

T+ve

A Talent Positive Telangana

October 2024



An **Xpheno** Research release

Desirability Quotient & Talent Brand

As Talent Specialists, Xpheno works with Indian and Multinational enterprises to attract and acquire skilled and readily available talent. In the Talent Acquisition process, there are multiple talent frictions that come into play. Among other friction parameters, **Desirability Quotient (DQ)** of the opportunity in offering is key. DQ is driven by demographics of the role in offering and this includes the Talent Brand of & Attraction for the geography being hired for. The **Talent Brand** of a geography, as a collective of experiences & perceptions, is driven by geographic, social, political, cultural and economic factors of the location.

Countries, States and Cities focus on creating and enhancing their DQ through infrastructure, policies and incentives. Perception building as a talent-friendly & business-friendly ecosystem is an important agenda in play. Creating a Talent Brand is key to not just attract migrant talent but also to retain local talent to create a sustainable talent ecosystem. The DQ & Talent Brand are deeply interlinked and impact the ability of a geography to attract investments and enterprises to boost economic activities and create jobs.

Xpheno's framework of 'Talent Balance'

Countries, States and Cities are engaged in a perennial **Competition for Talent** to power their economic engines. Talent in the form of trained and readily deployable manpower is an asset they compete for.

Skilled talent is permanently in churn and transition, as they get exchanged within and between geographies. Outbound and inbound movements of talent are constantly and simultaneously in play. With the 2-way exchange of talent, the net difference between inbound and outbound talent defines if a Country, State or City is **Net Talent Positive or Net Talent Negative**.

Akin to the Trade Balance that economies compute and monitor as a growth parameter, we believe **Talent Balance is a critical human capital parameter** to monitor.

The 2-way movement of talent in a geography creates combinations where the volume of talent lost can be higher than talent gained, or vice versa. A **Positive Talent Balance (PTB)** emerges when a City, State or Country attracts & retains more talent, than what is lost to a competing geography in a specific period. **Negative Talent Balance (NTB)** occurs when the volume of talent lost exceeds that of talent gained in a specific period.

PTB is a highly desirable status that impacts the economic progress of a location. Needless to say, a long-term NTB is not a desirable state for a location to be in. With PTB and NTB as two ends of the Talent Balance scale, cycles of movement occur where a location can swing from a talent positive status to a talent negative status.

This 2nd Edition of **Xpheno's Annual Study of Indian States for Talent Corridors and Talent Exchange Patterns** presents an observation and appreciation of **Telangana as a Talent Positive state**. The report presents the Talent Landscape of Telangana as seen and experienced from a Talent Acquisition and Recruiter's POV.

We are glad to present this research output of ours and Congratulate Telangana on sustaining its position as a Talent Positive state of India.

Kamal Karanth
Co-founder, Xpheno

Anil Ethanur
Co-founder, Xpheno

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EXECUTIVE SUMMARY



Telangana has had a remarkable decade since formation and garnered a track record of achievements for the State and its people to Celebrate. World-class infrastructure clubbed with business-friendly policies and commercial incentives await domestic and global enterprises entering the State. Telangana's emergence as a competitive talent hub and attractive talent brand of the South is a shot in the arm for the State on its Growth Mission.

We, at Xpheno, carried out our second edition of **Annual Study of Indian states for Talent Corridors and Talent Exchange Patterns** for the 12-month period ending September 2024. Telangana retained a special focus in the study & this report that highlights cornerstones as follows:

- 9 Indian states emerged as Talent Positive states or states with Positive Talent Balance (PTB).

- Telangana continued as the third Indian state with Positive Talent Balance, behind Karnataka and Haryana on the top.

- With **61,600** white-collar talent absorptions and **41,400** talent lost during the 12-month period, Telangana clocked a **PTB of 20200** for the study period.

- Telangana joined the league of older peers like Karnataka with PTB of 64,200 and Haryana with PTB of 22,200.

- Telangana holds a wide lead ahead of the remaining 6 states including Gujarat and Maharashtra. The other states like Arunachal Pradesh, Goa, Jammu & Kashmir (UT), Meghalaya and Tripura are a cohort of relatively smaller states and union territories with PTB value in low to mid 3-digit values.

- The other end of the ranking with **Talent Negative states or states with Negative Talent Balance (NTB)** has Andhra Pradesh, Tamil Nadu, Madhya Pradesh, West Bengal and Bihar with NTBs between -9,000 and -18,000.

Factors linked to sustained PTB status of Telangana

- Telangana has an active and accessible white-collar talent base of 41.8 Lakh. Talent pool with minimum working experience of 1 Year make 50% of the active pool (20.98 Lakh).

- Hyderabad holds the lion's share of the active experienced talent pool with an 18.7 Lakh count. The collective contribution of other locations like Warangal, Karimnagar, Duggondi, Hanamakonda etc. are a collective 30K count.

- Hyderabad continues to create a mature ecosystem to host large domestic and international enterprise brands from across industries and geographies.

- Tech Sector is the lead employment sector holding 35% (7.54 Lakh) of the active experienced talent pool. The Tech Sector leads rest of the sectors like Business Consulting & Services, BFSI, Pharma, Healthcare with a huge margin.

- In terms of enterprise functions, Engineering function retains the lead with 4.27 Lakh active experienced talent pool. IT follows with 2.43 Lakh and Business Development comes third with 1.72 Lakh.

- 12% of active experienced white-collar talent pool hold qualifications in Computer Science.

- Telangana's academic system continues to produce more qualified women talent than men. Women continue to dominate the annual academic output with representation in the 54% - 56% range.

- On the Engineering & Technical education front, Telangana annually produces around 1 Lakh Engineers.

- Telangana has very strong inbound and outbound talent corridors with all major talent states and their megacities. Andhra Pradesh, Karnataka and Maharashtra remain the top states with strong 2-way talent movements.

- USA emerged the Top overseas corridor for 2-way white-collar talent from and to Telangana.

- A strong talent pull is evident with over 21 Lakh jobseekers, including freshers, from other states stating Telangana as a preference for their next move. Out of the 21 Lakh talent at the doorstep, 11 Lakh are from other megacities. Interestingly 440K active jobseekers from Bangalore have stated a preference for Hyderabad.

Telangana continues to consolidate its competitive position as a leading Talent Brand among Indian states. The State's ability to attract and retain more white-collar talent than what it loses is driving more Global Brands to setup GCCs in the state.

Prasadh M S

Head – Workforce Research, Xpheno

SECTION A

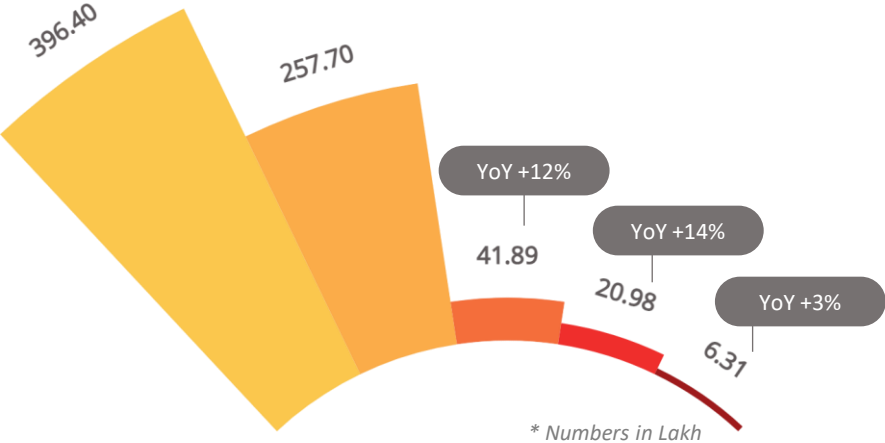
White-collar Talent Landscape

Telangana



TELANGANA ACTIVE TALENT SNAPSHOT

HUMAN CAPITAL SUMMARY



- Total Population
- Working Age Population
- Accessible White Collar Talent
- White Collar with Min. Experience
- Active in Jobmarket

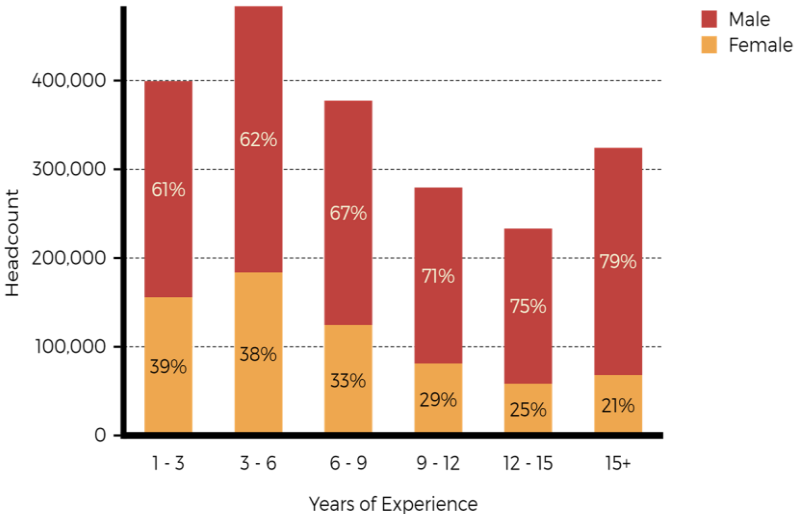
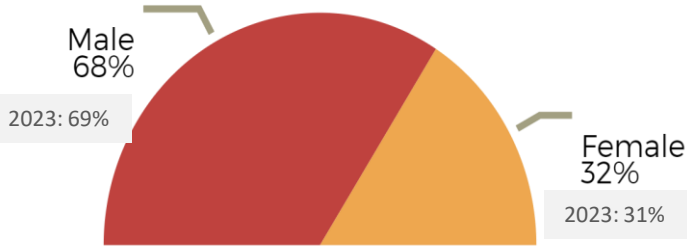
65% of Telangana's population qualify as **Working Age population** of the State.

Telangana has an **active and accessible white-collar talent base of 41.89 Lakh** (YoY growth +12%)

Talent pool with **minimum working experience of 1 Year make 50% of the active pool at 20.98 Lakh** (YoY growth +14%)

TELANGANA WHITE COLLAR TALENT SNAPSHOT

GENDER & EXPERIENCE DISTRIBUTION OF ACCESSIBLE WHITE-COLLAR TALENT



White-collar talent in Telangana holds an experience mix that makes a **broad base of the talent pyramid**. With an **8.8 Lakh** count, talent with experience up to 6 years of experience make 42% of the total talent pool of 20.98 Lakh.

