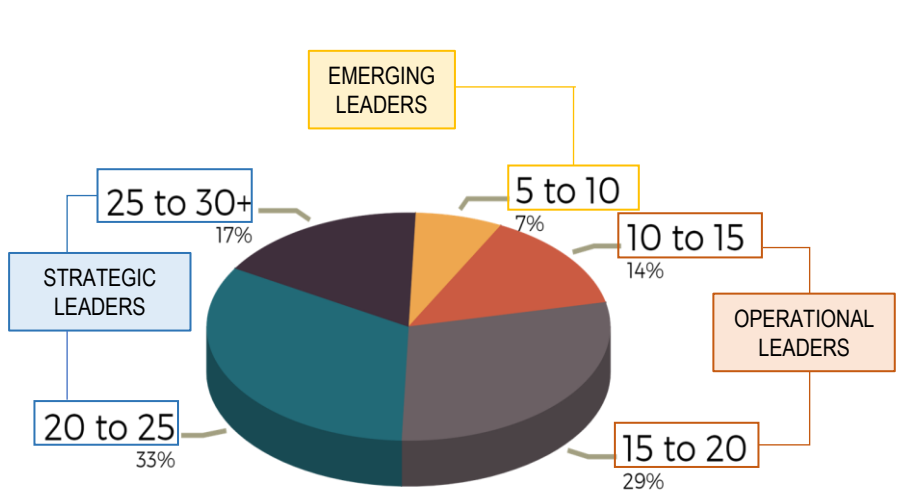
## DISTRIBUTION BY TOP QUALIFICATIONS AND EDUCATION STREAMS



**56%** of active experienced GCC talent pool holds **qualifications in Computer Science**. 29% 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 Karnataka have.

# GCC LEADERSHIP TALENT SNAPSHOT - KARNATAKA

EXPERIENCE, GENDER & FUNCTIONAL DISTRIBUTION OF LEADERSHIP TALENT



\* Numbers denote total years of experience

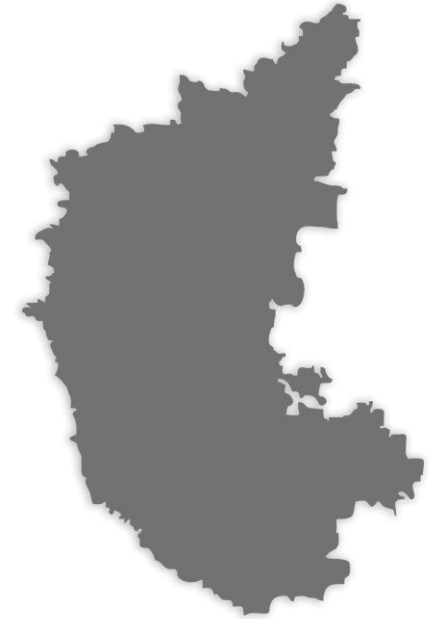
Karnataka's GCCs have an **active accessible talent pool of 4100+ senior leaders** across various enterprise functions. 94% of this pool of leaders hold 10+ years of working experience and currently hold operational and strategic leadership roles.

The accessible GCC Leadership Talent pool of Karnataka has a **gender mix of 21% Female leaders and 79% Male leaders**. Karnataka's GCCs are also investing in a leadership lineup with an additional 8000+ role holders in other senior positions.

