

Xpheno

BENGALURU GCCs

The Leadership Quotient

An Xpheno Research release

April 2026





Executive Summary	5
Leadership Quotient – RAG Status & Action Board	6
Geographic Parameters	7
Enterprise Parameters	13
Sectoral and Functional Parameters	21
Personal Profile Parameters	27

“ Cost arbitrage has long been retired as the primary reason for setting up and operating GCCs. The focus has now shifted to the width and depth of talent and leadership India has to offer across sectors, enterprise functions and specialized skills. As the World continues to come to India, one GCC at a time, the Leadership Quotient that every hotspot builds and enriches will be the eventual differentiator in the GCC hosting race.

Kamal Karanth
Co-founder, Xpheno



“ More global enterprises and mega brands are making a beeline to India, on the GCC channel, to capitalize on the People, Physical and Policy infrastructure we offer. The depth and width of Leadership talent with global exposure and expertise is encouraging and eases the entry journey of GCCs. Multiple geographic hotspots with healthy Leadership Quotient is a shot in the arm for India's global competitiveness in hosting GCCs.

Siddharth Verma
Business Head, Xpheno Executive Search



EXECUTIVE SUMMARY

Global Enterprises entering India through the channel of Global Capability Centers (GCCs) continue to be on the rise and their reasons to do so are evolving in variety and velocity too. Cost arbitrage has long been retired as the primary reason for setting up and operating GCCs. The focus has now shifted to the width and depth of talent and leadership India has to offer across sectors, enterprise functions and specialized skills.

We, at Xpheno, study different talent dimensions that impact the competitive positioning of a location and Leadership is key among them. The Leadership Quotient is a measure across 4 data dimensions around the GCC Leadership Landscape. The dimensions are Geographic, Enterprise, Sectoral & Functional and Personal Profile. The parameters of study are clustered into 3 groups to assess **Scale, Sustainability and Stability** aspects of the leadership pool.

This **1st Edition of the Xpheno Leadership Quotient** study focusses on Bengaluru – the top GCC hotspot of India. The leadership slice considered for the study comprises of 95 leadership role titles in GCCs, covering AVP / VP and above levels, and including Heads of Units & Functions, Directors, Site Heads, MDs and Country Heads.

The highlights of this report are:

- Bengaluru as the top GCC hotspot currently holds a **leadership pool of over 15K** active and accessible professionals.

SCALE

- Scale of talent is measured in terms of density of leadership in the relevant pool of active GCC talent in Bengaluru.
- The overall Leadership Density of Bengaluru's GCC current workforce is 1:50 i.e one in every 50 active professionals are part of the leadership pool. This is a high to very high density of active leadership in the overall workforce.
- The mid and senior layers of leadership are more than sufficiently sized with density as 1:85 and 1:180. Both layers have sufficient leadership pipeline and headroom to load larger circles of control.
- Entry level leadership pipeline could be under stress if not improved in the coming years.
- For the current outlook of GCC growth in Bengaluru, the current 8% annual net growth in leadership pool could just be a tad below sufficient levels.

SUSTAINABILITY

- Irrespective of the scale of leadership talent, the parameters of sustainable leadership development is key for a location to maintain a healthy leadership quotient.
- The current sectoral distribution of GCC leadership in Bengaluru is well inline with the overall sectoral mix of the GCC ecosystem. The prospects to develop future sectoral leadership to go with changing sectoral dynamics is high and positive in the Bengaluru leadership ecosystem.
- The distribution of leadership across enterprise functions is currently skewed towards the Business Development & Sales function. The functional mix of leadership requires to be improved for future pipelining.
- The experience level of leadership is mid-heavy with 59% of all leadership currently in the mid Operational Leadership layers.
- Investments on elevating and preparing leaders for strategic leadership layers at the top will be essential for Bengaluru to create and host most global leadership roles in future.
- Gender Diversity as a factor of sustainable leadership is an area of focus and development for the Bengaluru GCC ecosystem. Current level of less than one-fourth active leaders being Women professionals is below desired levels, to undertake diversified leadership mandates from global firms.

STABILITY

- Bengaluru's GCC Leadership pool has sufficient stability in terms of stickiness with mid to high average median tenures across career paths.
- Apart from being the top hotspot by leadership volume, Bengaluru GCCs are also net Talent Positive by attracting and retaining more leaders than what they lose to other geographies.

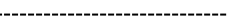
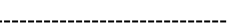
As the World continues to come to India, one GCC at a time, the Leadership Quotient that every hotspot builds and enriches will be the eventual differentiator in the GCC hosting race.