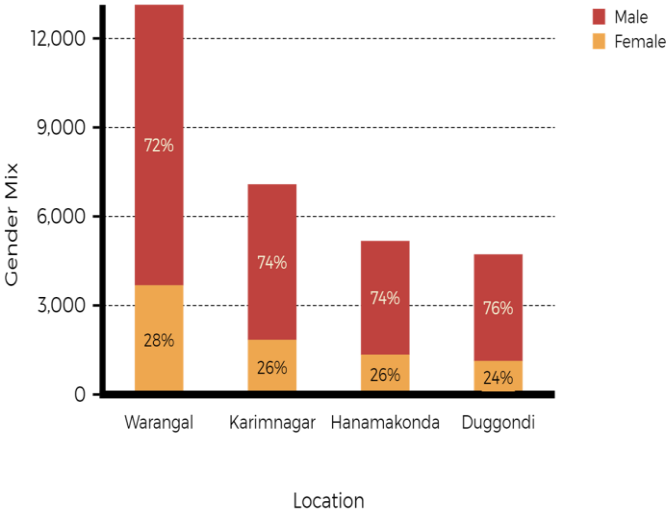
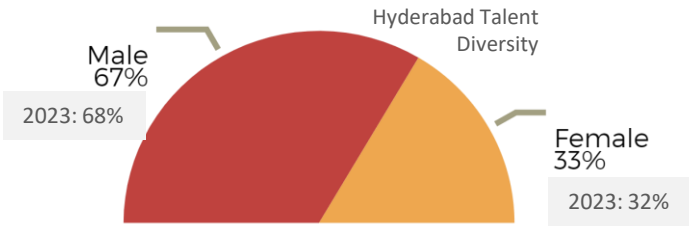
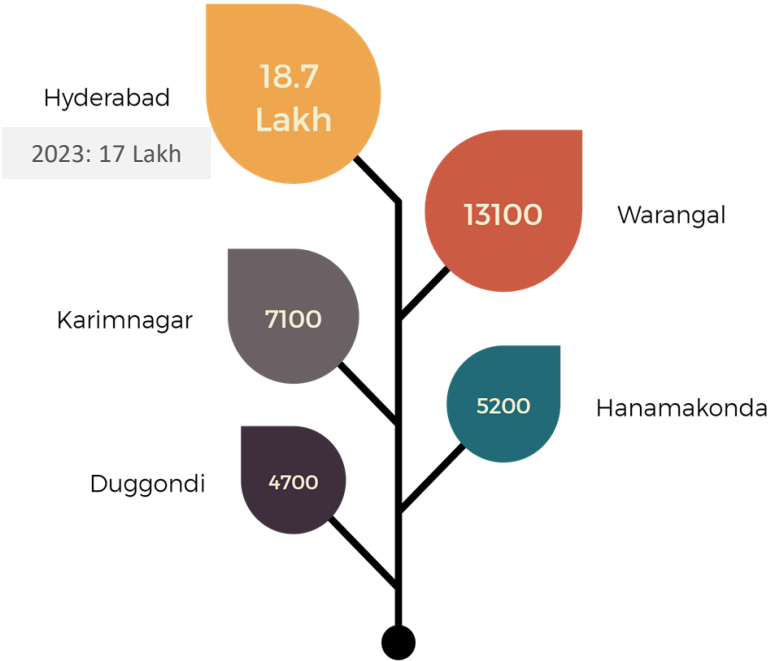
Mid to Mid-senior level talent in the 6 to 12 years of experience range account for 31%. Senior talent in the 12+ years of experience make 27% of the talent pool.

Representation of Women in the active white-collar workforce **grew by 1% point** in 2024 compared to 2023.

Women representation in the active white-collar talent pool decreases steadily with rise in experience level. Women dropping out of active workforce at higher experience levels continues to be an evident trend.

TELANGANA WHITE COLLAR TALENT LOCATIONS

TOP LOCATIONS BY ACCESSIBLE WHITE-COLLAR TALENT VOLUME



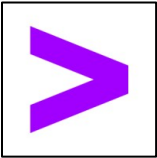
Hyderabad holds the lion's share of the active experienced talent pool with an **18.7 Lakh** count with a **10% growth in size since 2023**.

The top 5 locations for active white-collar talent and their rankings remain unchanged in 2024, compared to 2023.

TELANGANA TOP EMPLOYERS

TOP EMPLOYER BRANDS BY VOLUME OF WHITE-COLLAR TALENT

Top Employers

		
TCS	COGNIZANT	ACCENTURE
		
INFOSYS	DELOITTE	WIPRO
		
TECH MAHINDRA	CAPGEMINI	AMAZON **

Emerging Top Employers

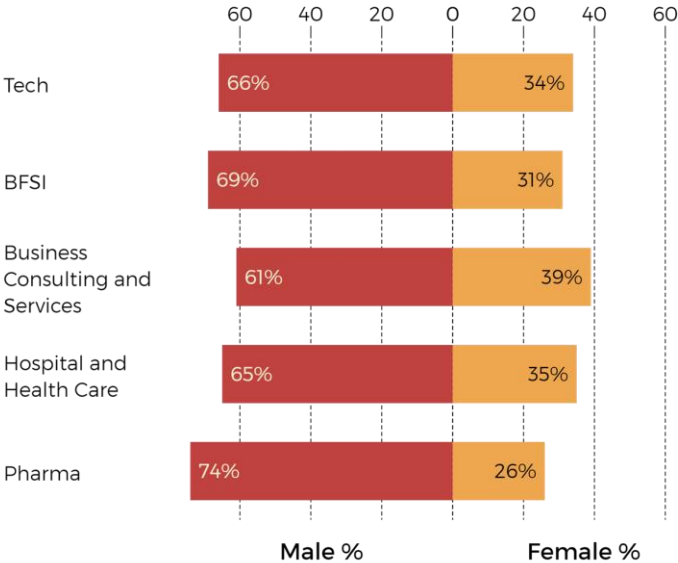
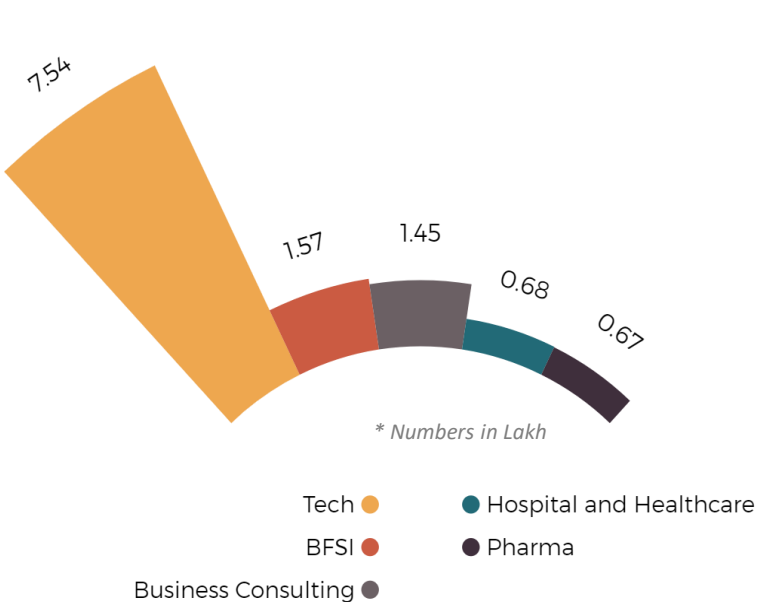
		
WELLS FARGO	MICROSOFT **	ORACLE
		
LTI MINDTREE	SALESFORCE **	HSBC
		
JPMORGAN CHASE **	QUALCOMM	NOVARTIS **

Telangana has emerged a strong contender to host India-bound multinational players from across sectors and geographies. As a GCC Hotspot, Hyderabad continues to attract global bellwethers. The list of Top and Fast-Growing employers of Telangana has new entrants as well change in order based on growth.

** New entrants to list in 2024

TELANGANA WHITE COLLAR TALENT

TOP INDUSTRY GROUPS BY ACCESSIBLE WHITE-COLLAR TALENT VOLUME

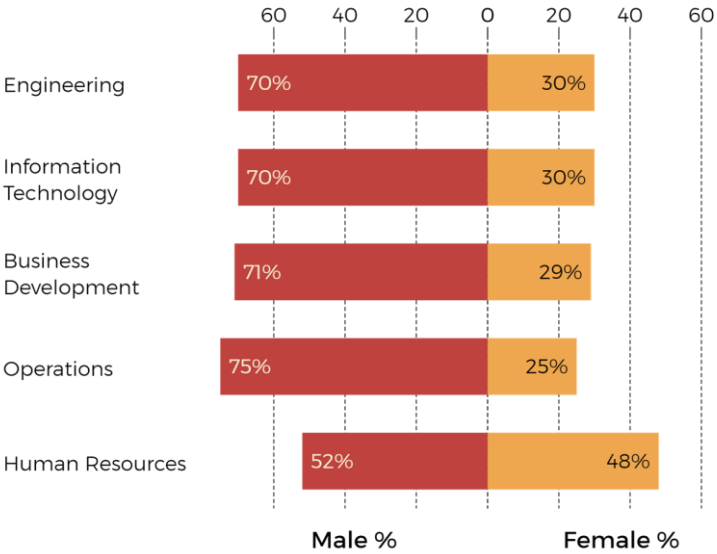
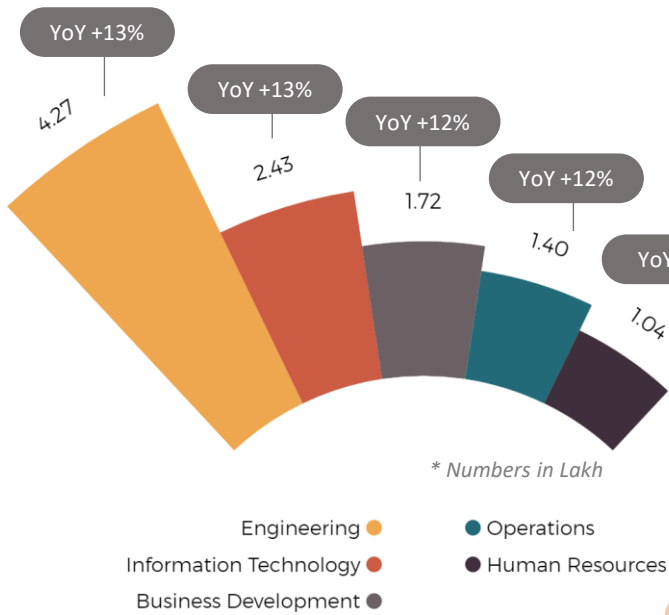


Telangana's Tech Sector is the lead employment sector for active white-collar talent. **More than one-third (7.5 Lakh) of the active experienced talent pool is engaged by the Tech Sector.**

BFSI, Business Consulting, Hospital & Healthcare and Pharma trail behind Tech by huge margins on active talent volumes.

TELANGANA WHITE COLLAR TALENT

TOP ENTERPRISE FUNCTIONS BY ACCESSIBLE WHITE-COLLAR TALENT VOLUME

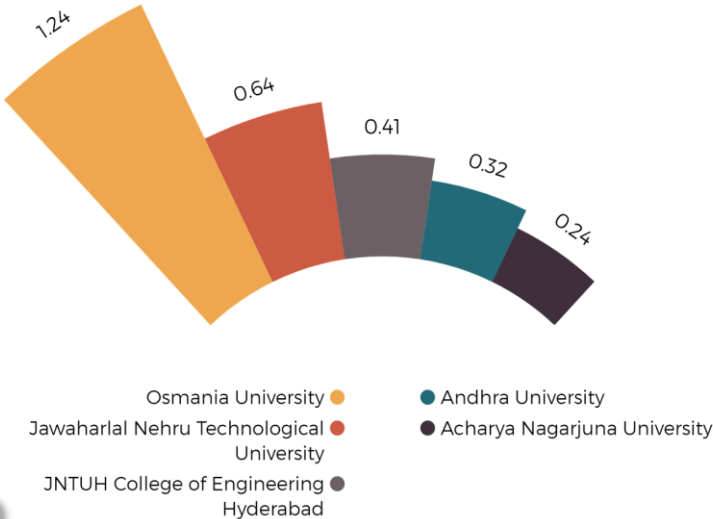
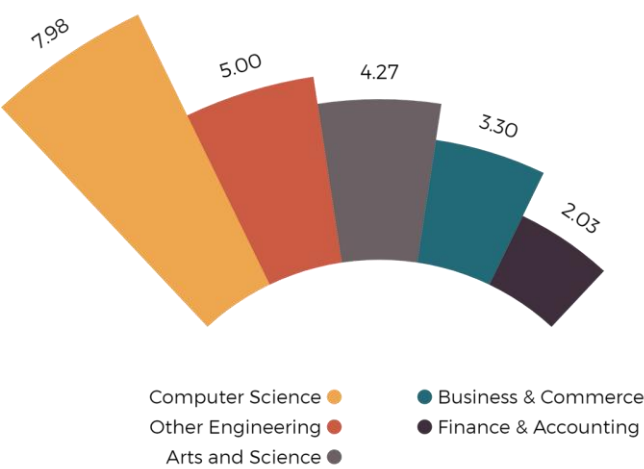
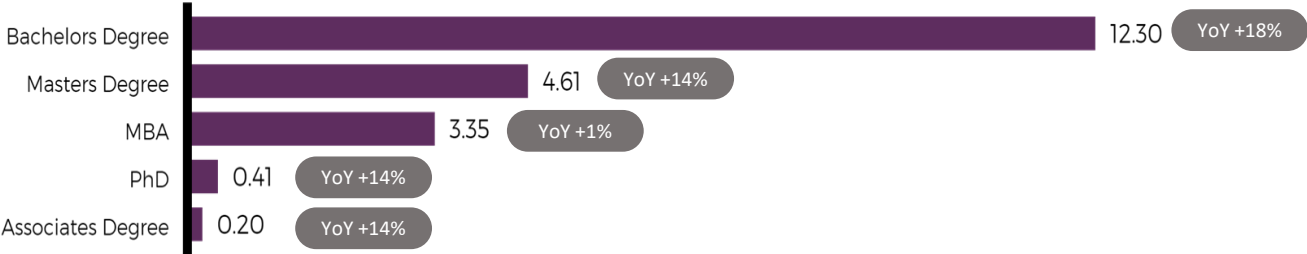


Top 5 Enterprise Functions collectively account for over **52% of active white-collar talent** of Telangana. The Engineering function on the lead with 4.2 Lakh holds one-fifth of the experienced white-collar talent pool. The total of 6.7 Lakh experienced professionals in Engineering & IT functions are drivers of Telangana’s tech identity.