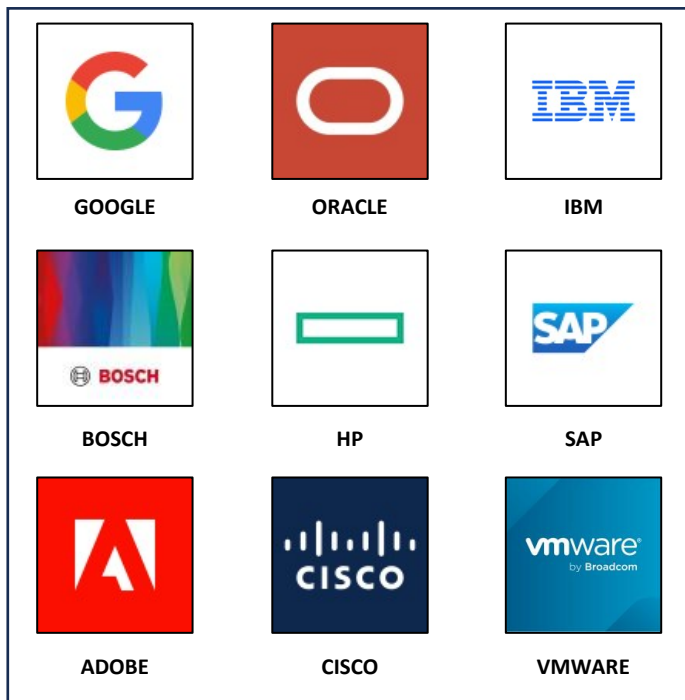
SECTION A2

# GCCs Talent Landscape

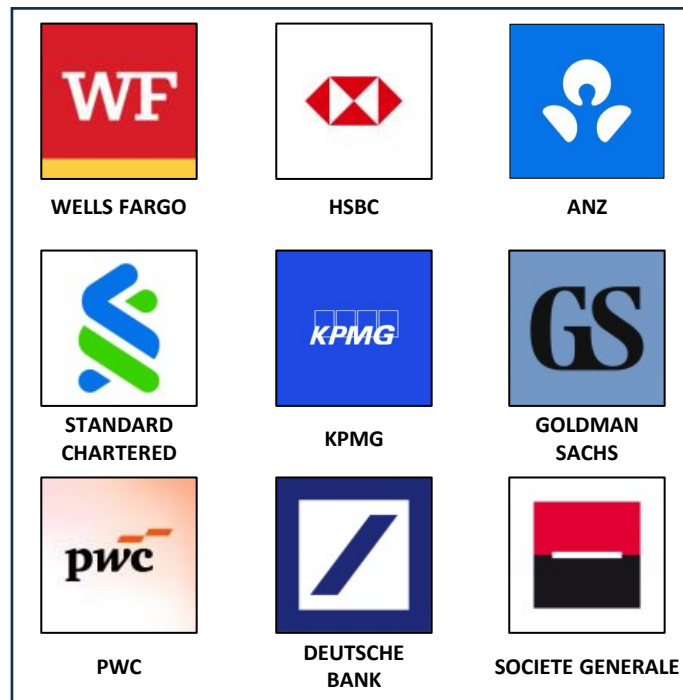
## Karnataka – Top Employers



### INFORMATION TECHNOLOGY



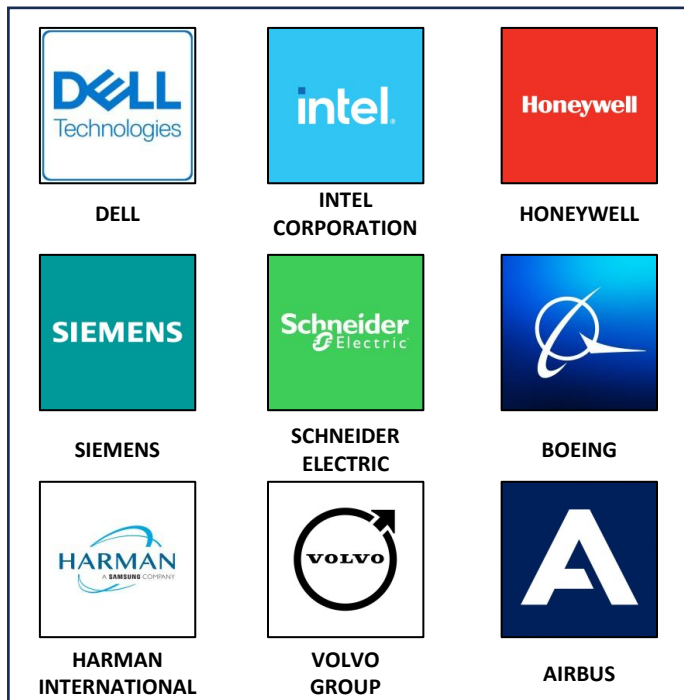
### BFSI AND ADVISORY SERVICES



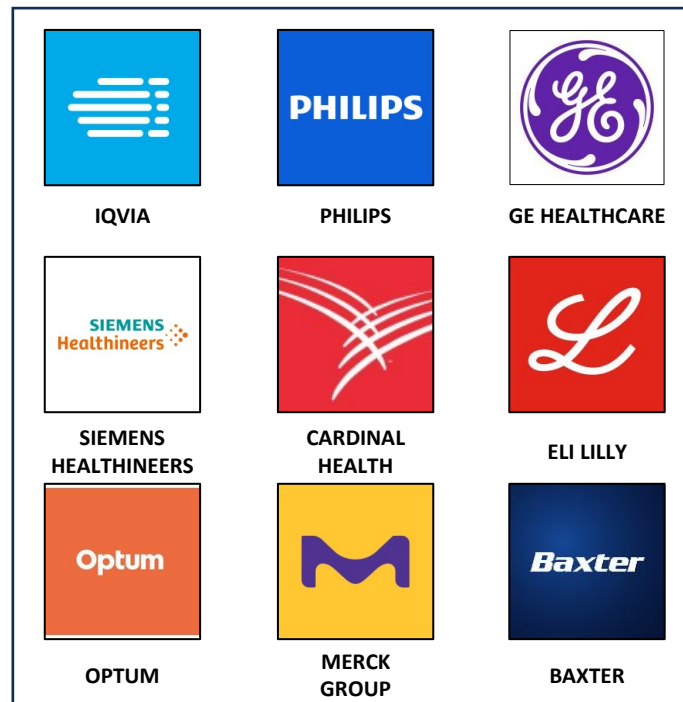
# KARNATAKA GCCs - TOP EMPLOYERS

TOP EMPLOYER BRANDS BY VOLUME OF GCC TALENT

## MANUFACTURING



## HEALTHCARE AND MEDICAL EQUIPMENT



SECTION B

# Net Talent Balance – India GCCs

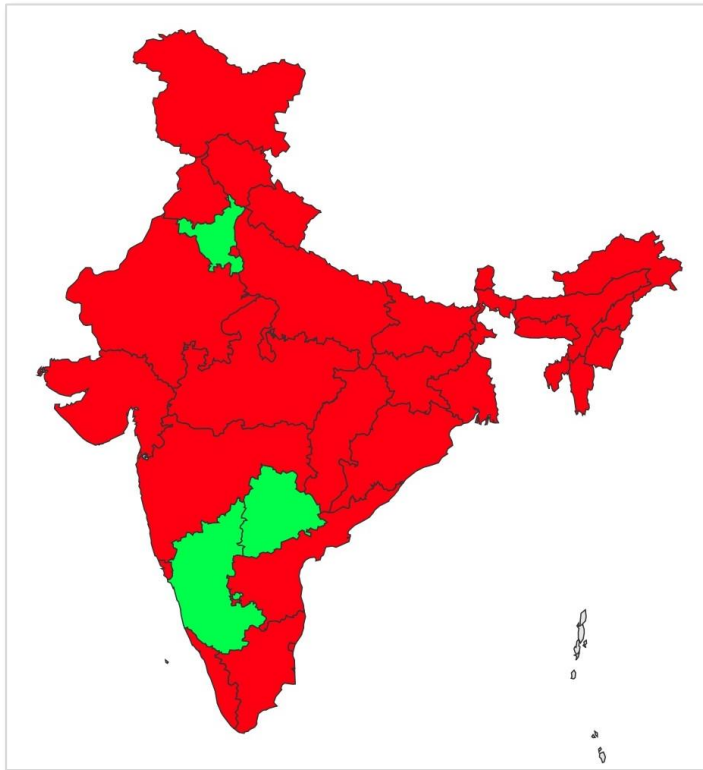
Talent Positive & Talent Negative

## 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
<b>Haryana</b>	<b>PTB</b>	Sikkim	NTB
Himachal	NTB	Tamil Nadu	NTB
Jammu & Kashmir	NTB	<b>Telangana</b>	<b>PTB</b>
Jharkhand	NTB	Tripura	NTB
<b>Karnataka</b>	<b>PTB</b>	Uttar Pradesh	NTB
Kerala	NTB	Uttarakhand	NTB
Madhya Pradesh	NTB	West Bengal	NTB
Maharashtra	NTB	Manipur	NTB

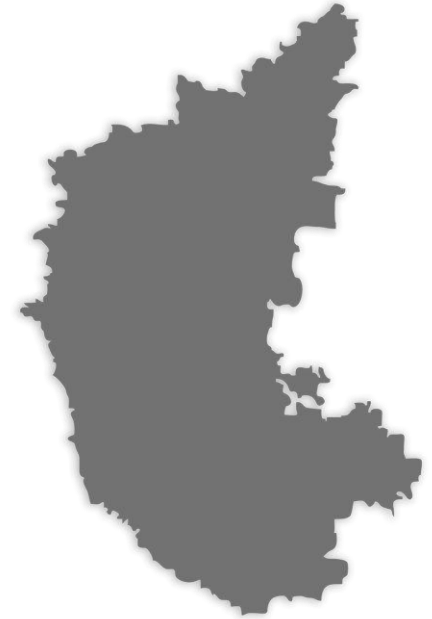
**GCCs of 3 states** have emerged Talent Positive in this study period. **The 3 states** by PTB value of GCCs are **Karnataka, Telangana and Haryana.**

