

# INDIAN IT TALENT MARKET 2025–26

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A Market Intelligence Report for Senior Talent Acquisition  
and Workforce Planning Decision-Makers

9 Sub-Industries  
10 Cities

Talent Architecture  
Compensation  
Workforce Behaviour

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# EXECUTIVE SUMMARY

Key numbers across all sections — 2025–26

**\$300B**

**Industry Size 2025**

Projected ~\$330B by 2026

**6.0M**

**Formal IT Workforce**

+16% YoY job demand

**27%**

**GCC Share of Hiring**

Up from 15% in 2024

**90%**

**GenAI Talent Shortage**

1M roles demanded by 2026

**Fastest-growing sub-industries:**

Semiconductor (+56%), AI/Data (+40–50%), Cybersecurity (+44%), Cloud (+37%)

**Largest talent hubs:**

Bengaluru (43.5% of tech hiring), Hyderabad, Pune, NCR, Chennai

**Highest compensation premiums:**

GCC (+25–40%), Semiconductor (+30–50%), AI/ML (+20–30%)

**Highest scarcity roles:**

VLSI/Chip Design, AI Architects, Cloud Architects, Security Architects

**Campus recovery:**

+25% H1 FY26, but fresher share remains at just 15% (vs 35% pre-2023)

**Most competitive hiring cities:**

Bengaluru, Hyderabad for GCC; Pune for Cloud/DevOps

**Key behavioural shift:**

Volume hiring declining; skill-specific lateral hiring now dominant across all segments

SECTION 01

# INDUSTRY OVERVIEW

Market Size · Sub-Industry Growth · Workforce Distribution

01

# 1.1 INDUSTRY SIZE & HEADLINE METRICS

Indian IT Industry · 2025–26

**\$300B**

Industry Size

2025 (Taggd)

**9.5M**

Tech Professionals

Broader tech ecosystem

**5.8M**

Formal IT Workers

Core IT sector

**1.8M**

Roles Demanded

2025 · +16% YoY

**7%**

Hiring Growth FY27

Taggd forecast

Metric	Value	YoY / Context	Source
Industry Size 2025	\$300 billion	Projected ~\$330B by 2026 (+10%)	Taggd India Decoding Jobs 2026
Total Workforce (Broader Tech)	9.5 million	Includes tech-adjacent roles	Taggd 2026
Formal IT Workforce	~5.8 million	Core IT sector only	Qess Corp / WhalesBook
Net Job Demand 2025	1.8 million roles	+16% YoY vs 2024	Qess Corp IT Workforce Trends 2025
Projected New Jobs FY26	1.26 lakh (126,000)	Incremental additions	Taggd India Decoding Jobs 2026
Hiring Growth Rate FY27	7%	Moderating from 2025 surge	Taggd
Campus Intake Recovery H1 FY26	+25% improvement	From compressed 2024 base	Adecco India
Fresher Hiring Share 2025	15% of total hiring	Down from 35% pre-2023	Qess Corp

# 1.2 SUB-INDUSTRY GROWTH MATRIX

Headcount, growth rates and hiring momentum · 2025–26

Sub-Industry	2025 HC	2026 HC (Est.)	YoY Growth	% Workforce	% New Hiring	Momentum
IT Services & Consulting	3.2M	3.35M	+4.7%	54%	32%	Moderate
Enterprise / Product Software	1.1M	1.25M	+13%	18%	20%	High
GCC (Aggregate)	1.1M	1.45M	+32%	18.5%	28%	Very High
AI & Data Analytics	500K	700–750K	+40–50%	7.5%	22%	Very High
Internet & E-commerce	450K	500K	+11%	7.5%	8%	Moderate
SaaS	400K	520K	+30%	6.7%	12%	Very High
Cloud Infrastructure & DevOps	350K	480K	+37%	5.8%	15%	Very High
Cybersecurity	250K	360K	+44%	4.2%	11%	Very High
FinTech	200K	280K	+40%	3.3%	9%	Very High
Semiconductor & Embedded	180K	280K	+56%	3%	9%	Very High
<b>TOTAL</b>	<b>6.0M</b>	<b>7.26M</b>	<b>+21%</b>	<b>100%</b>	<b>100%</b>	<b>—</b>

# 1.3 STRUCTURAL SHIFTS & DEMAND DYNAMICS

Automation · GCC expansion · GenAI role creation · 2025–26

## GCC Reshaping Talent Wars

GCC share of hiring: 15% (2024) → 27% (2025) → est. 28–30% (2026). 1,700–1,900 active centres. Compensation premium +25–40% vs. IT Services baseline.

## GenAI Role Creation

AI talent demand crosses 1M by 2026. +40–50% hiring in AI/ML roles. 90% GenAI-ready talent shortage. 77% of CEOs investing in AI productivity.

## Legacy Role Compression

Legacy skills <10% of 2025 hiring (down from 15–20% in 2023). Est. 400K–500K roles phased by 2028. TCS cut 12,000 roles (July 2025) as AI pivot.

## Cloud Infrastructure Surge

Data centre capacity: 1,000 MW → 2,000 MW by 2026 (100% expansion). Hyperscaler capex \$15B+ (2026–27). +100K–150K new infra roles in 2026.