Women participation in 4 out of 5 Top functions has grown between 1% - 4% points in comparison to 2023.

TELANGANA WHITE COLLAR TALENT

DISTRIBUTION BY TOP QUALIFICATIONS, EDUCATION STREAMS & INSTITUTIONS



35% of active experienced white-collar talent pool holds **qualifications in Computer Science and IT.**
22% hold **qualifications in other Engineering streams.**
15% hold **qualifications in Business & Commerce.**

* Numbers in Lakh

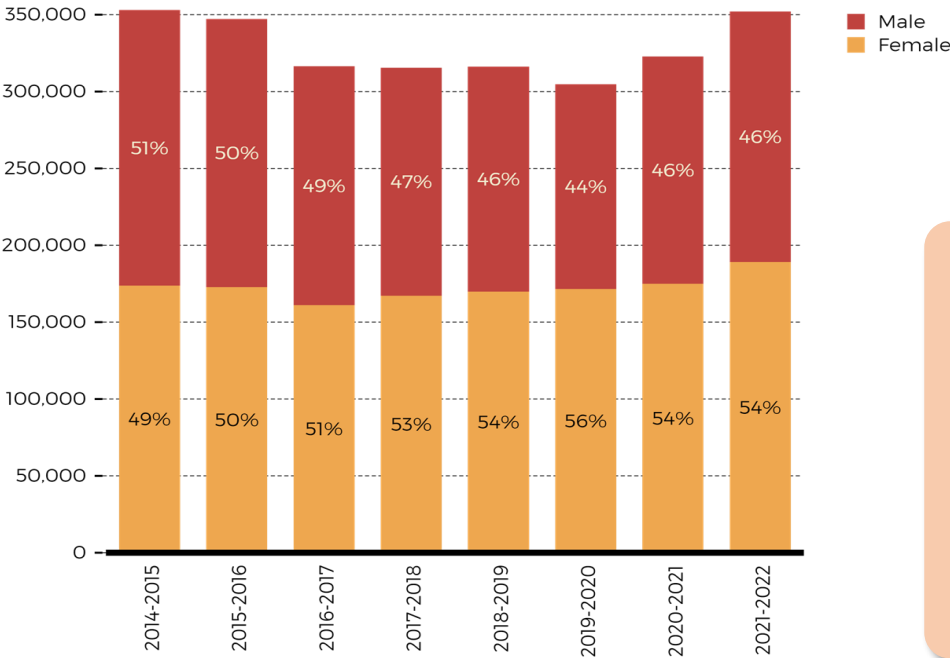
SECTION B

Academic Output Trend Telangana



TELANGANA ACADEMIC OUTPUT

VOLUME & GENDER MIX TREND OF ANNUAL ACADEMIC OUTPUT



Women continue to dominate the annual academic output of Telangana's academic system. **Women talent has been representing 50%+ of total output since 2015-2016.**

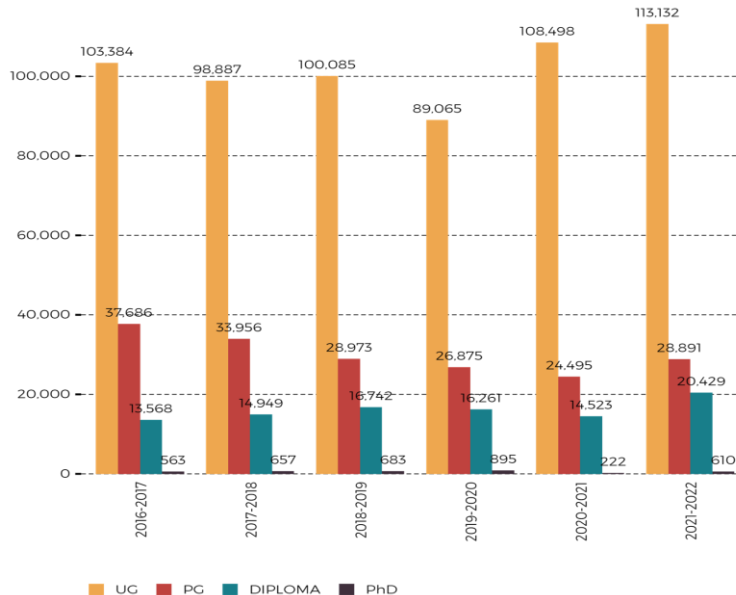
Total annual talent output from higher education institutions has been **hovering in the 3 Lakh range and crossed 3.5 Lakh mark in 2022.**

UG streams have registered a growth of 7% in 2022 versus 2021.

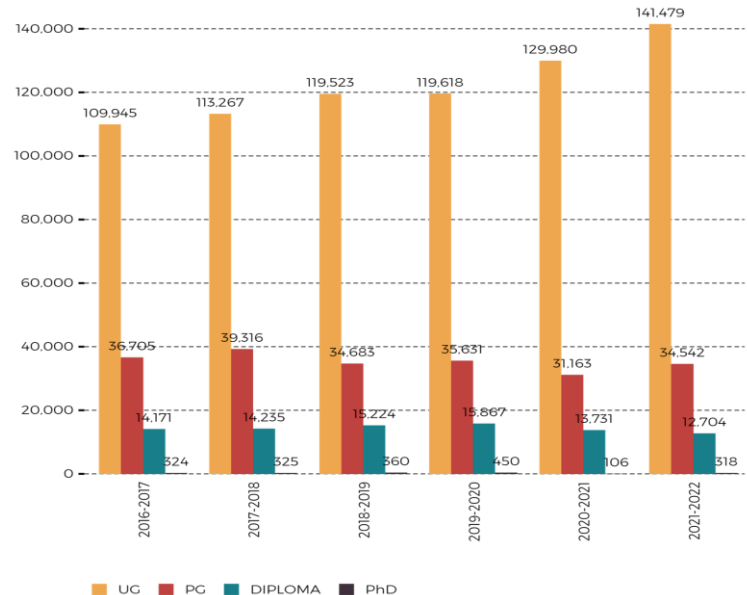
TELANGANA ACADEMIC OUTPUT

QUALIFICATION & GENDER-WISE TREND OF ANNUAL ACADEMIC OUTPUT

Male Talent



Female Talent



Female UG talent output had grown by **9% in 2022 compared to 2021**. Meanwhile **Male UG output grew by 4%** for the same period. Total output across all 4 qualification streams grew by 8% for female talent and male talent output grew by 10%.

SECTION C

Net Talent Balance

Talent Positive & Talent Negative



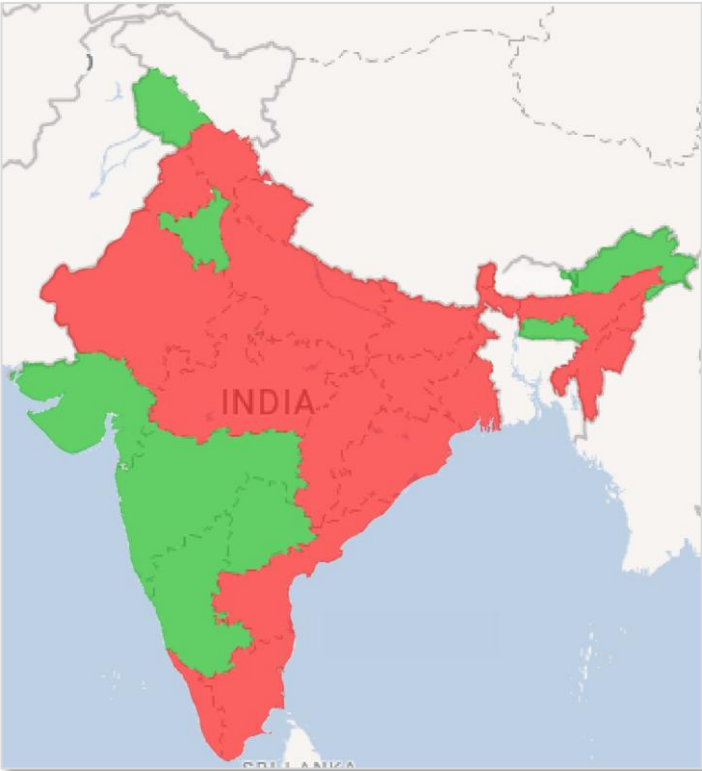
NET TALENT BALANCE – WORKFORCE PARAMETER

TALENT POSITIVE & TALENT NEGATIVE STATUS

TERM	DEFINITION
Talent Corridors	Talent in a geography is dynamic and remains in motion in and out of the geography. The lines of talent connection that a City, State or Country has with another geography 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 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 City, State or Country attracts & retains more talent, than what it loses to a competing geography.
Talent Negative / Negative Talent Balance	A Negative Talent Balance (NTB) occurs when a City, State or Country loses more talent, than what it attracts from a competing geography.
Factors impacting Net Talent Balance	Talent exchanges are primarily driven by economic factors of opportunity and growth. Social, political, cultural, infrastructure and geological
Desired state	PTB is a highly desirable state that impacts the economic progress of a geography. However, a very high PTB for long cycles is also not healthy as it leads to saturation and can impact desirability. Very high and Long-term NTB is not a desirable state for any geography.

INDIA TALENT BALANCE MAP

TALENT POSITIVE AND TALENT NEGATIVE STATES & UNION TERRITORIES



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

The count of Positive Talent Balance states grew from **7 in 2023 to 9 in 2024**.
The **Top 3 states** by PTB value are **Karnataka, Haryana and Telangana**.