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

SECTION C1

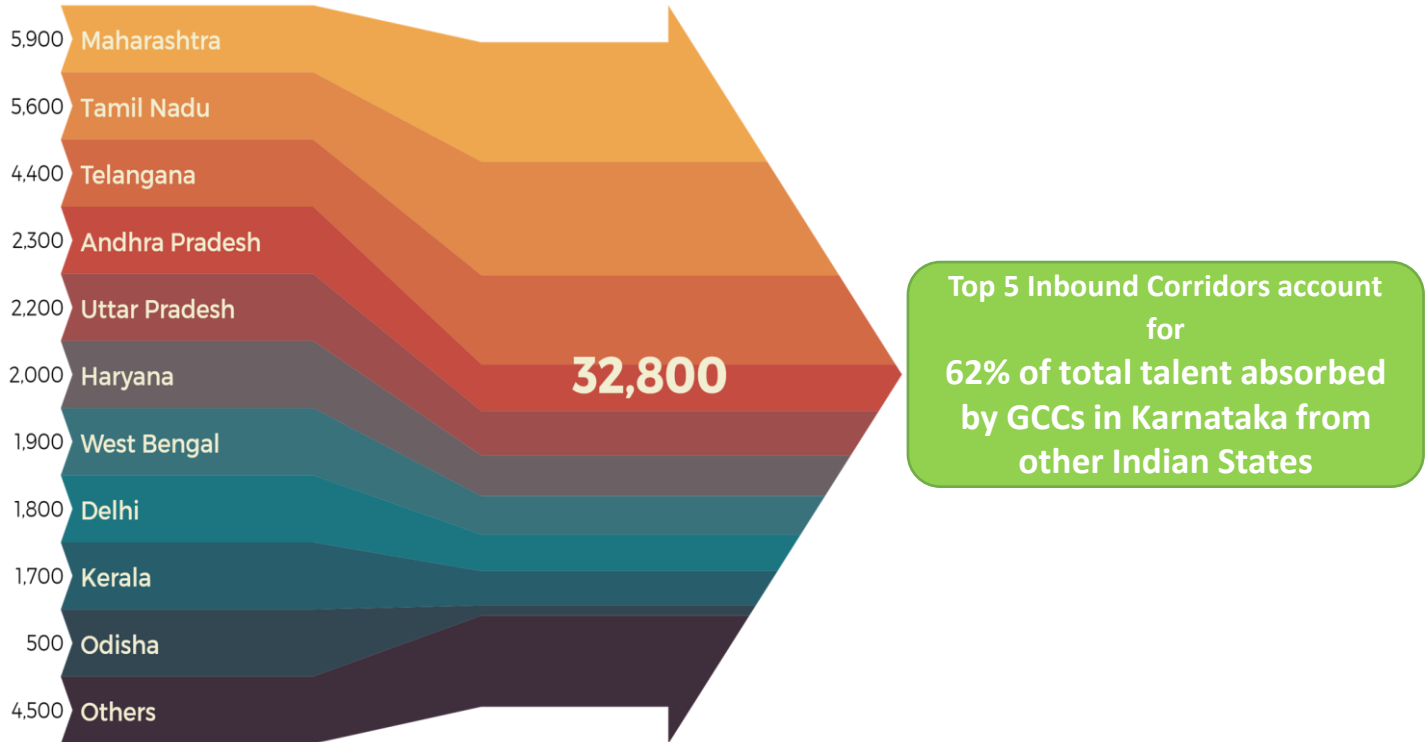
# Talent Movement Corridors - GCCs

- Karnataka State
- Bengaluru City



# KARNATAKA GCC TALENT MOVEMENT CORRIDORS

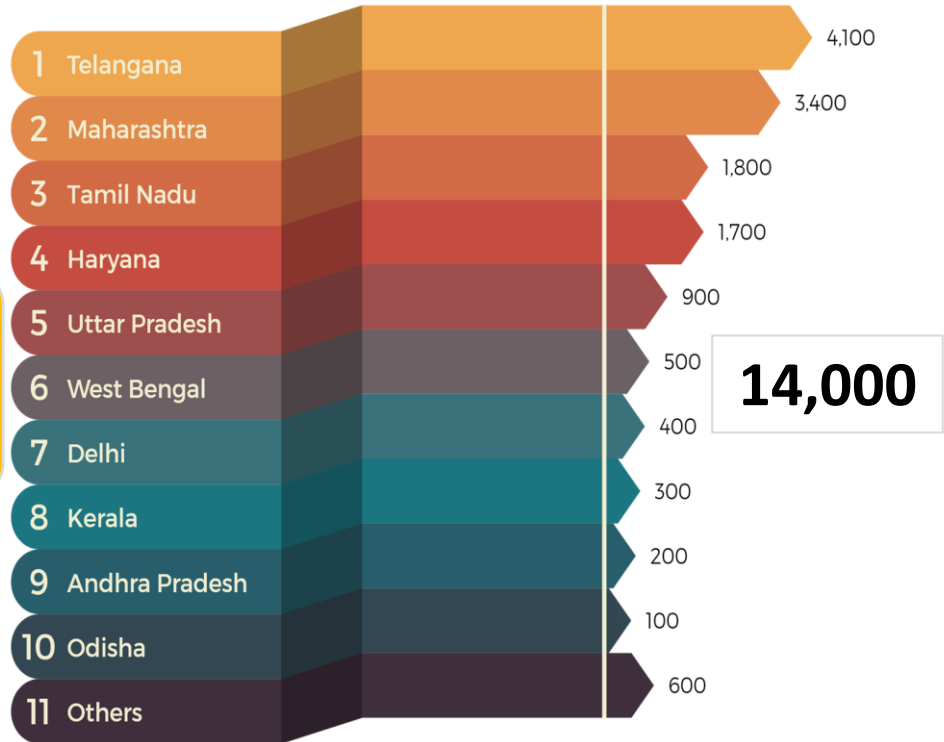
ABSORPTION FROM OTHER INDIAN STATES / UNION TERRITORIES – LAST 12 MONTHS



# KARNATAKA GCC TALENT MOVEMENT CORRIDORS

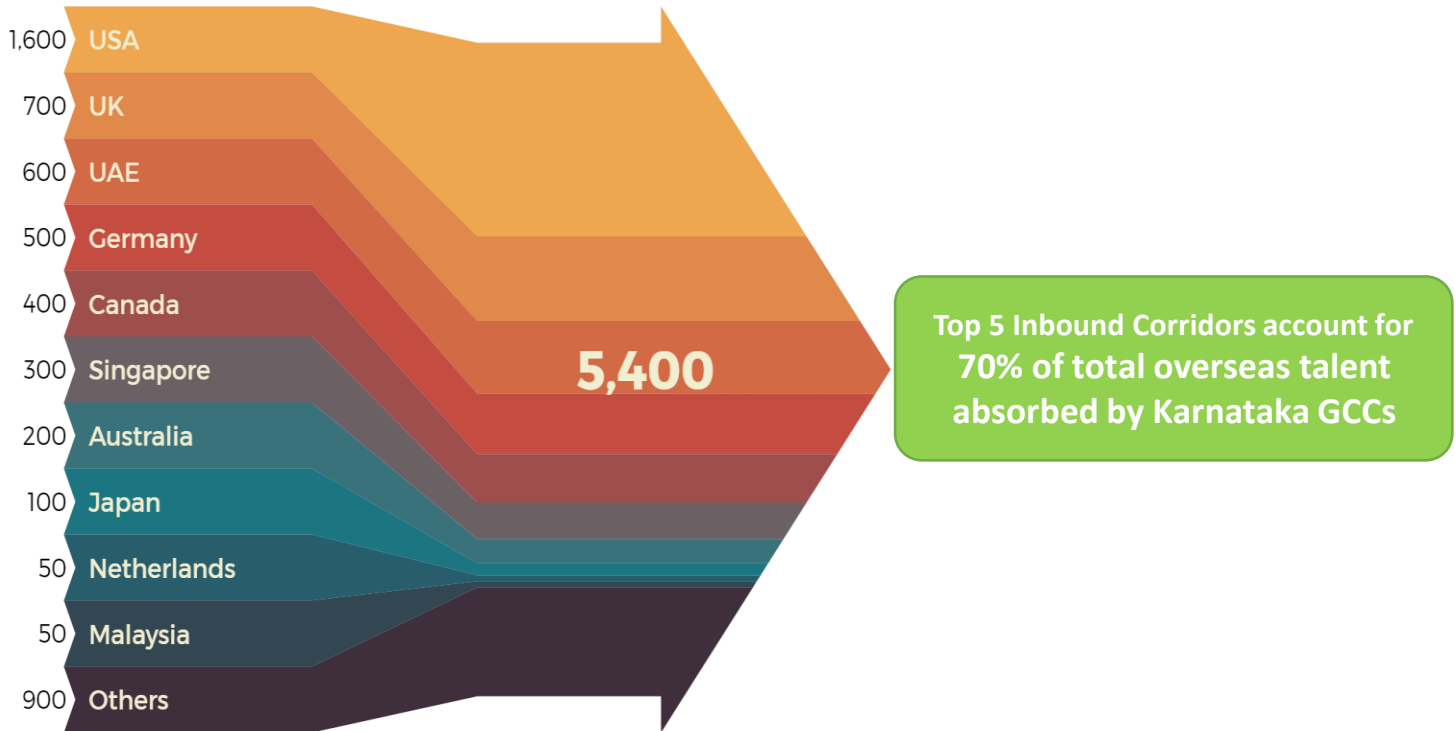
TALENT LOST TO OTHER INDIAN STATES / UNION TERRITORIES – LAST 12 MONTHS

Top 5 Outbound Corridors account For  
85% of total talent lost  
by Karnataka GCCs to  
other Indian States



# KARNATAKA GCC TALENT MOVEMENT CORRIDORS

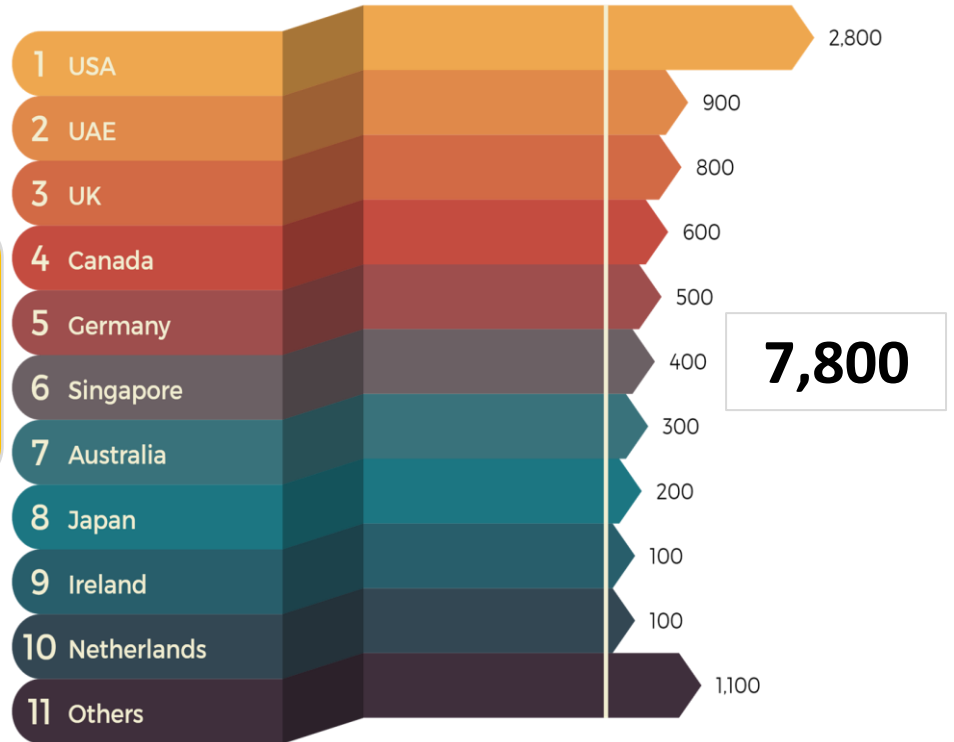
ABSORPTION OF OVERSEAS TALENT- LAST 12 MONTHS