Kamal Karanth

Co-Founder, Xpheno

BENGALURU GCCs – THE LEADERSHIP QUOTIENT

RAG STATUS & ACTION GRID OF LEADERSHIP PARAMETERS

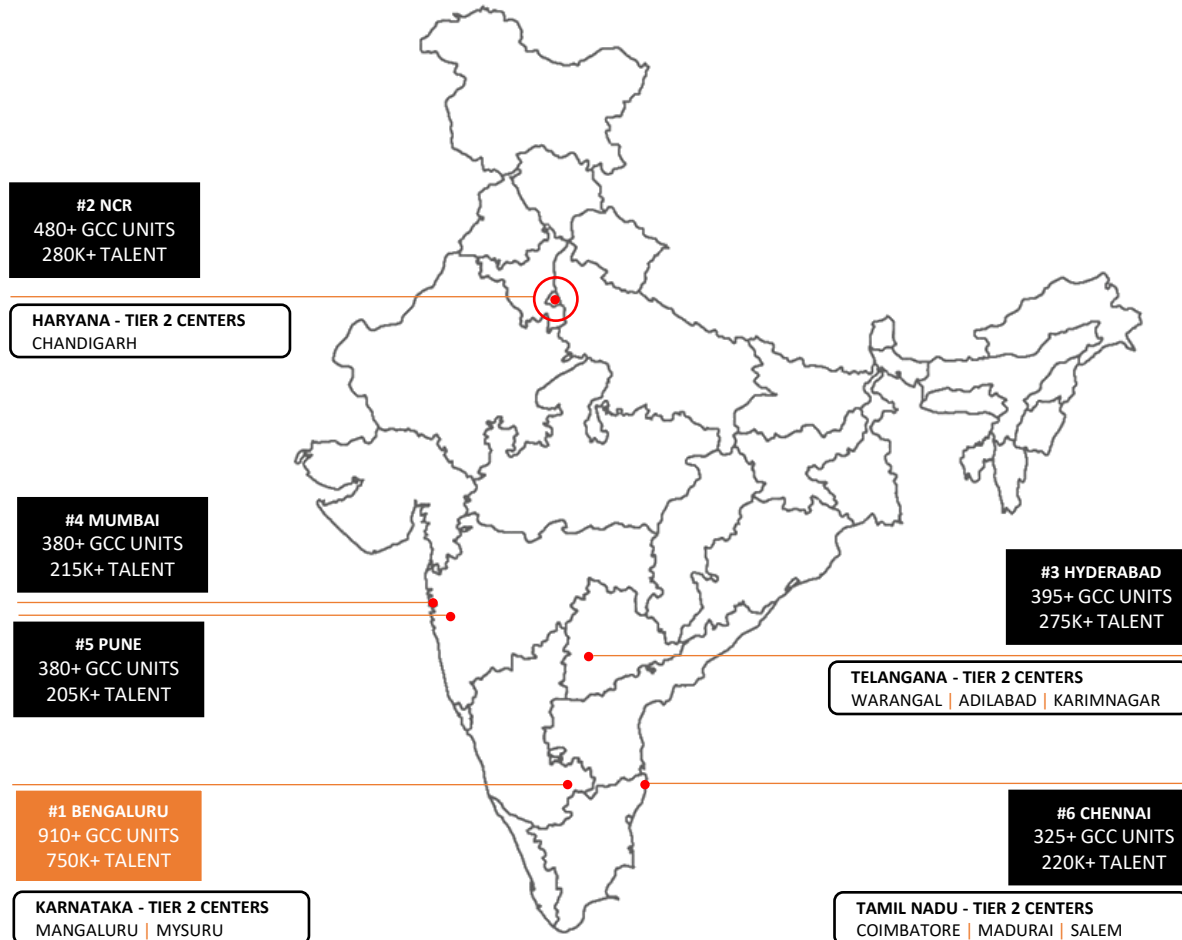
CLUSTER	PARAMETER	SCORE	RAG STATUS	ACTION
SCALE	LEADERSHIP DENSITY – OVERALL	1:50		SUSTAIN
SCALE	EMERGING LEADERSHIP – DENSITY	1:375		IMPROVE
SCALE	OPERATIONAL LEADERSHIP – DENSITY	1:85		SUSTAIN
SCALE	STRATEGIC LEADERSHIP – DENSITY	1:180		SUSTAIN
SCALE	ANNUAL NET RISE IN VOLUME	8%		IMPROVE
SUSTAINABILITY	SECTORAL DISTRIBUTION – ALIGNMENT	HIGH		SUSTAIN
SUSTAINABILITY	FUNCTIONAL DISTRIBUTION – ALIGNMENT	MID		IMPROVE
SUSTAINABILITY	EMERGING LEADERSHIP – COMPOSITION	13%		IMPROVE
SUSTAINABILITY	OPERATIONAL LEADERSHIP – COMPOSITION	59%		SUSTAIN
SUSTAINABILITY	STRATEGIC LEADERSHIP – COMPOSITION	28%		IMPROVE
SUSTAINABILITY	DIVERSITY – WOMEN LEADERS	24%		IMPROVE
STABILITY	MEDIAN TENURE IN YEARS	6.5		SUSTAIN
STABILITY	NET TALENT BALANCE ON MOVEMENTS	T+ve		SUSTAIN