PTB - Positive Talent Balance | **NTB** – Negative Talent Balance
: Changed from PTB to NTB since 2023
** : Changed from NTB to PTB since 2023

SECTION D1

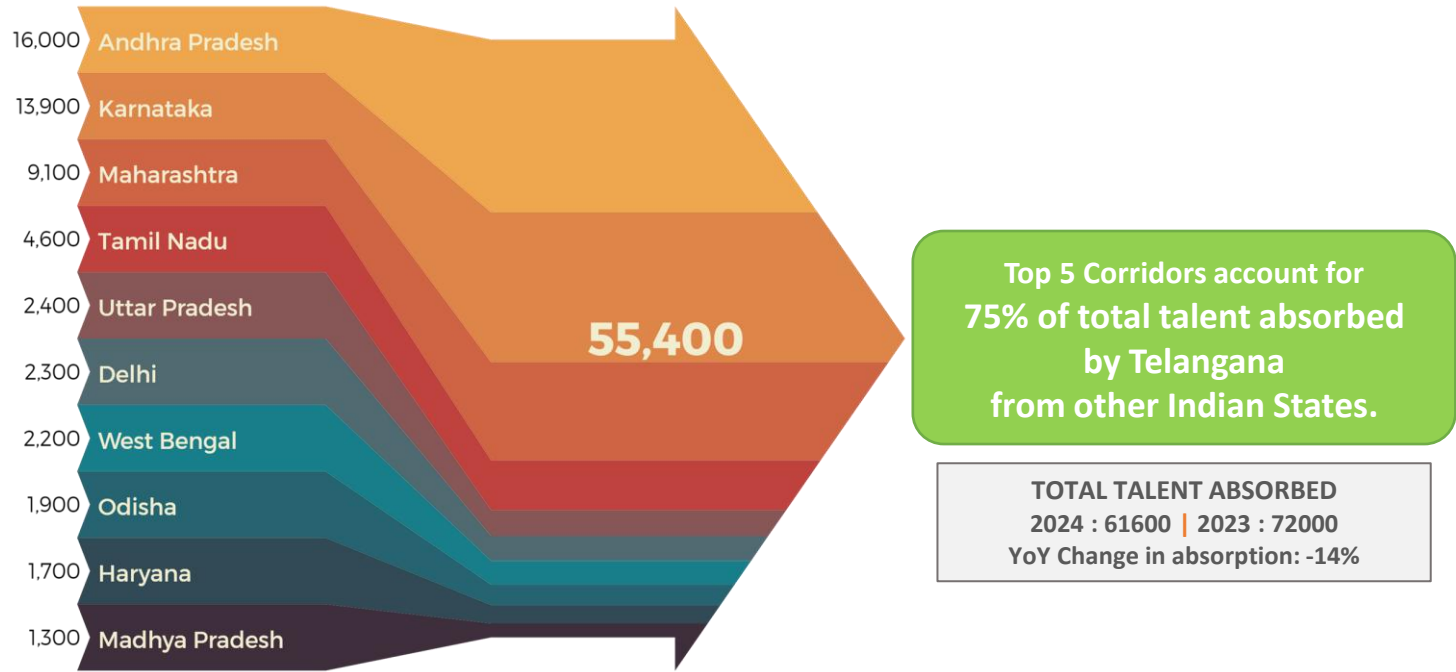
Talent Movement Corridors

- **Telangana State**
- Hyderabad City
- Industry Sectors
- Enterprise Functions
- Experience Buckets



TELANGANA WHITE-COLLAR TALENT MOVEMENT CORRIDORS

ABSORPTION OF TALENT FROM OTHER INDIAN STATES – LAST 12 MONTHS

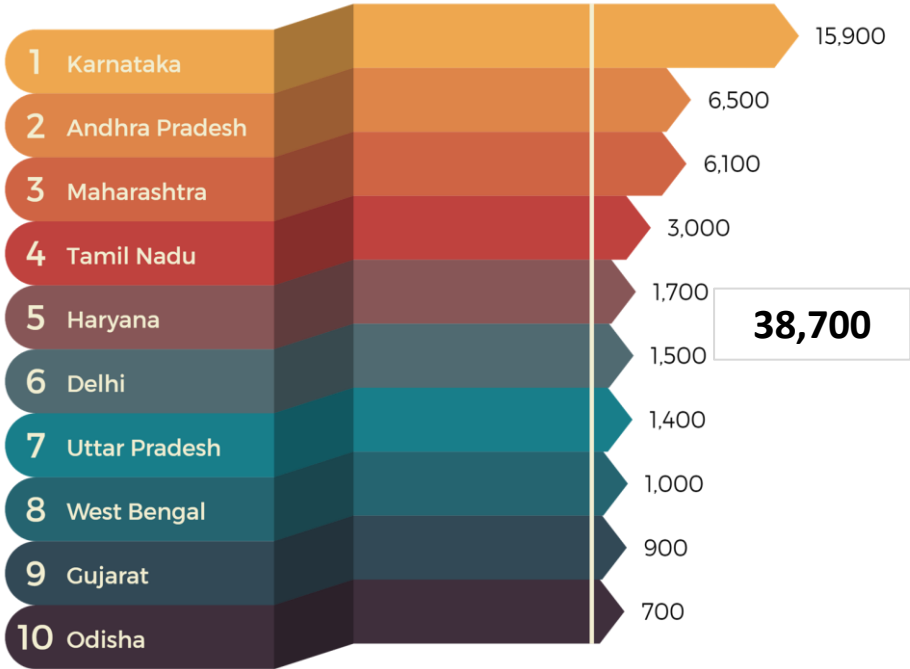


TELANGANA WHITE-COLLAR TALENT MOVEMENT CORRIDORS

LOSS OF TALENT TO OTHER INDIAN STATES – LAST 12 MONTHS

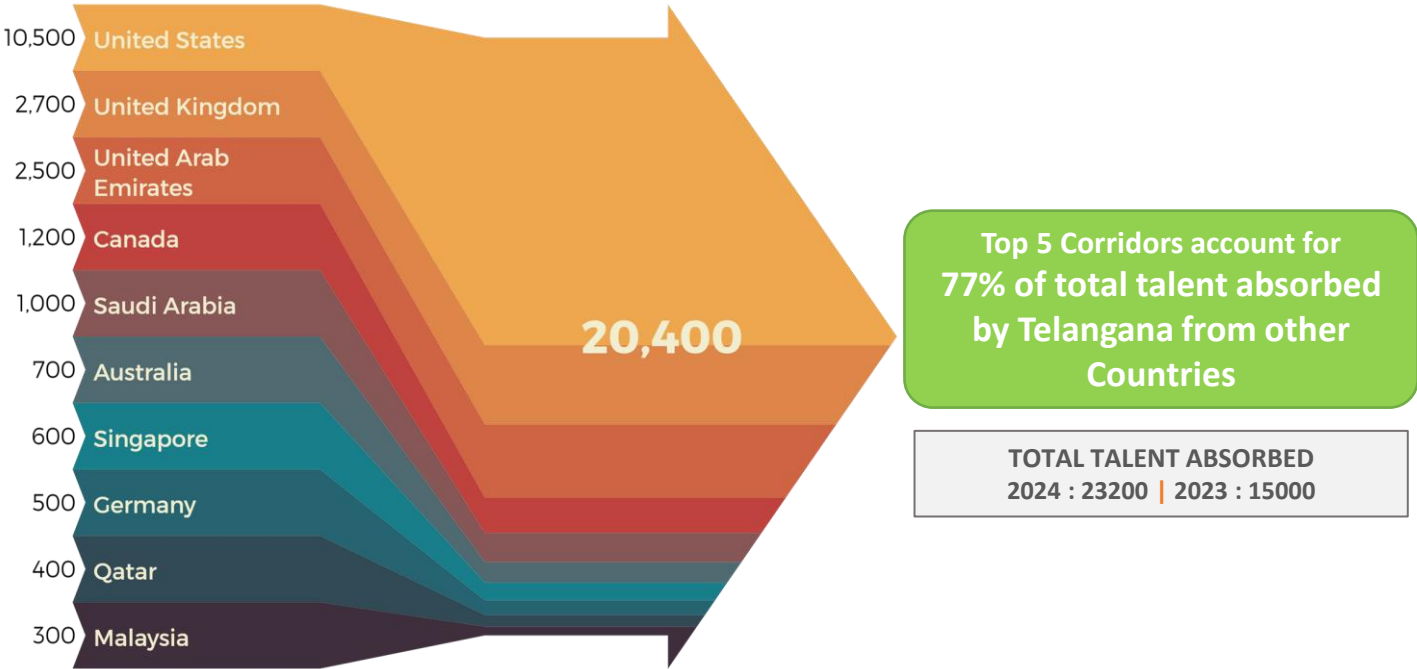
Top 5 Corridors account for
80% of total talent lost by
Telangana to other Indian
States

TOTAL TALENT LOST
2024 : 41400 | 2023 : 66000
YoY Change in talent loss: -37%



TELANGANA WHITE-COLLAR TALENT MOVEMENT CORRIDORS

ABSORPTION OF TALENT FROM OTHER COUNTRIES – LAST 12 MONTHS

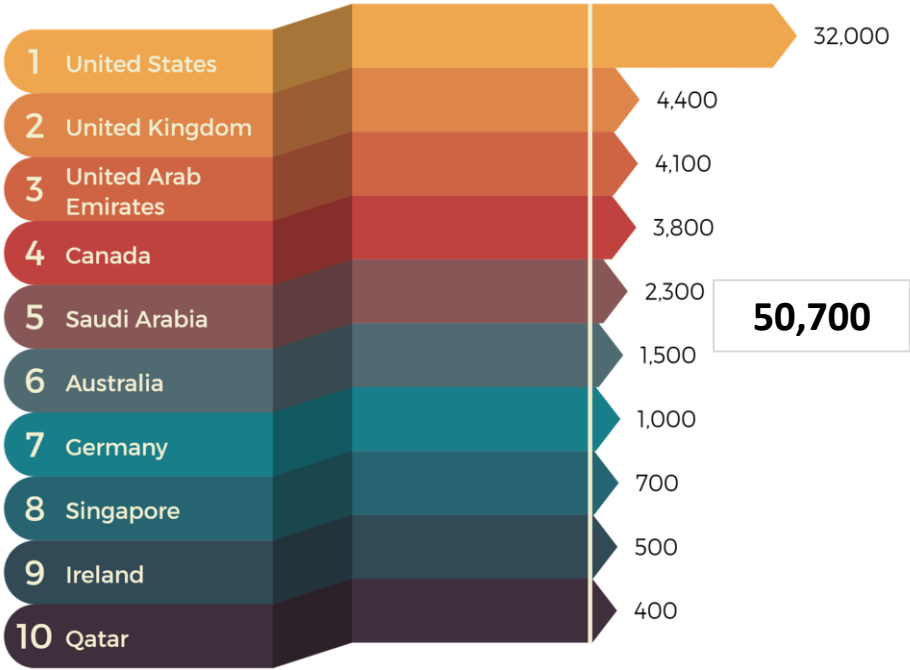


TELANGANA WHITE-COLLAR TALENT MOVEMENT CORRIDORS

LOSS OF TALENT TO OTHER COUNTRIES – LAST 12 MONTHS

Top 5 Corridors account for
85% of total talent lost by
Telangana to other Countries

TOTAL TALENT LOST
2024 : 55000 | 2023 : 49000



SECTION D2

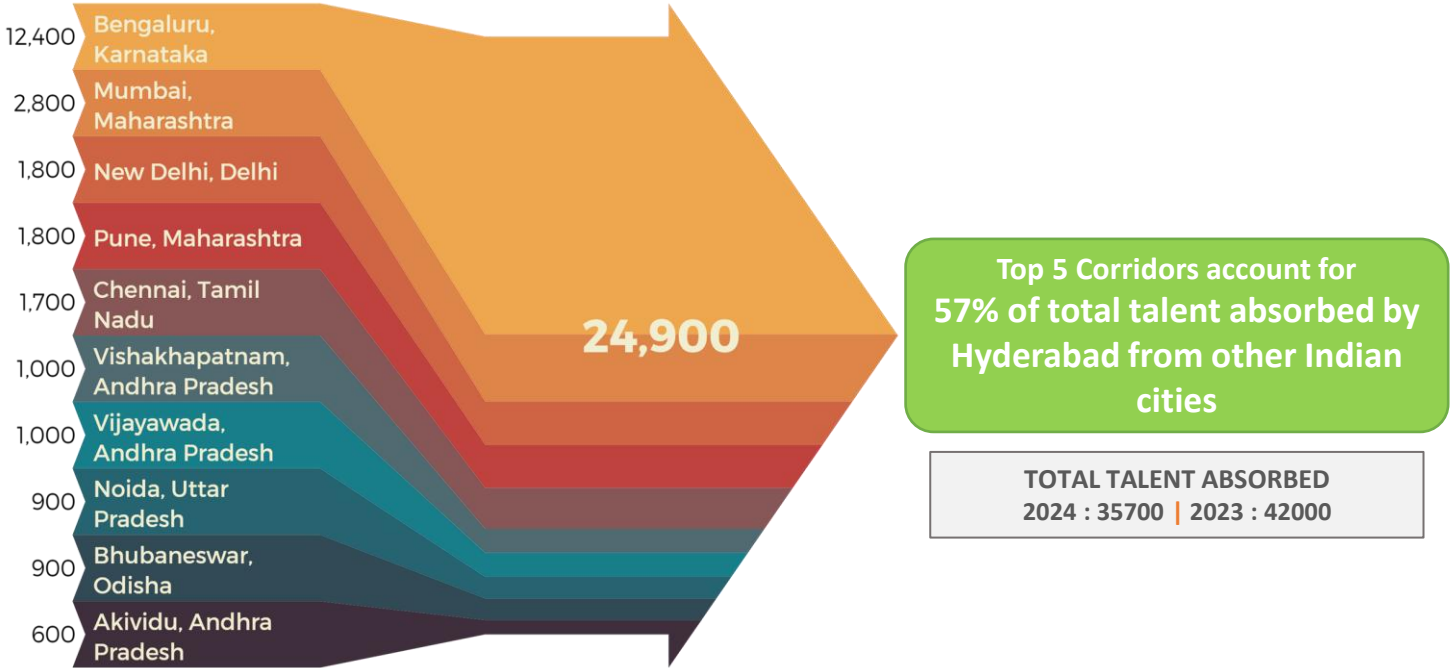
Talent Movement Corridors

- Telangana State
- **Hyderabad City**
- Industry Sectors
- Enterprise Functions
- Experience Buckets