# KARNATAKA GCC TALENT MOVEMENT CORRIDORS

TALENT LOST TO OTHER COUNTRIES – LAST 12 MONTHS

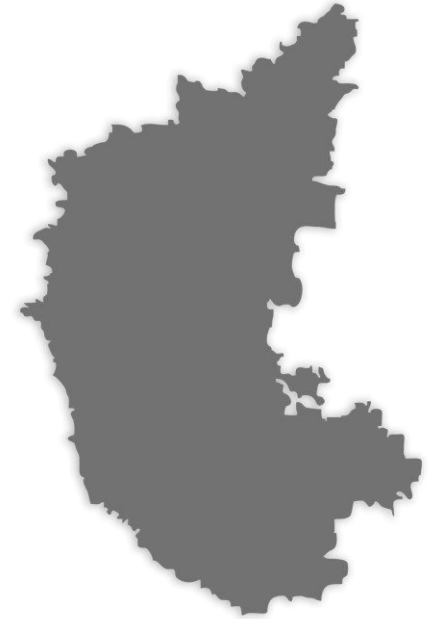
Top 5 Outbound Corridors account for 72% of total talent lost by Karnataka GCCs to other Countries



SECTION C2

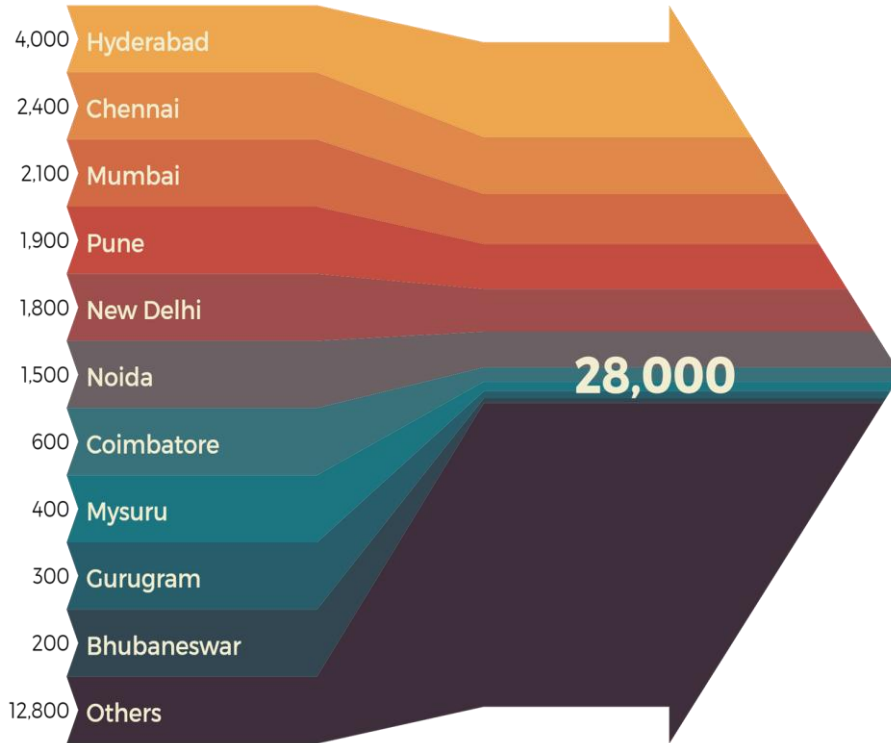
# Talent Movement Corridors - GCCs

- Karnataka State
- Bengaluru City



# BENGALURU GCC TALENT MOVEMENT CORRIDORS

ABSORPTION OF TALENT FROM OTHER INDIAN CITIES – LAST 12 MONTHS

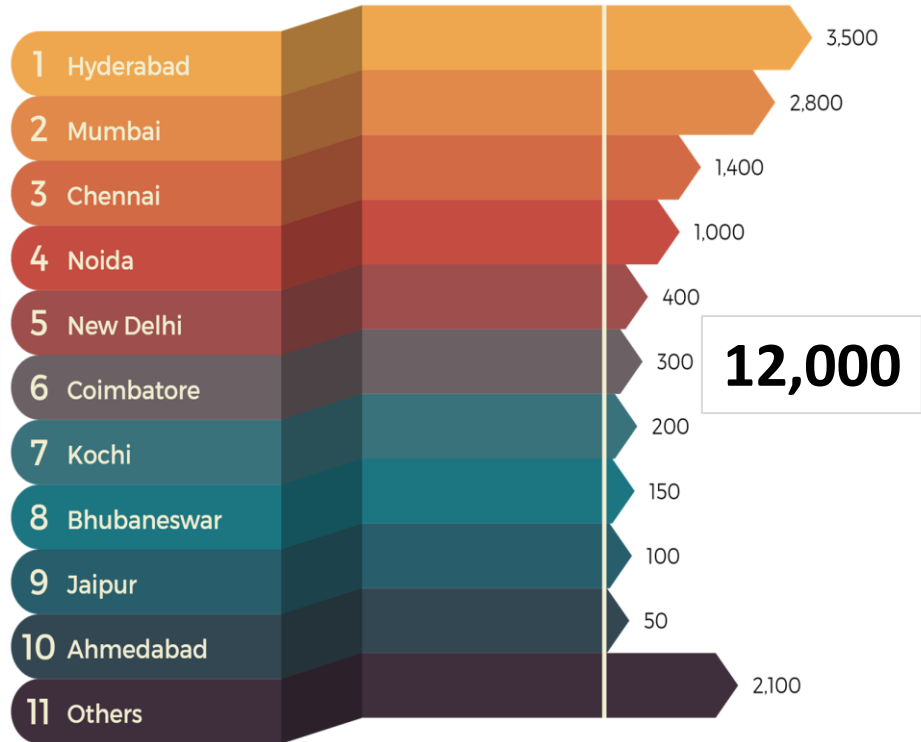


Top 5 Inbound Corridors account for 44% of total talent absorbed by Bengaluru GCCs from other Indian Cities