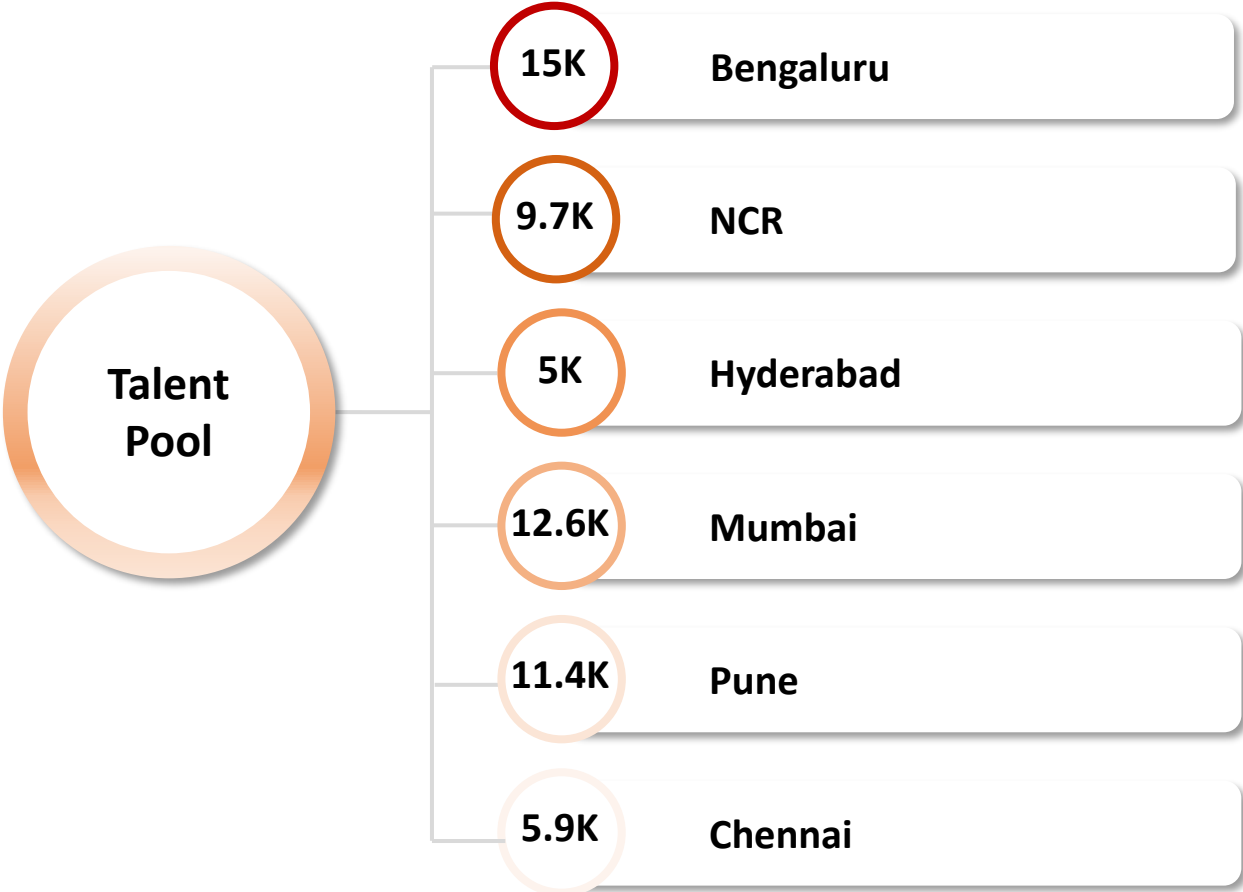
GCC LEADERSHIP LANDSCAPE GEOGRAPHIC PARAMETERS