HYDERABAD WHITE-COLLAR TALENT MOVEMENT CORRIDORS

ABSORPTION OF TALENT FROM OTHER INDIAN CITIES – LAST 12 MONTHS

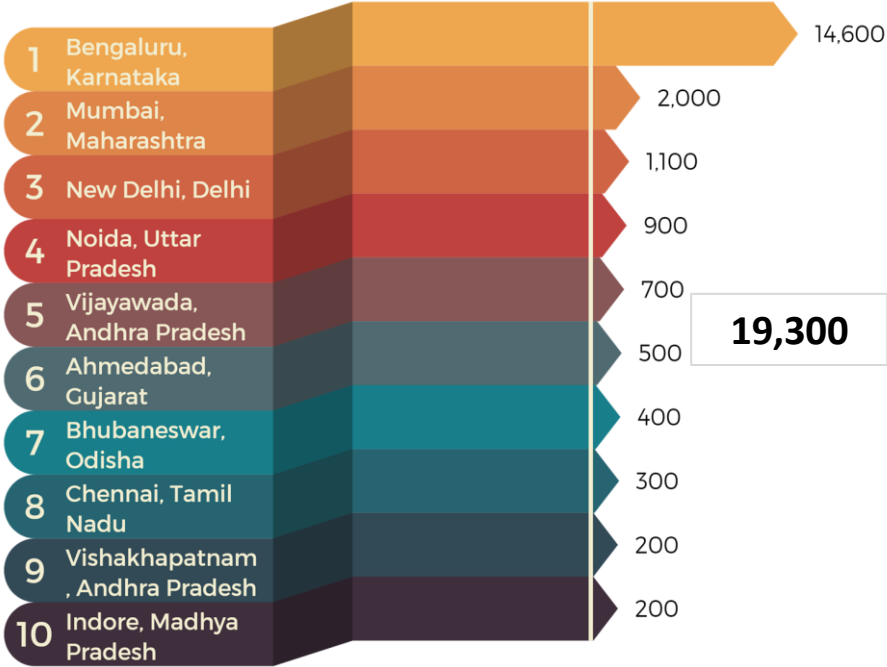


HYDERABAD WHITE-COLLAR TALENT MOVEMENT CORRIDORS

LOSS OF TALENT TO OTHER INDIAN CITIES – LAST 12 MONTHS

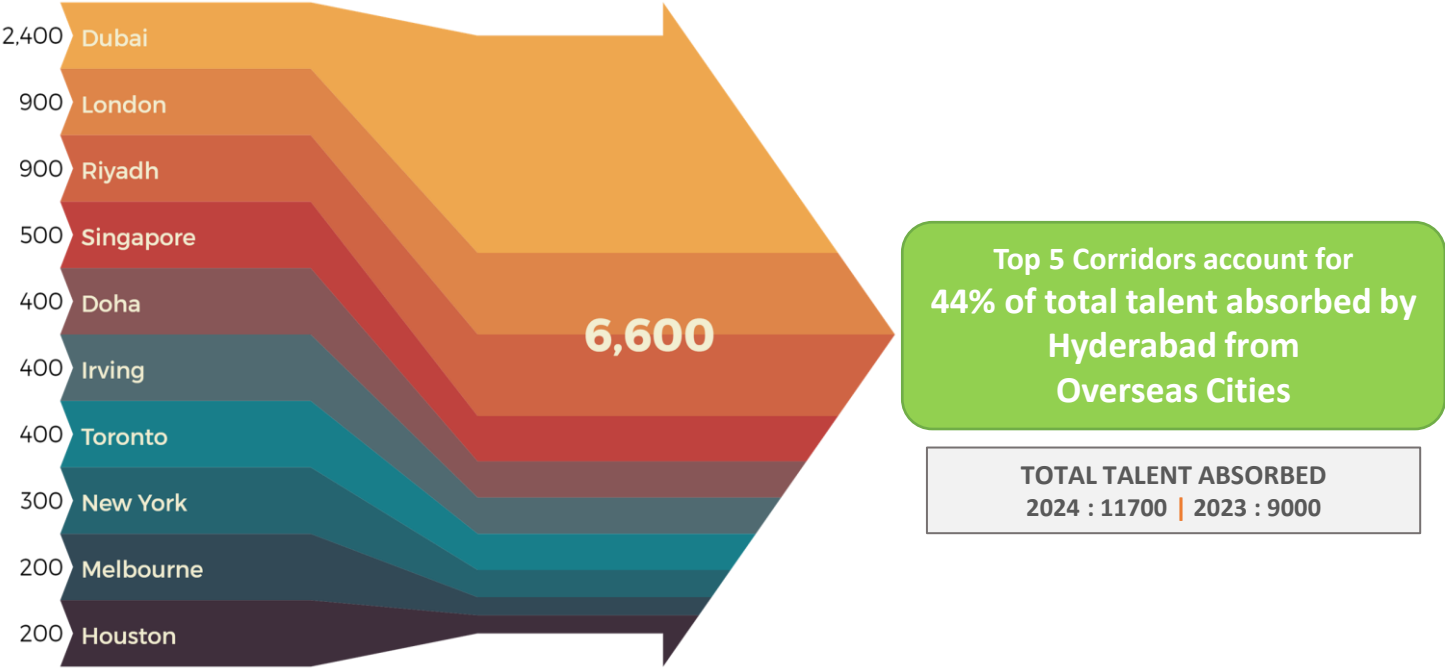
Top 5 Corridors account for
80% of total talent lost by
Hyderabad to other Indian Cities

TOTAL TALENT LOST
2024 : 24200 | 2023 : 34000



HYDERABAD WHITE-COLLAR TALENT MOVEMENT CORRIDORS

ABSORPTION OF TALENT FROM OVERSEAS CITIES – LAST 12 MONTHS

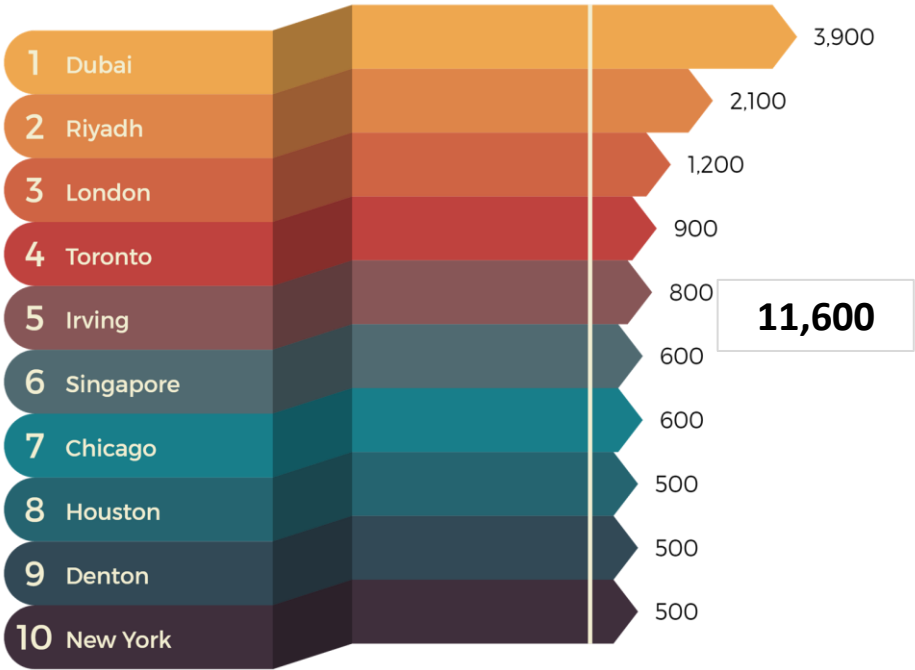


HYDERABAD WHITE-COLLAR TALENT MOVEMENT CORRIDORS

LOSS OF TALENT TO OVERSEAS CITIES – LAST 12 MONTHS

Top 5 Corridors account for
37% of total talent lost by
Hyderabad to Overseas Cities

TOTAL TALENT LOST
2024 : 24300 | 2023 : 24000



SECTION D3

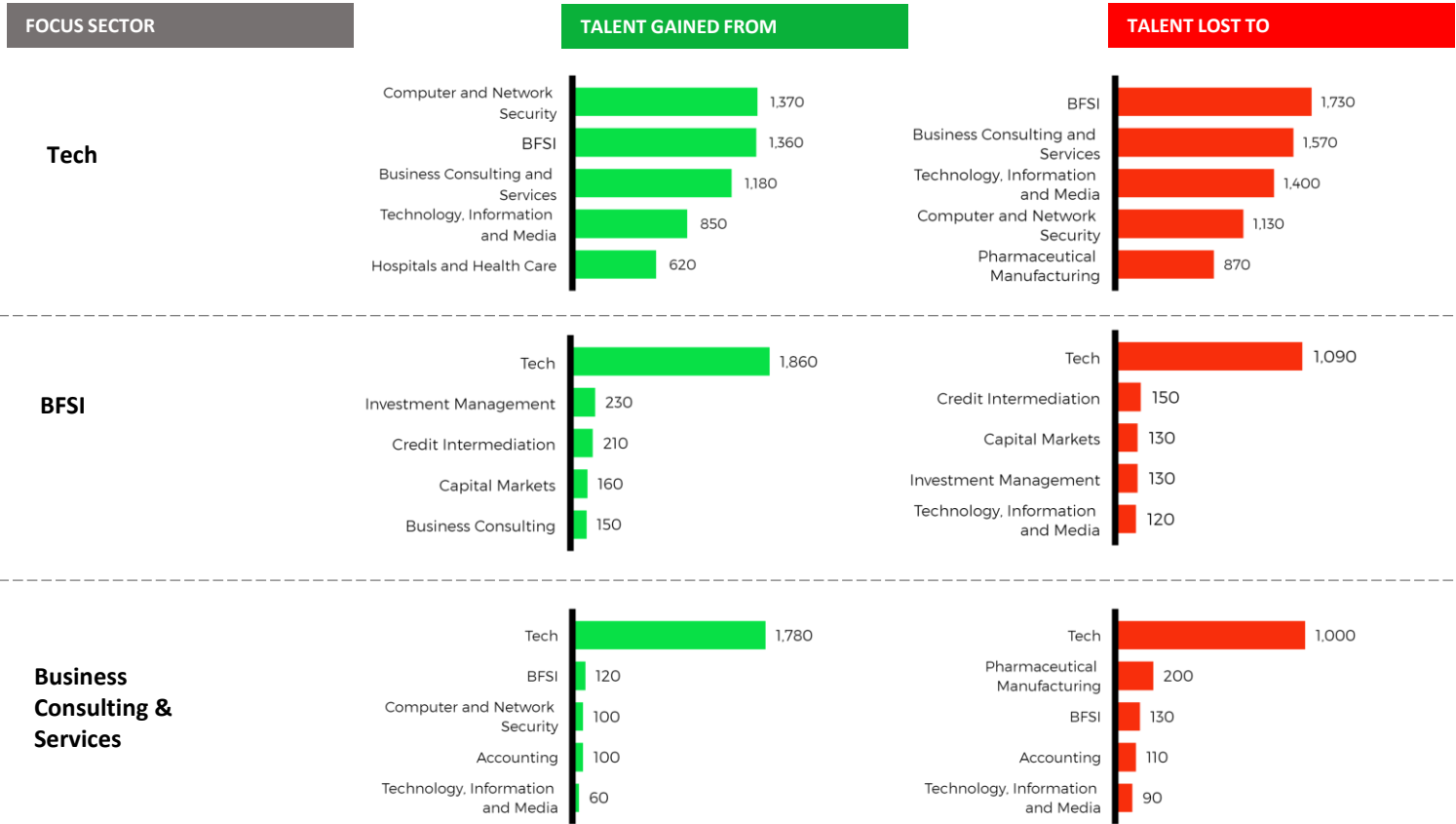
Talent Movement Corridors

- Telangana State
- Hyderabad City
- **Industry Sectors**
- Enterprise Functions
- Experience Buckets