# BENGALURU GCC TALENT MOVEMENT CORRIDORS

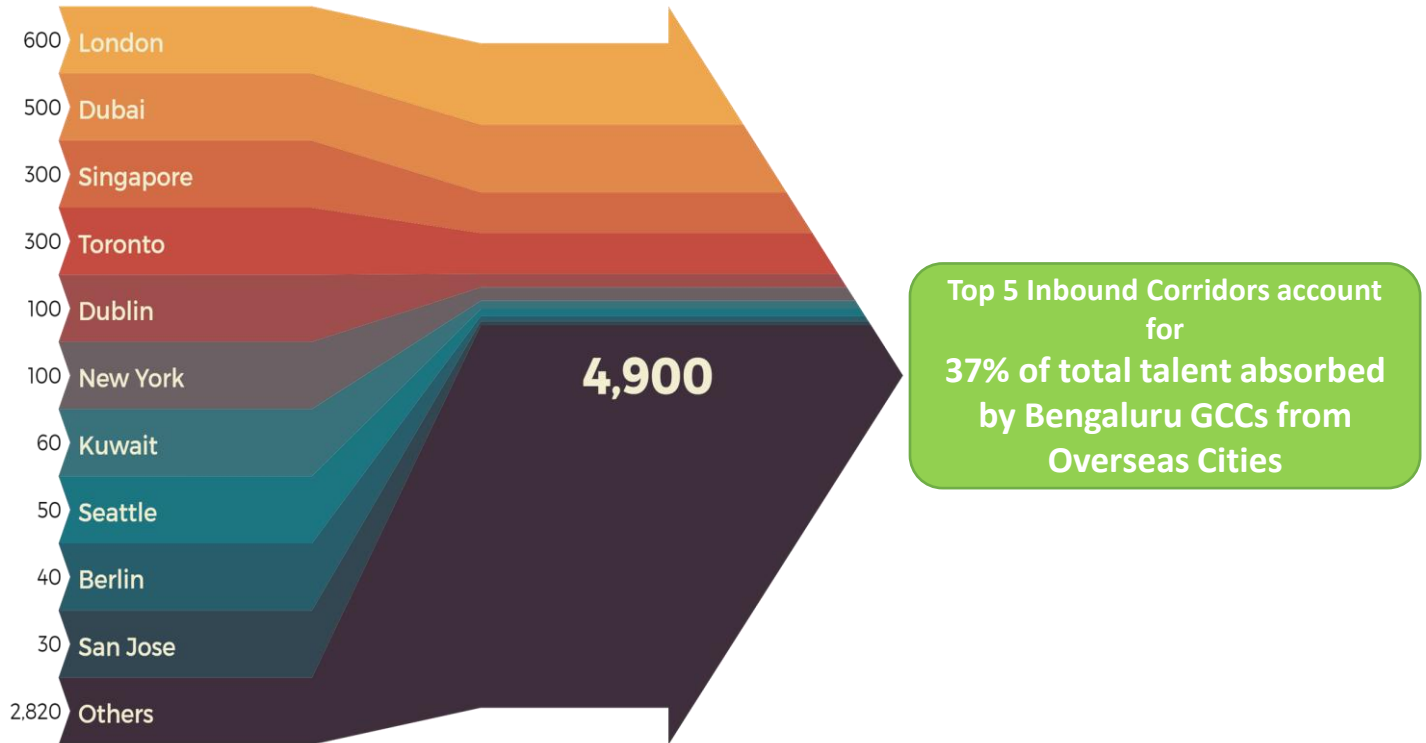
LOSS OF TALENT TO OTHER INDIAN CITIES – LAST 12 MONTHS

Top 5 Outbound Corridors account for 76% of total talent lost by Bengaluru GCCs to other Indian Cities



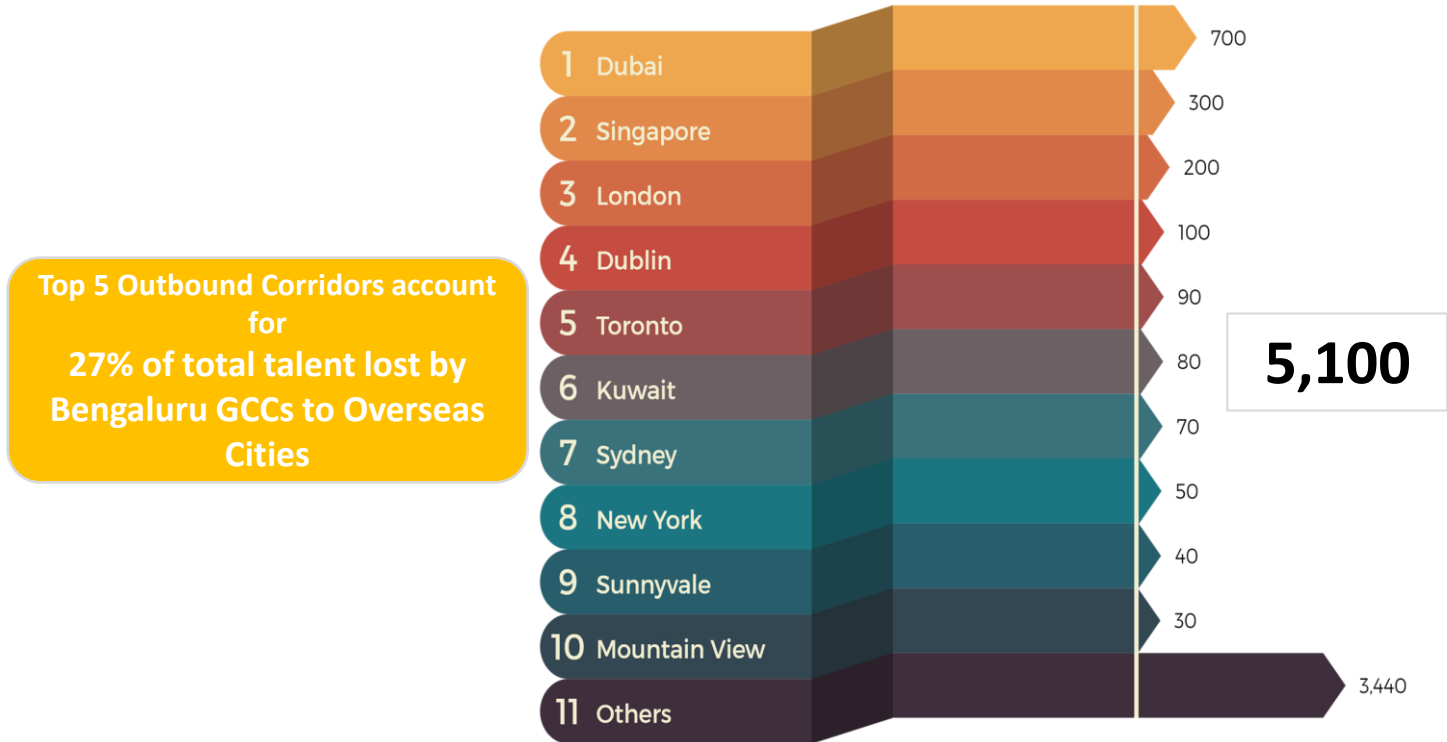
# BENGALURU GCC TALENT MOVEMENT CORRIDORS

ABSORPTION OF OVERSEAS TALENT – LAST 12 MONTHS



# BENGALURU GCC TALENT MOVEMENT CORRIDORS

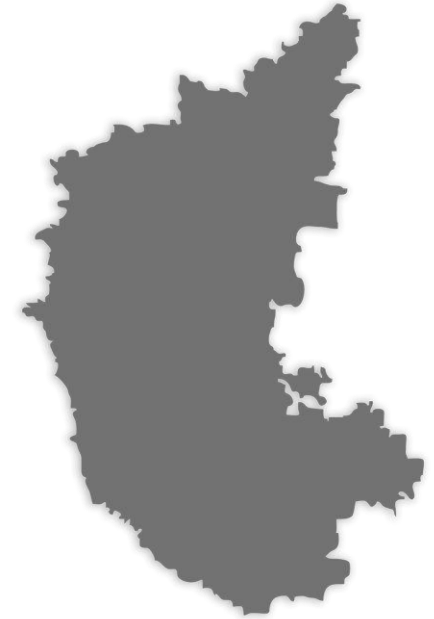
LOSS OF TALENT TO OVERSEAS CITIES – LAST 12 MONTHS



SECTION D1

# Talent Movement Corridors

- **Industry Sectors**
- Enterprise Functions
- Experience Buckets



# BENGALURU INTER SECTOR TALENT MOVEMENT

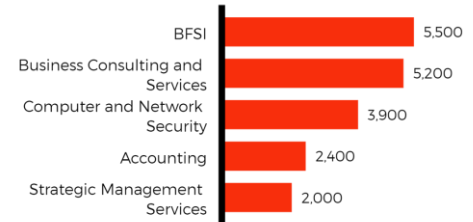
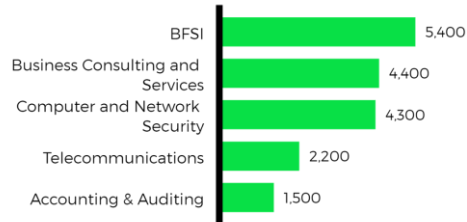
## INTRACITY TALENT EXCHANGED BETWEEN INDUSTRIES – LAST 12 MONTHS