INDIA GCCs - HOTSPOTS

LOCATIONS BY GCC UNITS & HEADCOUNT







15K

Talent Pool



8%

1 Year Growth



F 24%
M 76%

Gender Diversity



6.5
Years

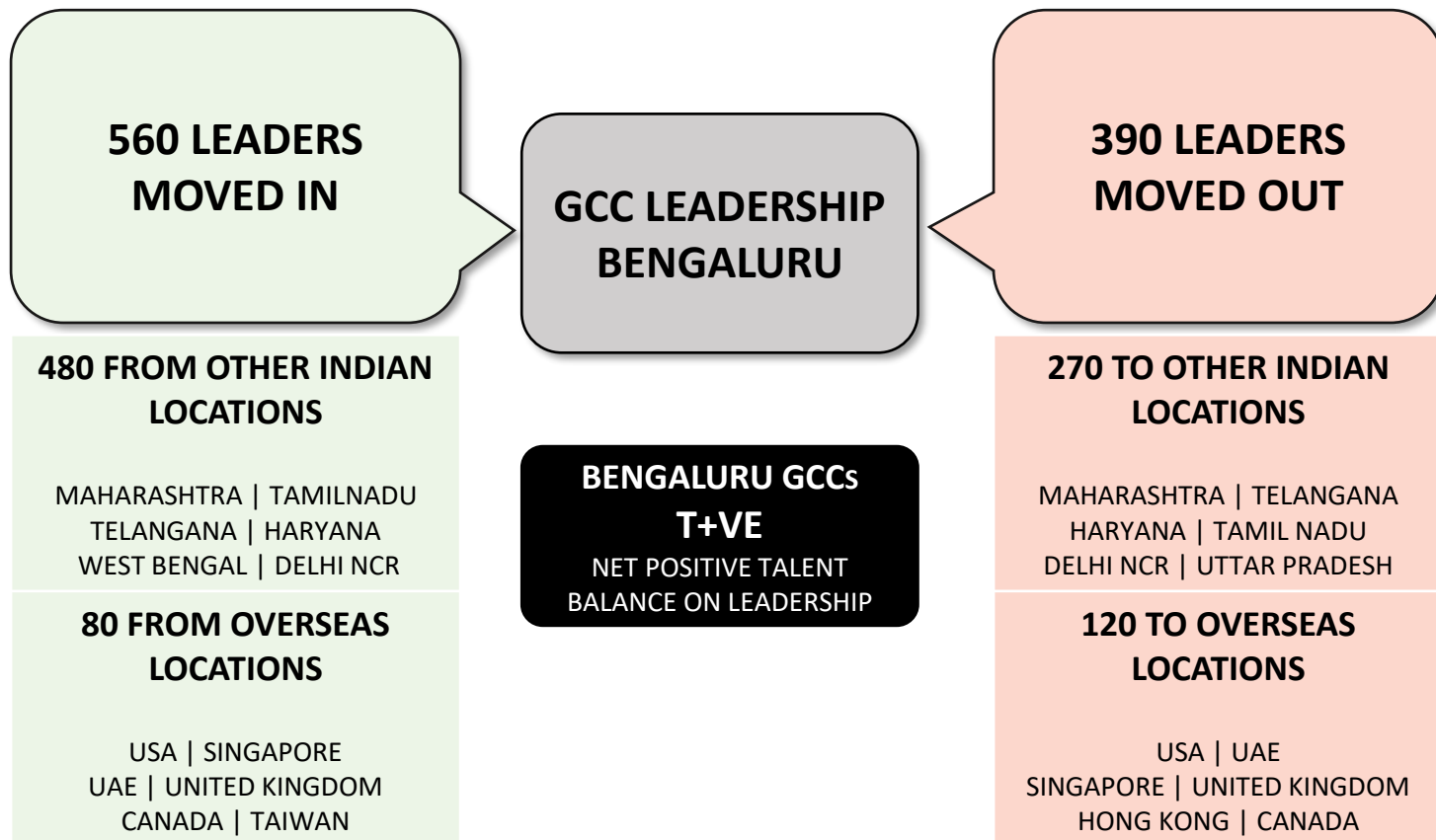
Median Tenure

GCC LEADERSHIP TALENT SNAPSHOT SUMMARY

	BLR	NCR	HYD	MUM	PUN	CHN
TALENT POOL	15K	9.7K	5K	12.6K	11.4K	5.9K
1 YEAR GROWTH	8%	10%	6%	11%	9%	11%
FEMALE %	24%	21%	22%	22%	20%	21%
MALE %	76%	79%	78%	78%	80%	79%
MEDIAN TENURE	6.5 Years	7.7 Years	6 Years	6.9 Years	7.4 Years	7.3 Years
LEADERSHIP RATIO	1:50	1:28	1:55	1:18	1:18	1:36