TELANGANA INTER SECTOR TALENT MOVEMENT

INTRASTATE TALENT EXCHANGED BETWEEN TOP INDUSTRY SECTORS – LAST 12 MONTHS



TELANGANA INTER SECTOR TALENT MOVEMENT

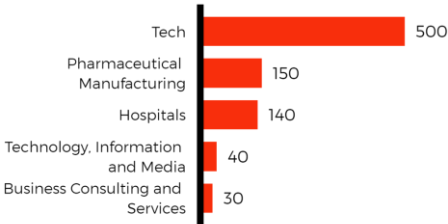
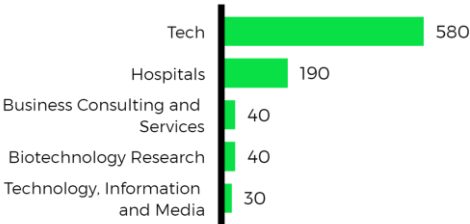
INTRASTATE TALENT EXCHANGED BETWEEN TOP INDUSTRY SECTORS – LAST 12 MONTHS

FOCUS SECTOR

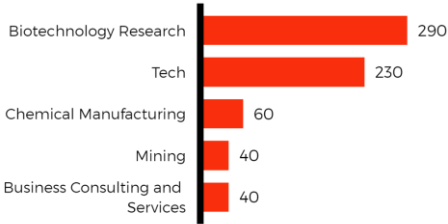
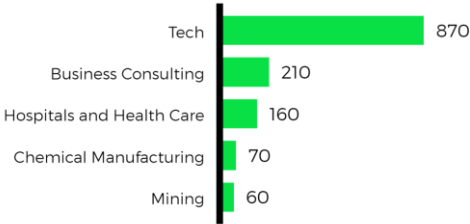
TALENT GAINED FROM

TALENT LOST TO

Hospitals and
Healthcare

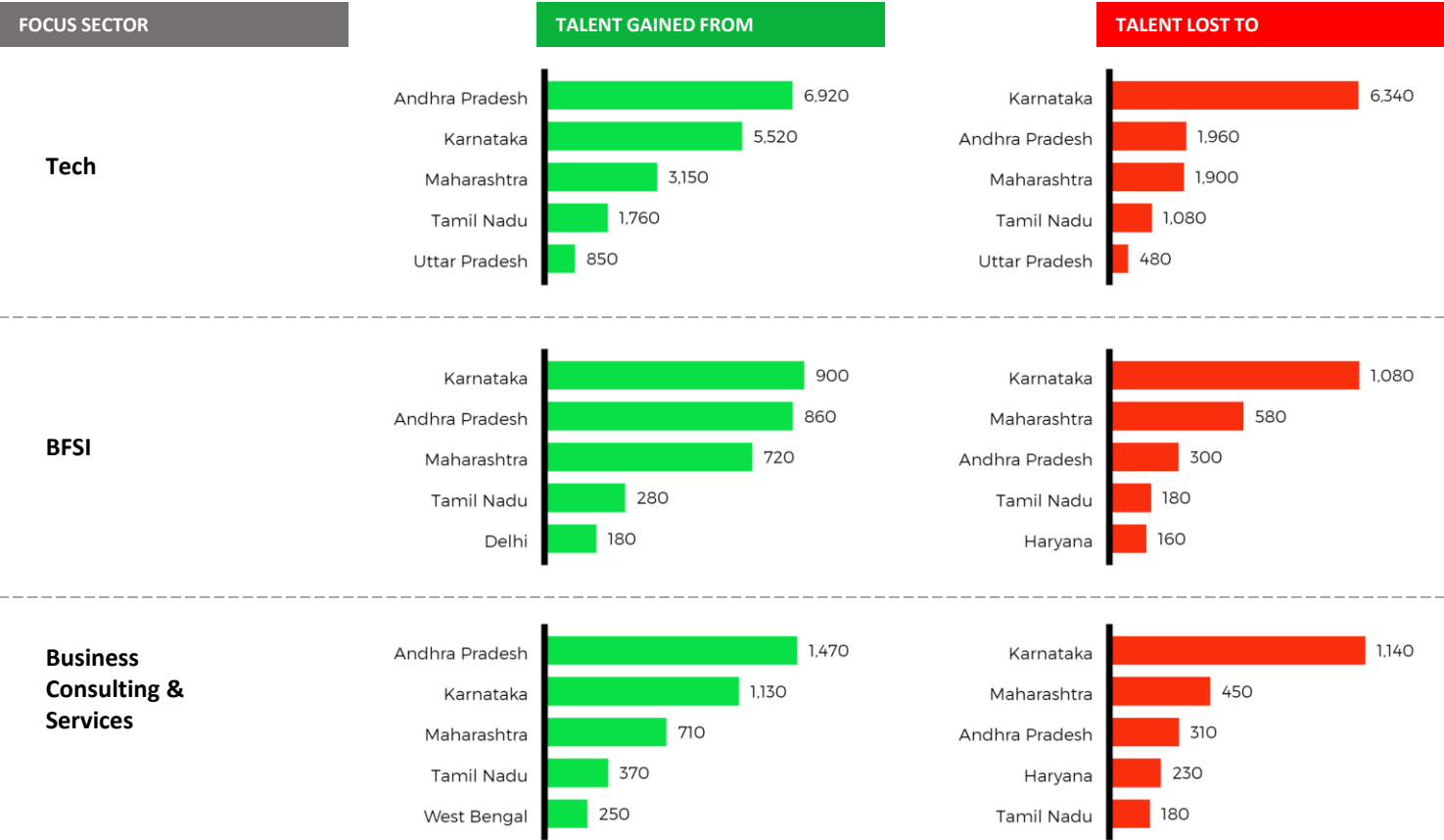


Pharma



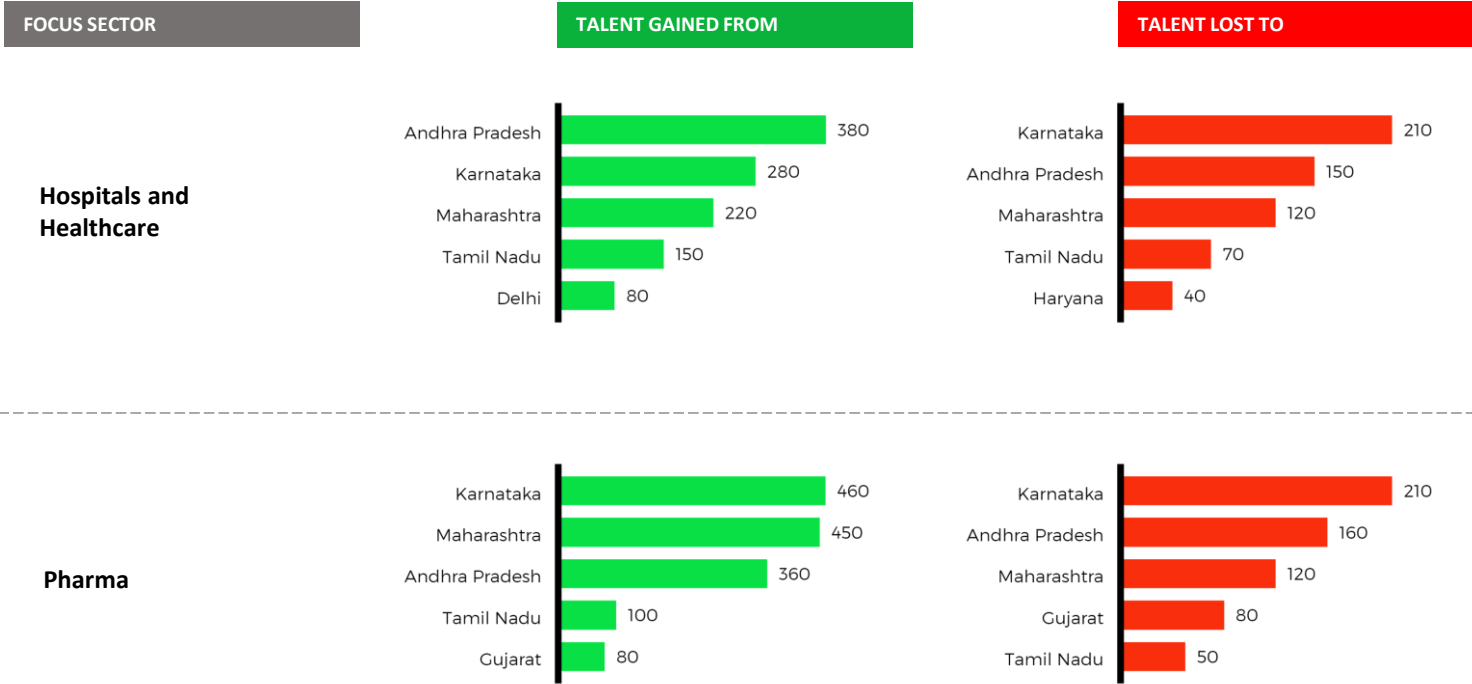
TELANGANA INTER STATE TALENT MOVEMENT

INTERSTATE TALENT EXCHANGED BY TOP INDUSTRY SECTORS – LAST 12 MONTHS



TELANGANA INTER STATE TALENT MOVEMENT

INTERSTATE TALENT EXCHANGED BY TOP INDUSTRY SECTORS – LAST 12 MONTHS



SECTION D4

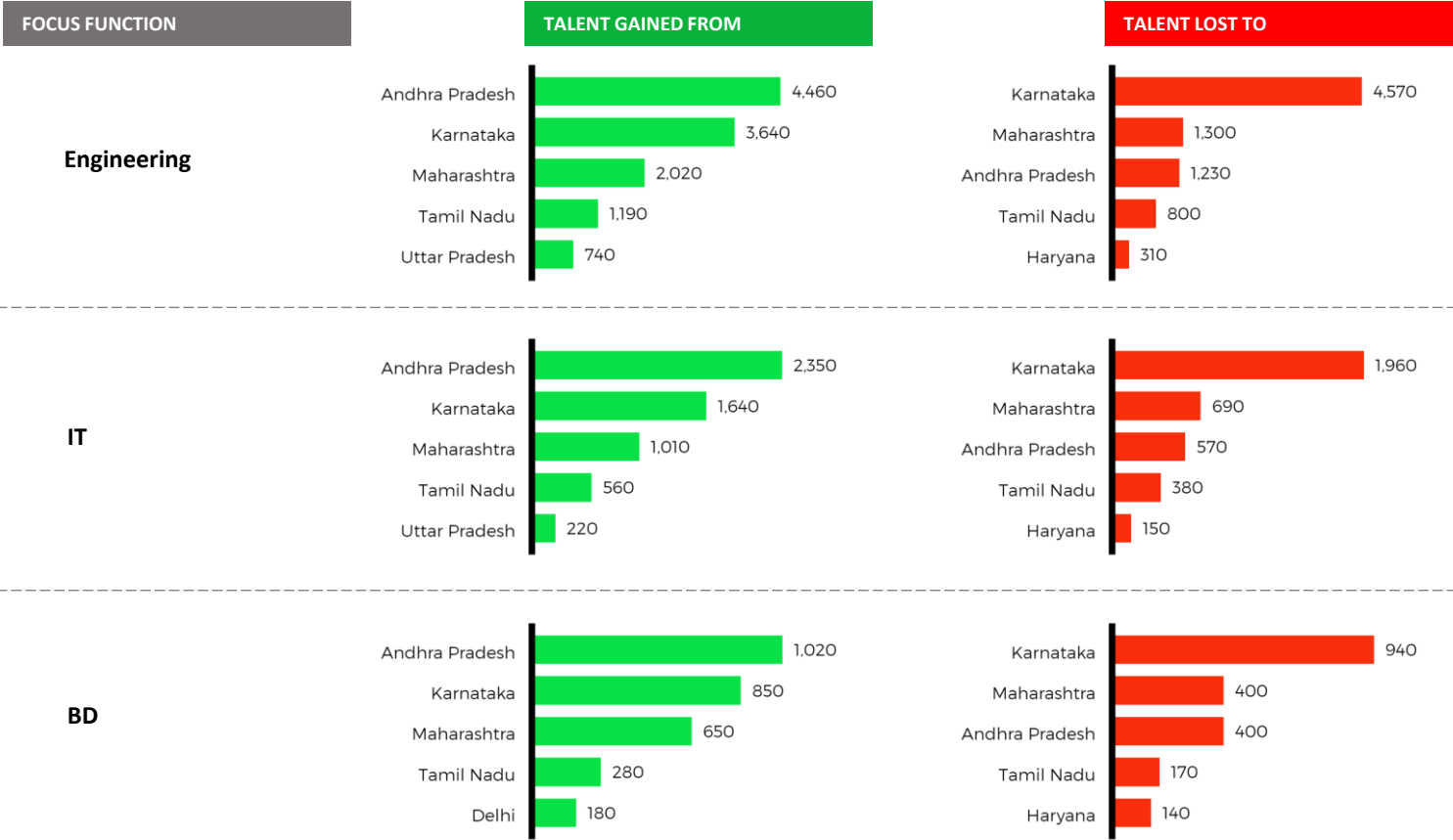
Talent Movement Corridors

- Telangana State
- Hyderabad City
- Industry Sectors
- **Enterprise Functions**
- Experience Buckets