### FOCUS SECTOR

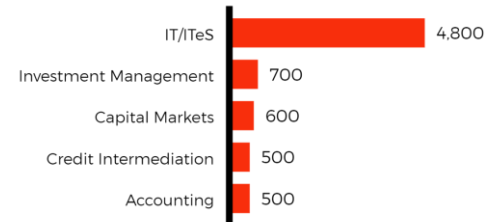
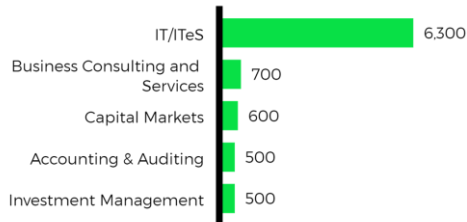
### TALENT GAINED FROM

### TALENT LOST TO

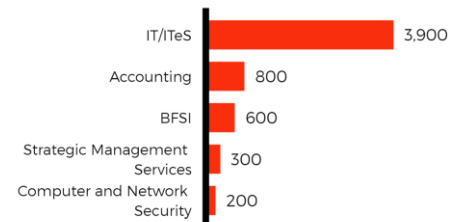
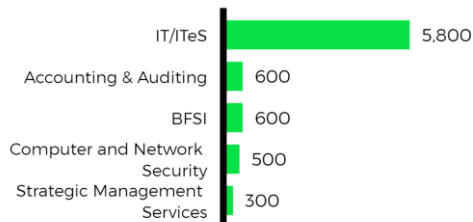
#### IT/ITeS



#### BFSI



#### Business Consulting and Services



IT/ITeS Includes: IT Services and Consulting, IT System Design Services, Software Development, Technology Information and Media

# BENGALURU INTER SECTOR TALENT MOVEMENT

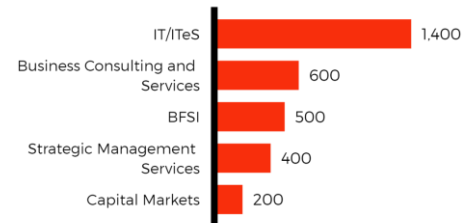
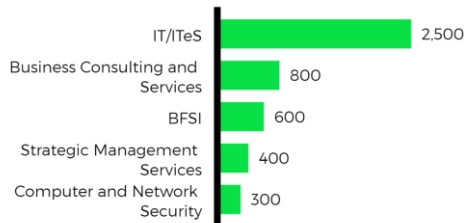
INTRACITY TALENT EXCHANGED BETWEEN INDUSTRIES – LAST 12 MONTHS

FOCUS SECTOR

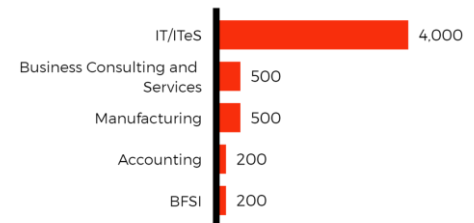
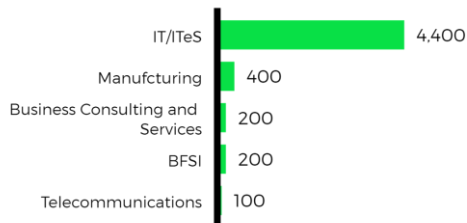
TALENT GAINED FROM

TALENT LOST TO

## Accounting & Auditing



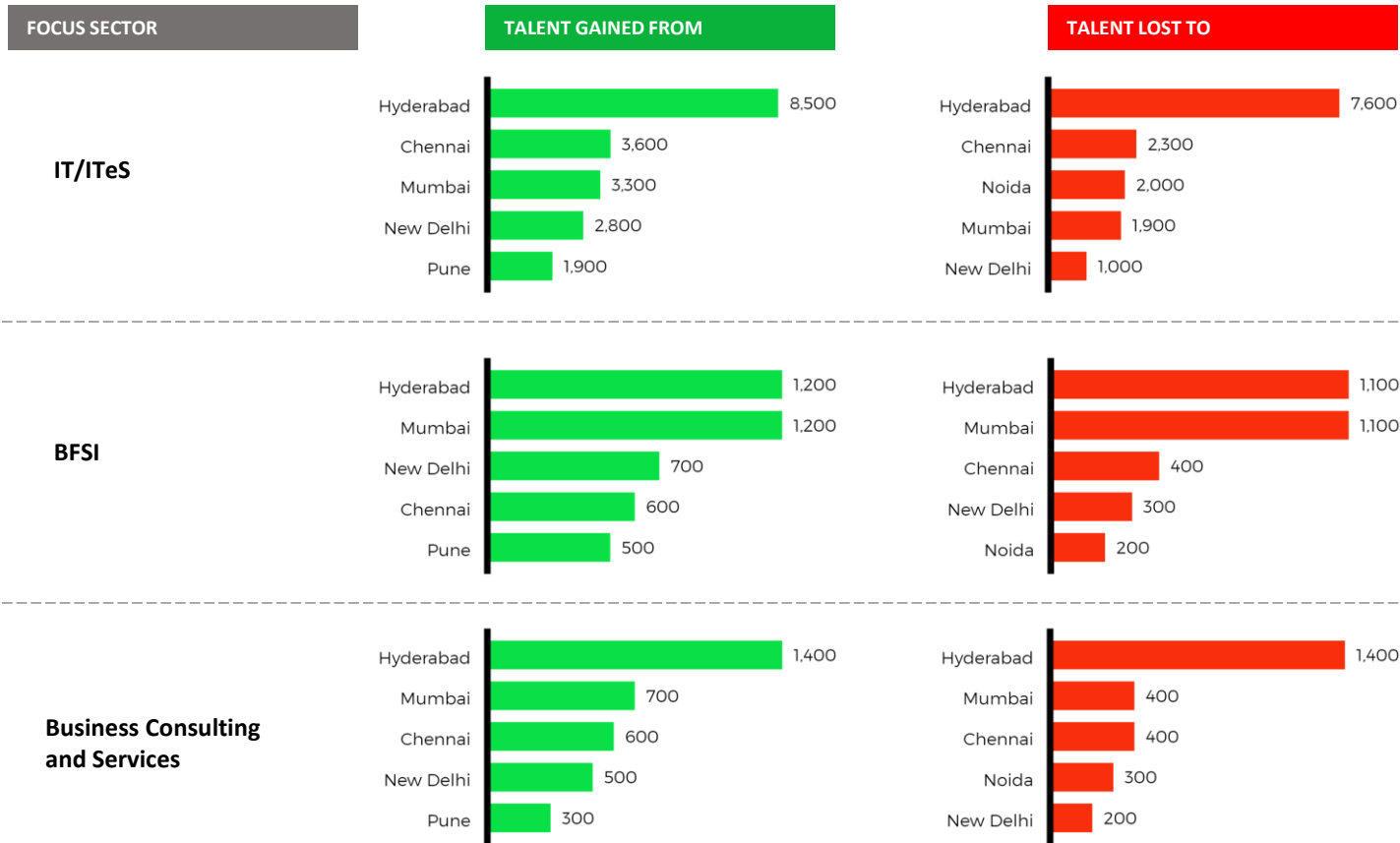
## Computer and Network Security



IT/ITeS Includes: IT Services and Consulting, IT System Design Services, Software Development, Technology Information and Media

# BENGALURU INTER CITY TALENT MOVEMENT

INTERCITY TALENT EXCHANGED BY TOP INDUSTRIES – LAST 12 MONTHS



IT/ITeS Includes: IT Services and Consulting, IT System Design Services, Software Development, Technology Information and Media

# BENGALURU INTER CITY TALENT MOVEMENT

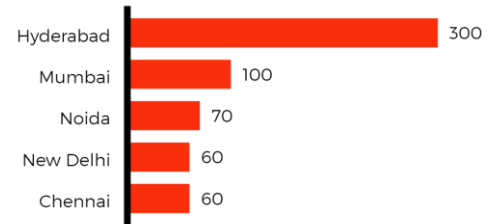
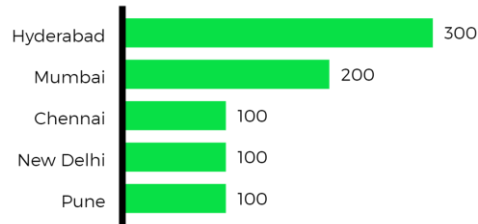
INTERCITY TALENT EXCHANGED BY TOP INDUSTRIES – LAST 12 MONTHS