GCC LEADERSHIP TALENT CORRIDORS – BENGALURU

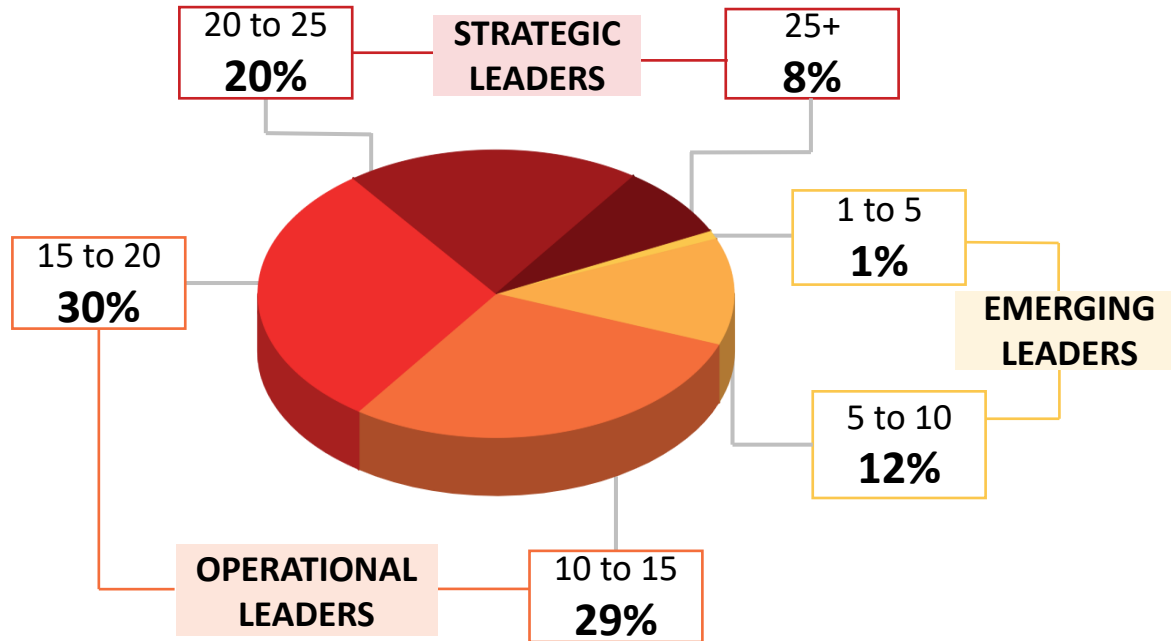
LAST 12 MONTHS PERIOD



GCC LEADERSHIP LANDSCAPE ENTERPRISE PARAMETERS



GCC LEADERSHIP BY CATEGORY - BENGALURU



Bengaluru GCCs have an **active accessible leadership talent pool of 15k professionals** holding active positions as CXOs, Directors, VPs/AVPs and Heads & Chiefs of enterprise functions.

13% of the total active accessible leadership talent are Emerging Leaders with less than 10 years of professional experience.

59% of the leadership talent pool are in the Operational Leaders cohort with 10 to 20 years experience range and 28% are in the Strategic Leaders cohort with 20+ years of experience.

GCC LEADERSHIP BY CATEGORY - HOTSPOTS

	YoE	BLR	NCR	HYD	MUM	PUN	CHN
EMERGING LEADERS	1 TO 5	200	200	100	200	100	100
	5 TO 10	1800	800	400	1400	700	500
OPERATIONAL LEADERS	10 TO 15	4300	2400	1100	3700	4100	1500
	15 TO 20	4500	3600	1800	4000	4400	2000
STRATEGIC LEADERS	20 TO 25	3000	2000	1200	2400	1700	1300
	25+	1200	700	400	900	400	500
TOTAL		15000	9700	5000	12600	11400	5900

GCC LEADERSHIP BY CATEGORY - HOTSPOTS

	YoE	BLR	NCR	HYD	MUM	PUN	CHN
EMERGING LEADERS	1 TO 5	1%	2%	2%	2%	1%	2%
	5 TO 10	12%	8%	8%	11%	6%	9%
OPERATIONAL LEADERS	10 TO 15	29%	25%	22%	29%	36%	25%
	15 TO 20	30%	37%	36%	32%	39%	34%