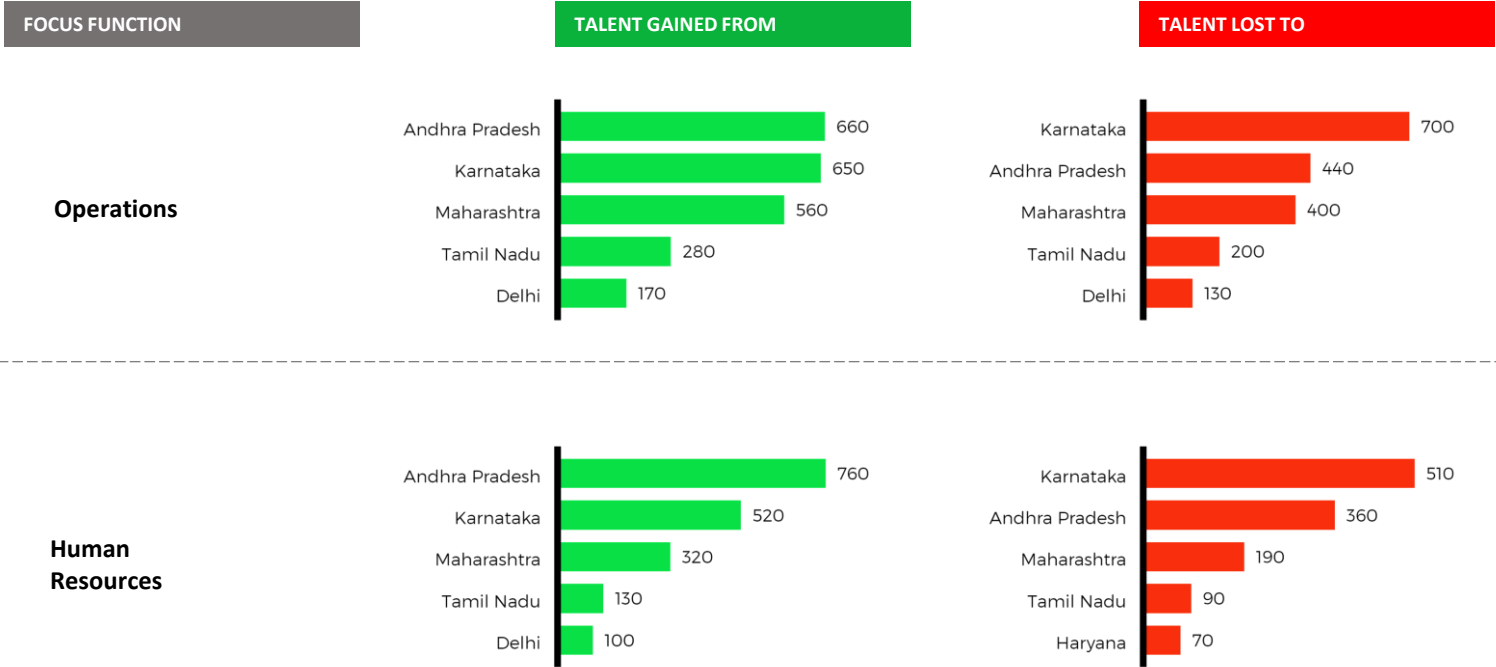
TELANGANA INTER STATE TALENT MOVEMENT

INTERSTATE TALENT EXCHANGED BY TOP ENTERPRISE FUNCTIONS – LAST 12 MONTHS



TELANGANA INTER STATE TALENT MOVEMENT (contd.)

INTERSTATE TALENT EXCHANGED BY TOP ENTERPRISE FUNCTIONS – LAST 12 MONTHS



SECTION D5

Talent Movement Corridors

- Telangana State
- Hyderabad City
- Industry Sectors
- Enterprise Functions
- **Experience Buckets**



TELANGANA INTER STATE TALENT MOVEMENT

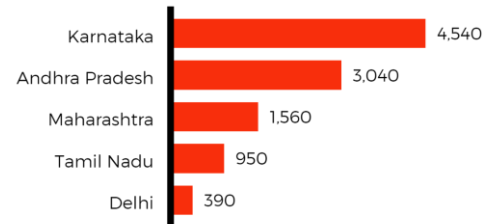
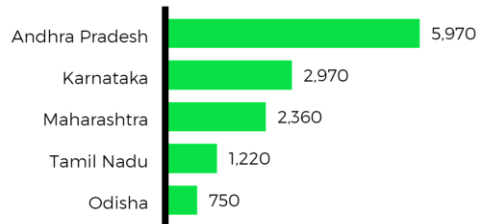
INTERSTATE TALENT EXCHANGED BY EXPERIENCE LEVELS – LAST 12 MONTHS

EXPERIENCE BUCKET

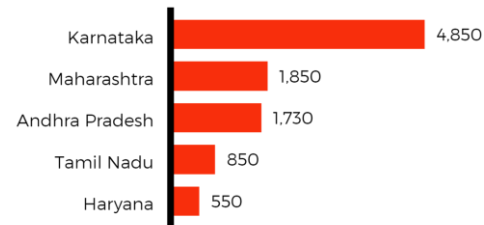
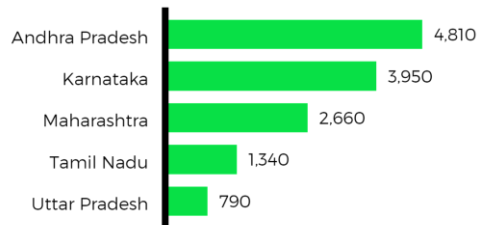
TALENT GAINED FROM

TALENT LOST TO

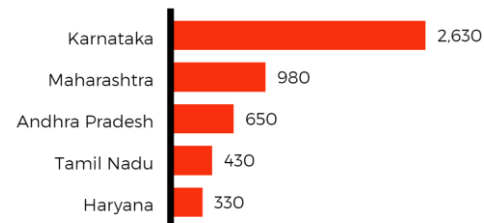
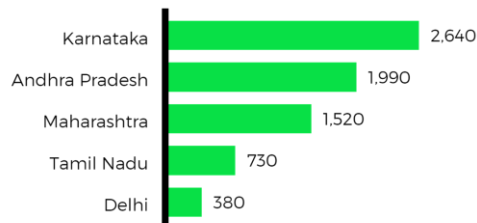
1 – 3 Years