FOCUS SECTOR

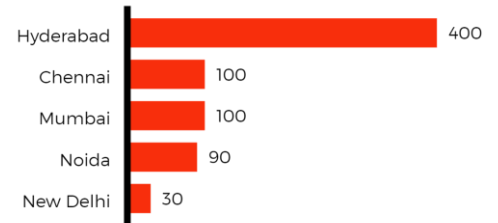
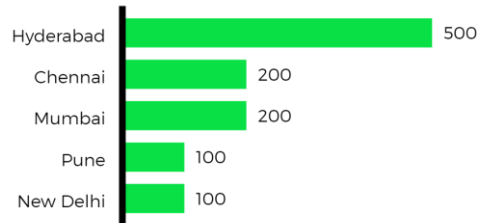
TALENT GAINED FROM

TALENT LOST TO

## Accounting & Auditing



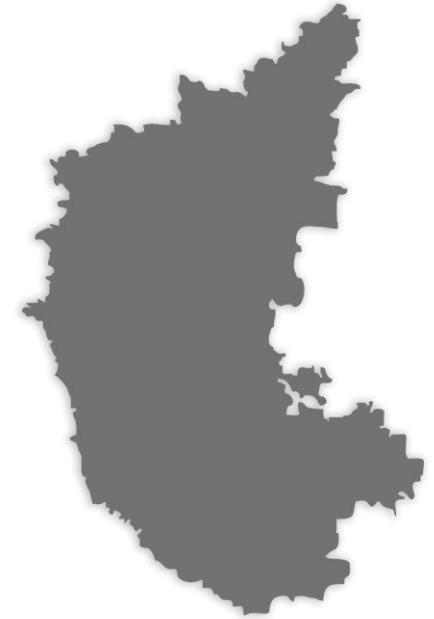
## Computer and Network Security



SECTION D2

# Talent Movement Corridors

- Industry Sectors
- **Enterprise Functions**
- Experience Buckets



# BENGALURU INTER CITY TALENT MOVEMENT

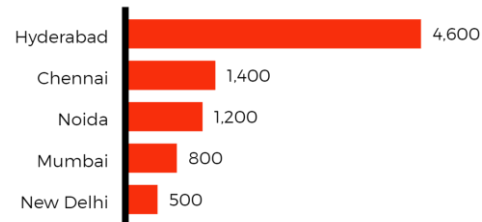
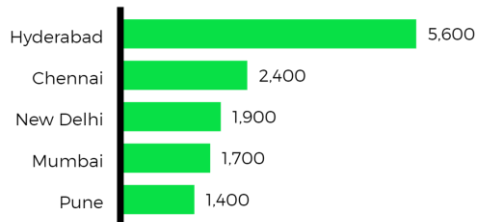
INTERCITY TALENT EXCHANGED BY TOP FUNCTIONS – LAST 12 MONTHS

## FOCUS FUNCTION

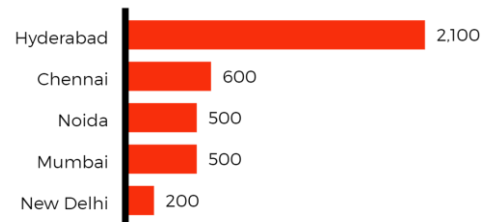
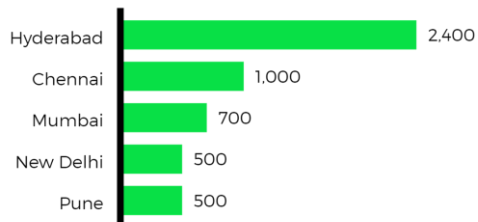
## TALENT GAINED FROM

## TALENT LOST TO

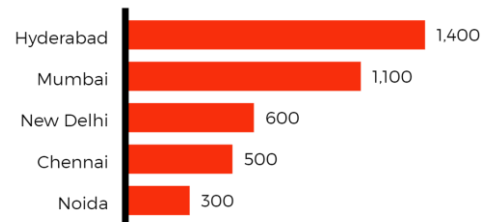
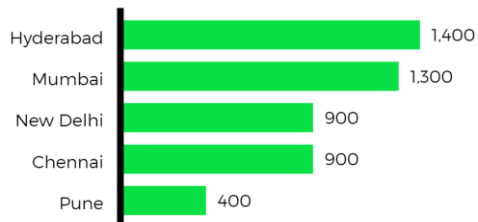
### Engineering



### Information Technology



### BD and Sales



# BENGALURU INTER CITY TALENT MOVEMENT (contd.)

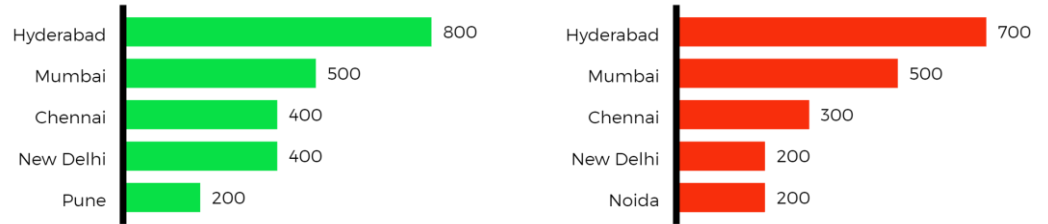
## INTERCITY TALENT EXCHANGED BY TOP FUNCTIONS – LAST 12 MONTHS

### FOCUS FUNCTION

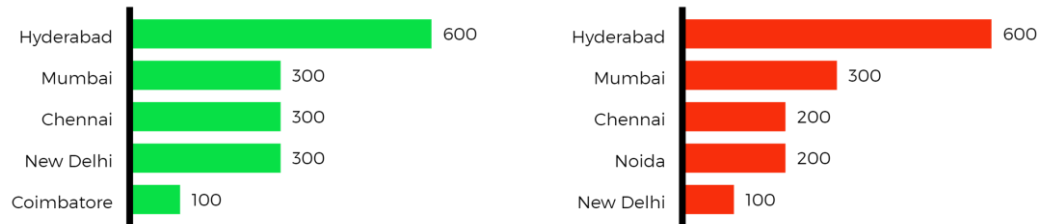
### TALENT GAINED FROM

### TALENT LOST TO

#### Operations



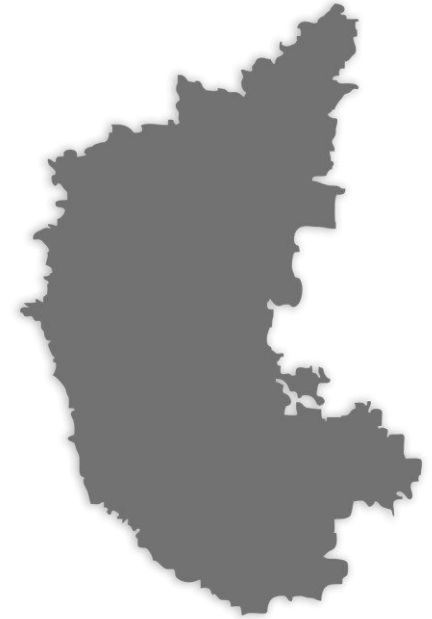
#### Human Resources



SECTION D3

# Talent Movement Corridors

- Industry Sectors
- Enterprise Functions
- **Experience Buckets**



# BENGALURU INTER CITY TALENT MOVEMENT

## INTERCITY TALENT EXCHANGED BY EXPERIENCE LEVELS – LAST 12 MONTHS

### EXPERIENCE BUCKET

### TALENT GAINED FROM

### TALENT LOST TO

#### 1 – 5 Years



#### 5 – 10 Years



#### 10 – 15 Years



# BENGALURU INTER CITY TALENT MOVEMENT

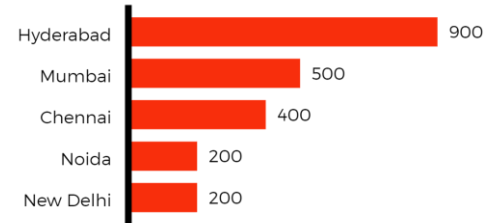
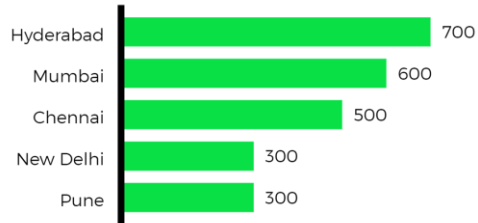
## INTERCITY TALENT EXCHANGED BY EXPERIENCE LEVELS – LAST 12 MONTHS