STRATEGIC LEADERS	20 TO 25	20%	21%	24%	19%	15%	22%
	25+	8%	7%	8%	7%	3%	8%

GCC LEADERSHIP TALENT SNAPSHOT - BENGALURU

EMERGING LEADERS - SCALE, STABILITY & DIVERSITY

		1 to 5 YoE	5 to 10 YoE
	Talent	200	1800
	1 Yr Growth	17%	30%
	Churn	11%	15%
	Gender Diversity	M – 70% F – 30%	M – 74% F – 26%
	Median Tenure	2.6 Years	5.2 Years

GCC LEADERSHIP TALENT SNAPSHOT - BENGALURU

OPERATIONAL LEADERS - SCALE, STABILITY & DIVERSITY



	10 to 15 YoE	15 to 20 YoE
 Talent	4300	4500
 1 Yr Growth	11%	5%
 Churn	11%	8%
 Gender Diversity	M – 74% F – 26%	M – 77% F – 23%
 Median Tenure	5.4 Years	6.2 Years

YoE – Years of Experience

GCC LEADERSHIP TALENT SNAPSHOT - BENGALURU

STRATEGIC LEADERS - SCALE, STABILITY & DIVERSITY

	20 to 25 YoE	25+ YoE
 Talent	3000	1200
 1 Yr Growth	-1%	NA
 Churn	6%	7%
 Gender Diversity	M – 79% F – 21%	M – 84% F – 16%
 Median Tenure	7.2 Years	8.7 Years

GCC LEADERSHIP TALENT SNAPSHOT - BENGALURU

SUMMARY TABLE

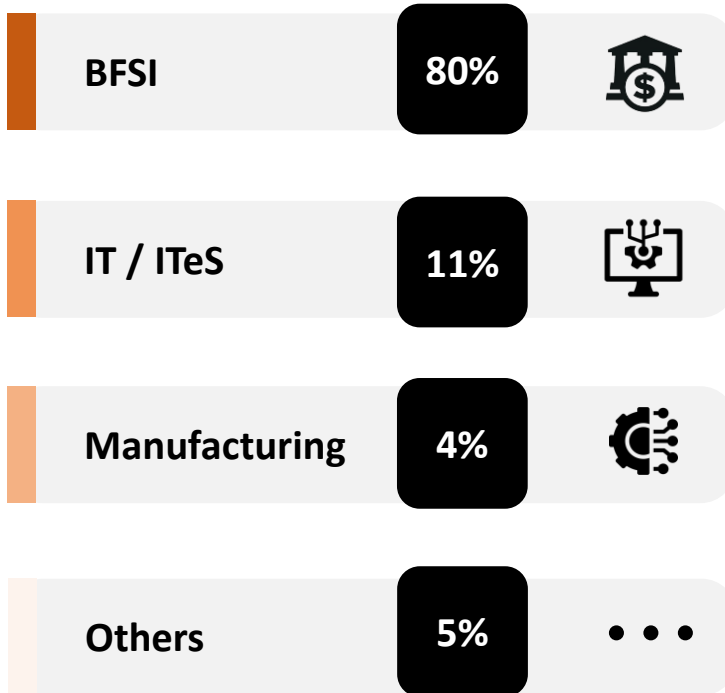
	YoE	Total Talent	1 Year Growth	Churn %	Gender Diversity		Median Tenure (Years)
					Male	Female	
EMERGING LEADERS	1 to 5	200	17%	11%	70%	30%	2.6
	5 to 10	1800	30%	15%	74%	26%	5.2
OPERATIONAL LEADERS	10 to 15	4300	11%	11%	74%	26%	5.4
	15 to 20	4500	5%	8%	77%	23%	6.2
STRATEGIC LEADERS	20 to 25	3000	-1%	6%	79%	21%	7.2
	25+	1200	NA	7%	84%	16%	8.7