3 – 6 Years

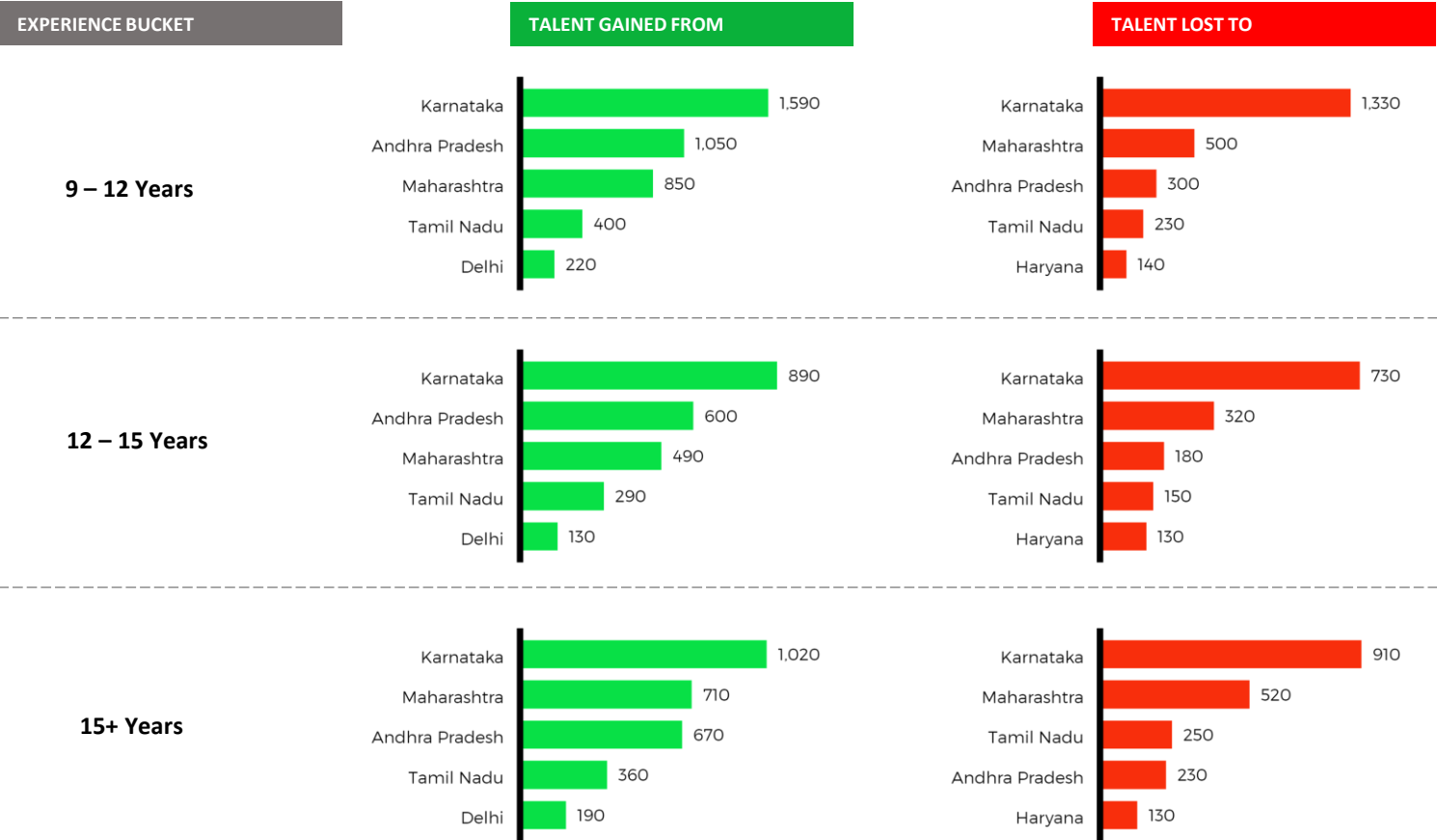


6 – 9 Years



TELANGANA INTER STATE TALENT MOVEMENT

INTERSTATE TALENT EXCHANGED BY EXPERIENCE LEVELS – LAST 12 MONTHS



SECTION E

Talent Desirability

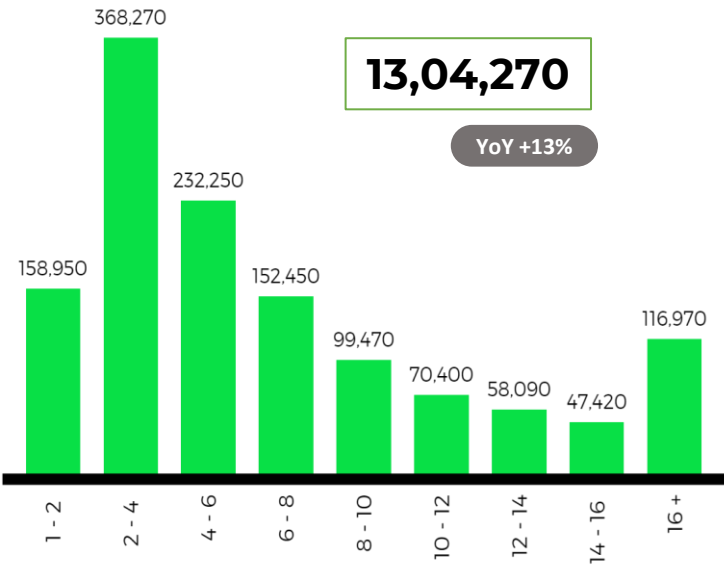
Jobseeker preferences for Telangana



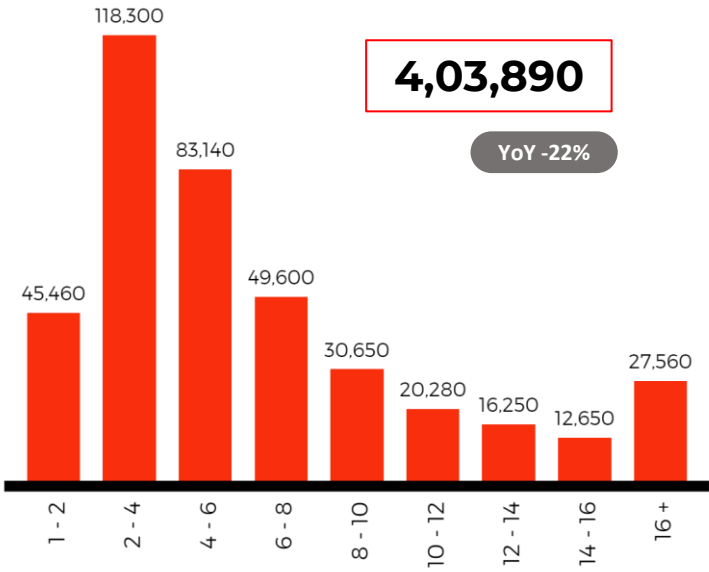
TELANGANA TALENT DESIRABILITY – JOBSEEKER PREFERENCES

EXPERIENCE WISE ACTIVE JOBSEEKERS WITH PREFERENCE FOR TELANGANA

Inbound Jobseekers (From Other States to Telangana)



Outbound Jobseekers (From Telangana to Other States)

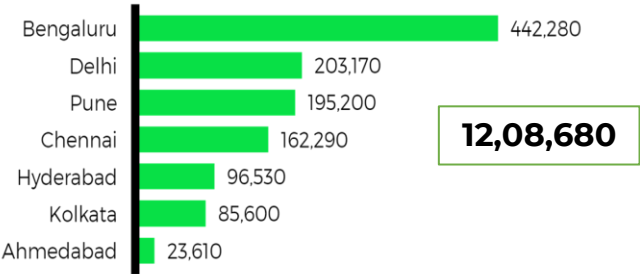


Telangana has a solid line up of white-collar talent with preference to move to the state. The volume of inbound jobseekers is more than the count of outbound jobseekers from Telangana. This signals growing desirability for the state & its ability to have a higher retention of talent.

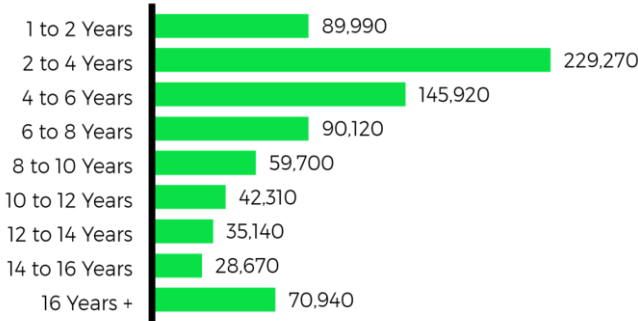
HYDERABAD TALENT DESIRABILITY – JOBSEEKER PREFERENCES

MEGACITIES & EXPERIENCE WISE ACTIVE JOBSEEKERS WITH PREFERENCE FOR HYDERABAD

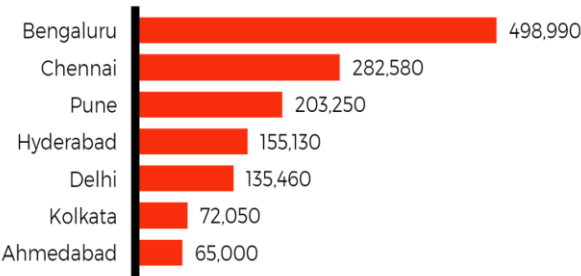
Inbound Jobseekers (From Megacities to Hyderabad)



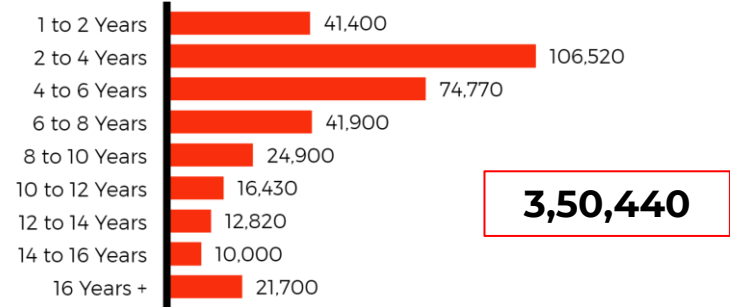
Inbound Jobseekers by YoE (From Megacities to Hyderabad)



Outbound Jobseekers (From Hyderabad to Megacities)



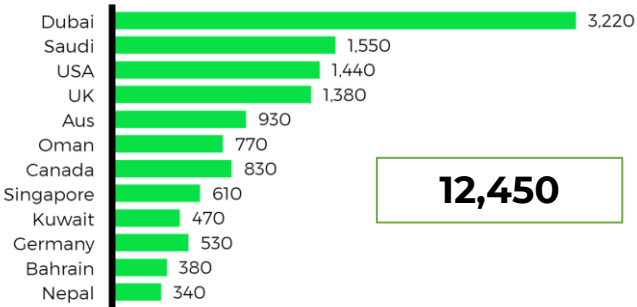
Outbound Jobseekers by YoE (From Hyderabad to Megacities)



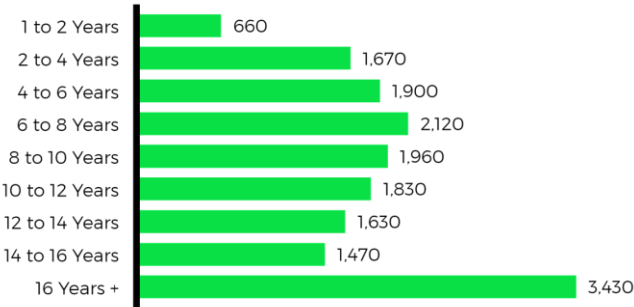
HYDERABAD TALENT DESIRABILITY – JOBSEEKER PREFERENCES

COUNTRIES & EXPERIENCE WISE ACTIVE JOBSEEKERS WITH PREFERENCE FOR HYDERABAD

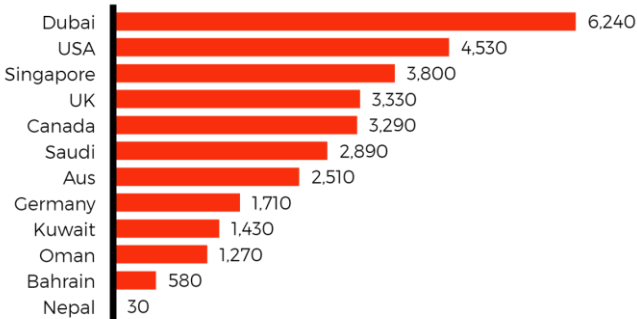
Inbound Jobseekers (From Overseas to Hyderabad)



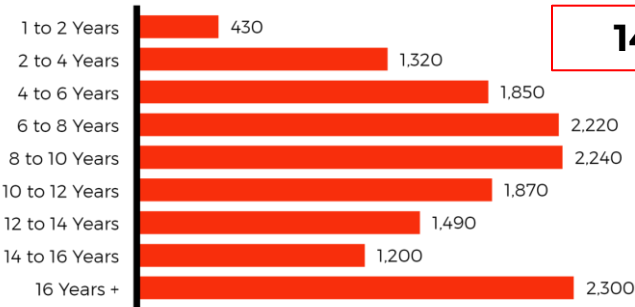
Inbound Jobseekers by YoE (From Overseas to Hyderabad)



Outbound Jobseekers (From Hyderabad to Overseas)



Outbound Jobseekers by YoE (From Hyderabad to Overseas)



Telangana: Talent Positivity

2023 vs 2024



Telangana State – Key statistics	2023	2024	YoY Change
Accessible White-collar workforce	37.29 Lakh	41.89 Lakh	+12%
White-collar talent with minimum work experience	18.46 Lakh	20.98 Lakh	+14%
White-collar talent active in job market	6.13 Lakh	6.31 Lakh	+3%
Female : Male ratio in white-collar workforce	31 : 69	32 : 68	Female ratio grew by 1% point
Tech Sector Talent pool – #1 of Top 5 Sectors	6.22 Lakh	7.54 Lakh	+21%
Top 4 Non-tech Sectors – Collective Talent pool	4.15 Lakh	4.39 Lakh	+6%
Engineering & IT Function Talent pool	5.90 Lakh	6.71 Lakh	+16%
Top 3 Non-tech Functions Talent pool	3.73 Lakh	4.17 Lakh	+12%
Talent Pool with Bachelors Degree	10.52 Lakh	12.37 Lakh	+18%
Talent Pool with Masters Degree	4.06 Lakh	4.61 Lakh	+14%
Talent Pool with MBA	3.32 Lakh	3.35 Lakh	+1%
Talent absorption from other states – 12 months	72,000	61,600	-14%
Talent lost to other states – 12 months	66,000	41,400	-37%
Net Talent Balance	+6000	+20200	237%
Talent Balance Status	PTB	PTB	Retained Talent Positive status
Rank among Positive Talent Balance States	3	3	Retained Ranking

Telangana State – Key statistics – Talent Corridors	2023	2024	YoY Change
Top Indian state – Talent absorbed from	Andhra Pradesh	Andhra Pradesh	No change
Top Indian state – Talent lost to	Karnataka	Karnataka	No change
Top country – Talent absorbed from	USA	USA	No change
Top country – Talent lost to	USA	USA	No change
Top Indian city – Talent absorbed from	Bengaluru	Bengaluru	No change
Top Indian city – Talent lost to	Bengaluru	Bengaluru	No change
Top Overseas city – Talent absorbed from	Dubai	Dubai	No change
Top Overseas city – Talent lost to	Dubai	Dubai	No change
Engineering Talent absorption from (Top State)	Andhra Pradesh	Andhra Pradesh	No change
Engineering Talent lost to (Top State)	Karnataka	Karnataka	No change
IT Talent absorption from (Top State)	Andhra Pradesh	Andhra Pradesh	No change
IT Talent lost to (Top State)	Karnataka	Karnataka	No change
Inbound jobseekers – Other States to Telangana	11.50 Lakh	13.04 Lakh	+13%
Outbound jobseekers – Telangana to Other States	5.15 Lakh	4.03 Lakh	-22%
Inbound jobseekers – Overseas to Telangana	16,000	19,300	+21%
Outbound jobseekers – Telangana to Overseas	21,000	15,700	-25%



T+ve

A Talent Positive Telangana

October 2024

A Workforce Research release by

Xpheno
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