### EXPERIENCE BUCKET

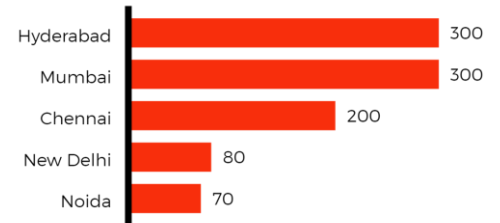
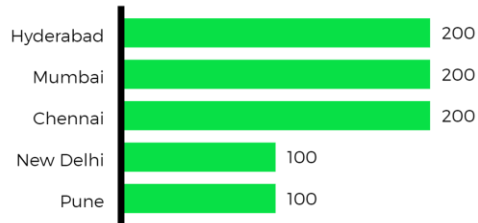
### TALENT GAINED FROM

### TALENT LOST TO

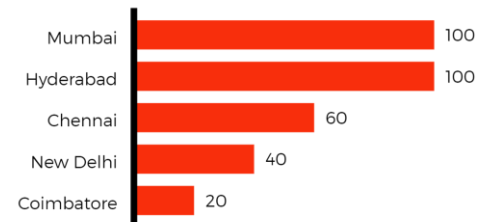
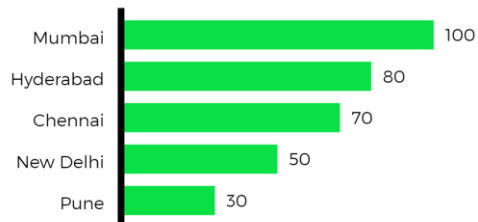
#### 15 – 20 Years



#### 20 – 25 Years



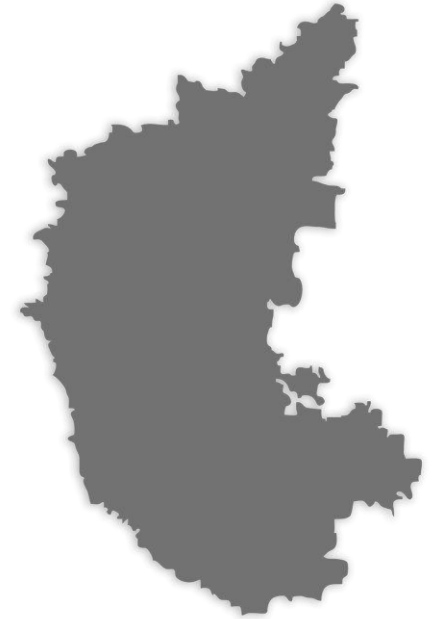
#### 25+ Years



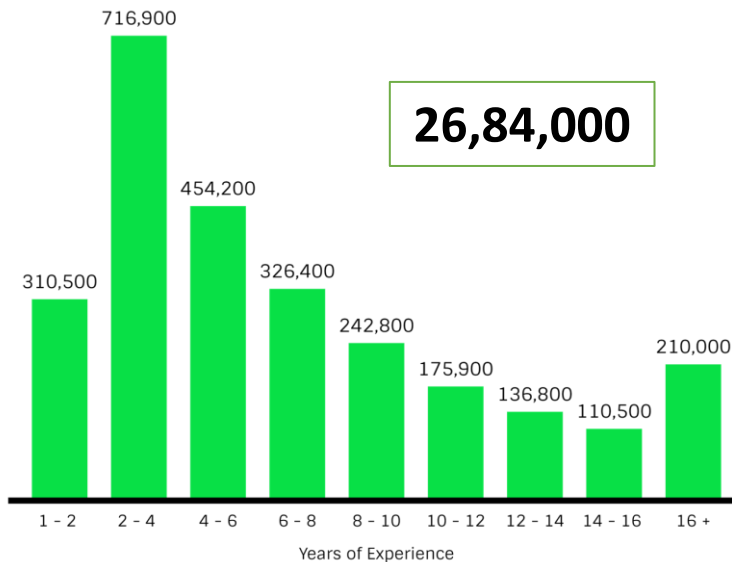
SECTION E

# Talent Desirability

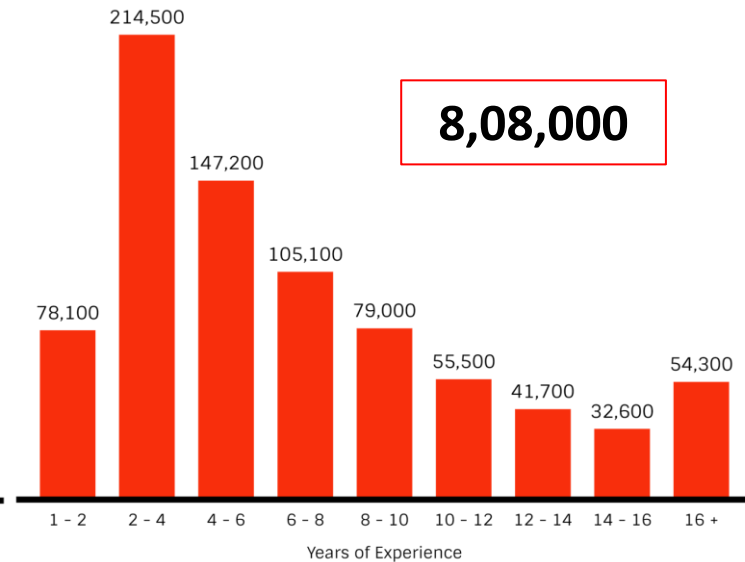
Jobseeker preferences for Karnataka



### Inbound Jobseekers (From Other States to Karnataka)



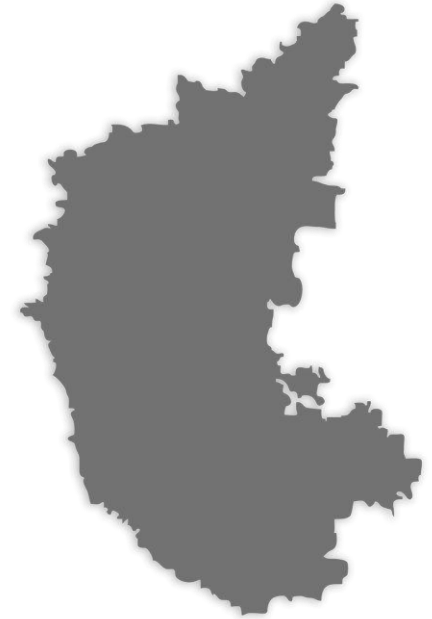
### Outbound Jobseekers (From Karnataka to Other States)



**Karnataka has a strong line up of white-collar talent stating preference to move into the state.** The volume of inbound jobseekers is more than 3x the count of outbound jobseekers. This signals desirability for the state & its ability to have a higher retention of talent.

# Karnataka GCCs

## Talent Summary



Karnataka GCCs – Key statistics	June 2025
Accessible White-collar workforce (KA)	68.70 Lakh
White-collar talent with minimum work experience (KA)	41.1 Lakh
Karnataka GCC white-collar talent	7.5 Lakh
Female : Male ratio in GCC workforce	37 : 63
IT / ITes GCCs Talent pool – #1 of Top 5 Sectors	3.8 Lakh
Non-tech Sector – GCC Talent pool	3.7 Lakh
Engineering & IT Function – GCC Talent pool	3.77 Lakh
Top 3 Non-tech Functions – GCC Talent pool	1.28 Lakh
GCC Talent Pool with Bachelor's Degree	4.23 Lakh
GCC Talent Pool with Master's Degree	1.65 Lakh
GCC Talent Pool with MBA	1.07 Lakh
GCC Talent absorption from other states – 12 months	32.8 K
GCC Talent lost to other states – 12 months	14 K
Net Talent Balance – GCCs Karnataka	18.8 K
Talent Balance Status – GCCs Karnataka	<b>PTB</b>
Rank among Positive Talent Balance States of India – GCCs	1

# Karnataka GCCs

## The Specialist Talent Advantage

June 2025

A Workforce Research release by

**Xpheno**  
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