GCC LEADERSHIP LANDSCAPE **SECTORAL & FUNCTIONAL PARAMETERS**



SECTORAL DISTRIBUTION OF GCC LEADERSHIP - BENGALURU

TOP SECTORS



Top 3 Industry Sectors collectively account for over **95% of the leaders in Bengaluru GCCs.**

The sectoral distribution is a direct reflection of the prominence of the BFSI sector in the Indian GCC ecosystem.

TOP EMPLOYERS – BENGALURU GCCs

BY SIZE OF ACTIVE LEADERSHIP POOL



BFSI



Goldman Sachs



Wells Fargo



HSBC



Morgan Stanley



Deutsche Bank



IT / ITeS



SAP



Visa



IBM



EXL



Kyndryl



Manufacturing



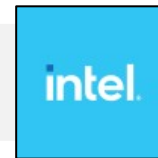
Schneider Electric



Dell Technologies



Siemens



Intel



Diageo

... Others



Deloitte



EY



IQVIA



Eli Lilly



GE Healthcare

EMERGING TOP EMPLOYERS – BENGALURU GCCs

BY SIZE OF ACTIVE LEADERSHIP POOL



BFSI



State Street



Standard Chartered



Swiss Re



Citi



MUFG



IT / ITeS



Microsoft



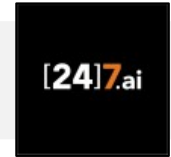
Salesforce



Bosch



Cisco



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Manufacturing



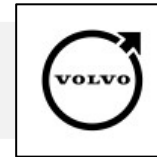
Honeywell



Infineon Technologies



Harman



Volvo Group



Unilever

• • • Others



PwC



KPMG



Siemens Healthineers



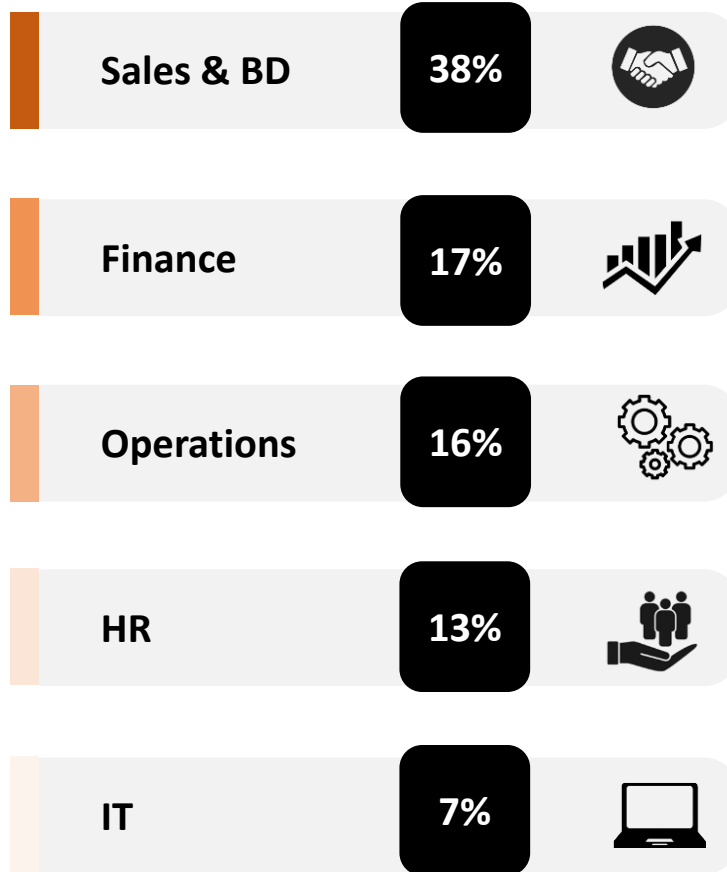
Merck Group



AstraZeneca

FUNCTIONAL DISTRIBUTION OF GCC LEADERSHIP - BENGALURU

TOP ENTERPRISE FUNCTIONS

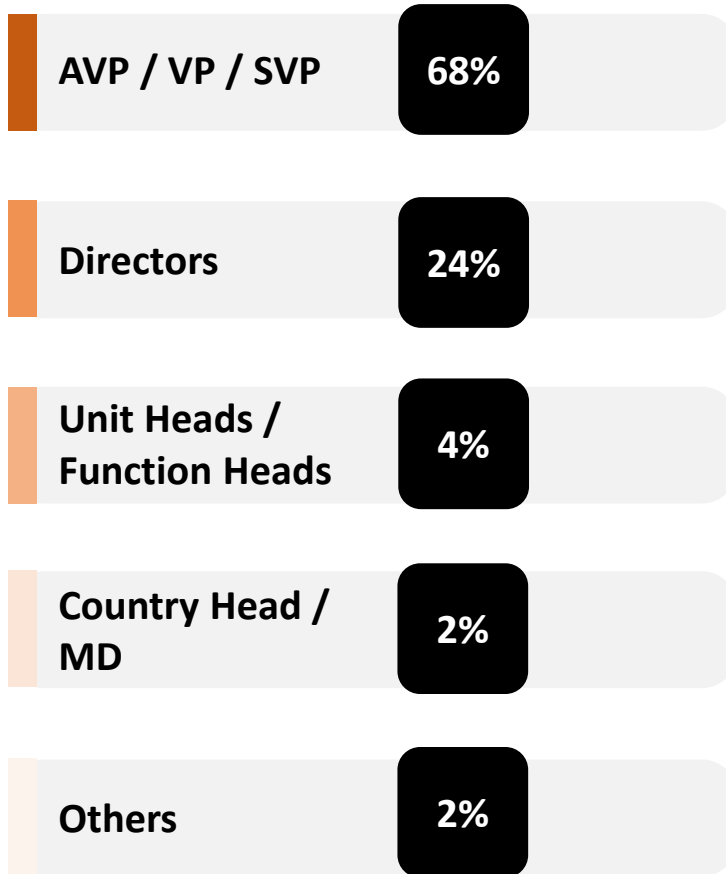


Top 5 Enterprise Functions collectively account for over **91% of the leaders in Bengaluru GCCs**.

The functional distribution of leadership roles denotes the functional focus and preference for leadership of a certain experience pedigree mix.

ROLE DISTRIBUTION OF GCC LEADERSHIP - BENGALURU

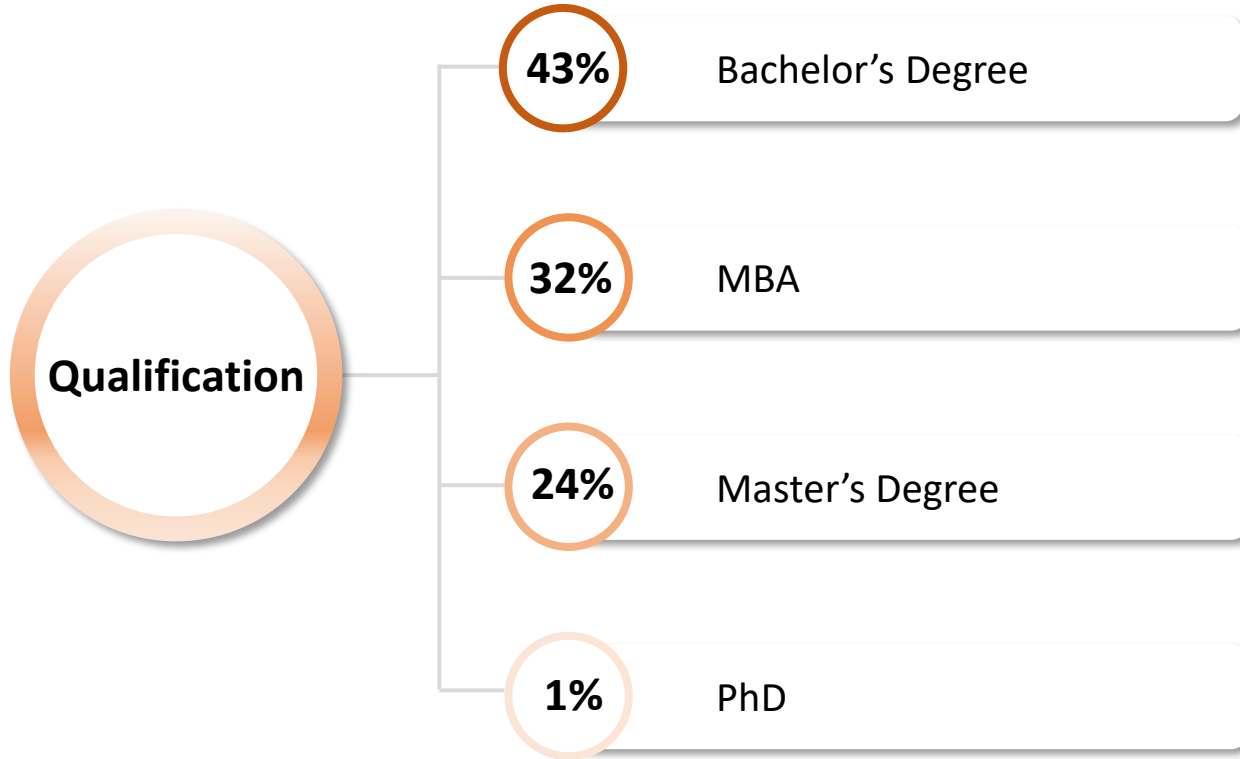
TOP ROLES

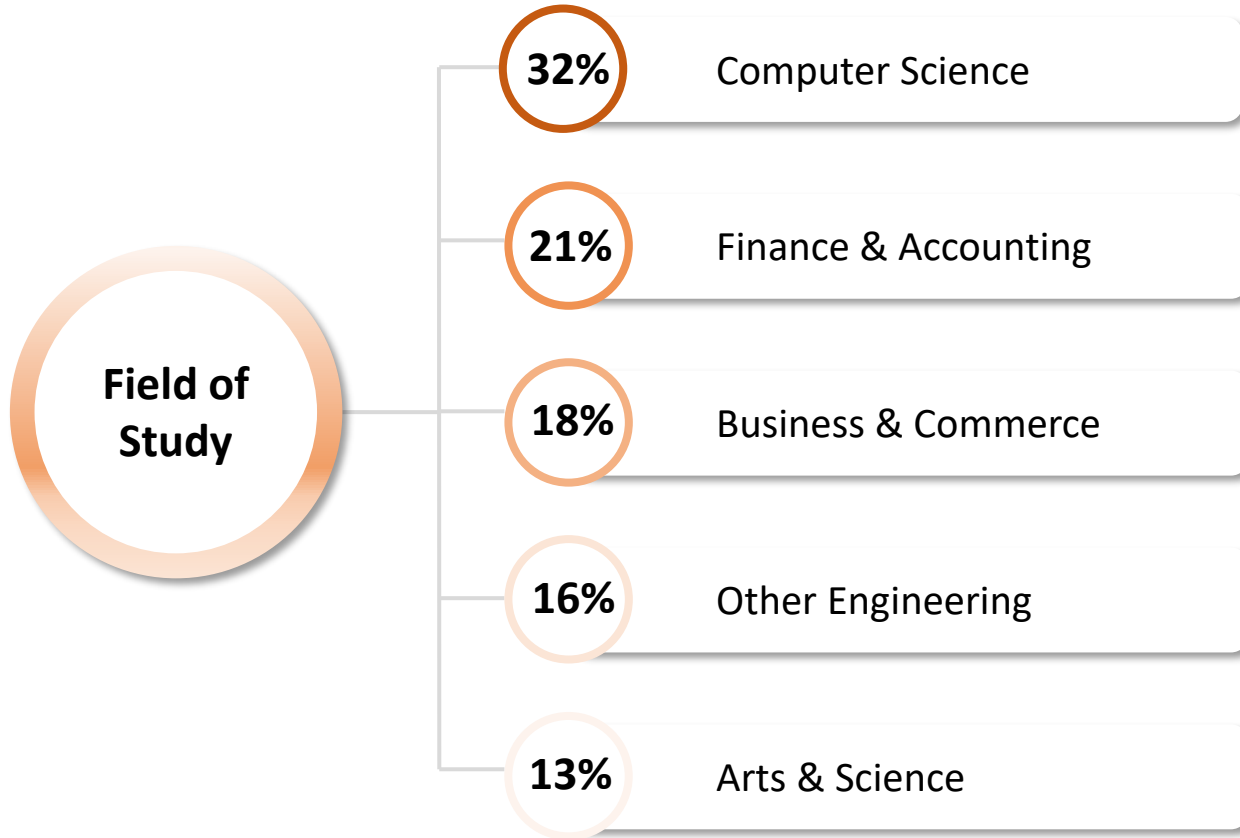


The top roles by count of leaders is reflective of the nature of organograms that the top GCC sectors build and maintain. The **more than 2/3rd presence of leaders holding AVP / VP & SVP roles** shows the functional width of critical roles created among GCCs.

GCC LEADERSHIP LANDSCAPE PERSONAL PROFILE PARAMETERS







FAST GROWING FUNCTIONAL SKILLS BY SECTOR - BENGALURU

POPULAR SKILLS AMONG LEADERSHIP TALENT

Top Skills by growing popularity among leadership talent

BFSI	Data Processing & Data Structures	Python	Docker Products	JavaScript	Cloud Applications
MANUFACTURING	P&L Management	Market Research & Analytics	Enterprise Resource Planning (ERP)	Six Sigma & Process Improvement	HR Transformation & Strategic HR
HEALTHCARE	Business Intelligence (BI) Tools & Analytics	Clinical Research & Pharmacology	Pharmacovigilance & Regulatory Submissions	Clinical Data Management	Good Clinical Practice (GCP)
TECH	Python & Core Java Programming	SQL & Data Management	Data Modelling & Data Analysis	Market Research	Cloud Applications



Bengaluru GCCs

The Leadership Quotient

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