## Campus Recovery — From Low Base

Campus intake +25% in H1 FY26; 82K FY26 projected. BUT: fresher hiring is 15% of total (vs 35% pre-2023). Growth is real; base is compressed.

SECTION 02

# COMPETITION MAPPING

# 02

Top Employers · India Headcount · City Footprint · Dominant Functions

## 2.1 TOP EMPLOYERS — IT SERVICES & GCC

India headcount · dominant cities · hiring focus · 2025–26

Company	Type	India HC	Key Cities	Dominant Functions	Hiring Focus
TCS	IT Services	~614,000	Mumbai, Pune, Bengaluru, Chennai, Hyderabad	Engineering, Consulting, Testing	AI/ML upskilling; selective lateral
Infosys	IT Services	~317,000	Bengaluru, Pune, Hyderabad, Chennai	Engineering, Digital, Cloud	AI-first delivery; campus + lateral
Wipro	IT Services	~230,000	Bengaluru, Hyderabad, Pune	Engineering, Digital, BPO-adjacent	Selective; cloud/AI transformation
HCLTech	IT Services	~227,000	NCR, Chennai, Bengaluru, Hyderabad	Engineering, Products, Infra	Product engineering; HCL Software
Cognizant	IT Services	~215,000	Chennai, Bengaluru, Hyderabad	BPO-Tech, Digital, Consulting	Re-hiring post-attribution; AI focus
Tech Mahindra	IT Services	~148,000	Hyderabad, Pune, Bengaluru	Telecom, Digital, Engineering	Telecom infra; AI pivot
Google India GCC	GCC	~10,000+	Hyderabad, Bengaluru	AI/ML Research, Product, Cloud	Deep tech; R&D expansion
Microsoft India GCC	GCC	~15,000+	Hyderabad, Bengaluru, NCR	Azure, GitHub, LinkedIn India	Cloud, AI, Developer tools
Amazon/AWS India	GCC/E-comm	~75,000	Bengaluru, Hyderabad	Alexa, AWS, Retail Tech	Cloud infra; AI services
Intel India GCC	Semiconductor/ GCC	~4,500	Bengaluru	Chip Design, VLSI, Hardware	Semiconductor; deep tech hiring
NVIDIA India GCC	Semiconductor/ GCC	~3,000	Pune, Bengaluru	GPU Architecture, AI Hardware	Critical shortage; high comp

## 2.2 TOP EMPLOYERS — PRODUCT, SaaS, FINTECH & EMERGING

India headcount · city footprint · hiring focus · 2025–26

Company	Sub-Industry	India HC (Est.)	Key Cities	Dominant Functions	Hiring Focus
<b>Flipkart</b>	E-commerce / Product	~15,000	Bengaluru	Platform Eng, Data, Product	AI/ML; logistics tech
<b>Swiggy</b>	E-commerce / SaaS	~4,000 tech	Bengaluru	Platform, Data, Backend	AI-driven personalisation
<b>Zepto</b>	Quick Commerce	~1,500 tech	Mumbai, Bengaluru	Supply chain tech, Data	Scaling rapidly
<b>Razorpay</b>	FinTech	~2,500	Bengaluru	Payments, Backend, Security	ML for fraud; infra
<b>CRED</b>	FinTech	~1,000 tech	Bengaluru	Product, Data, Backend	Data engineering; AI
<b>BharatPe</b>	FinTech	~1,200	NCR, Bengaluru	Payments, ML, Backend	Regulatory tech; growth
<b>Zoho</b>	SaaS/Product	~15,000	Chennai, Coimbatore, Hyderabad	Full-stack, Product, QA	Campus hiring; self-funded model
<b>Freshworks</b>	SaaS	~4,000	Chennai, Bengaluru	Product, CS, Engineering	AI-first product features
<b>Chargebee</b>	SaaS / B2B	~1,200	Chennai	Product, Backend, Data	Series D scaling
<b>PhonePe</b>	FinTech	~3,500 tech	Bengaluru	Payments, Security, ML	Hyperscale infra; data
<b>Postman</b>	SaaS / Developer Tools	~500 India	Bengaluru	Engineering, Product	Lean; deep specialist roles

SECTION 03

# TALENT ARCHITECTURE

City-wise Talent Pools · Campus Hiring · Talent Gap Analysis

03

# 3.1 CITY-WISE TALENT POOL DISTRIBUTION

Tech hiring share · dominant sub-industries · employer concentration · 2025–26

City	Tech Hiring Share	Est. Tech HC	Dominant Sub-Industries	Strength / Profile	Tier-2 Trend
<b>Bengaluru</b>	43.5%	~2.6M	GCC, AI/ML, SaaS, E-commerce, Cloud	DOMINANT — broadest talent pool; all sub-industries present	Saturation driving spillover to Hyderabad
<b>Hyderabad</b>	~16%	~960K	IT Services, GCC, Cloud, Pharma-tech	Fast rising GCC hub; strong cloud/platform talent	—
<b>Pune</b>	~12%	~720K	IT Services, Cloud/DevOps, Semiconductor, FinTech	Strong DevOps/cloud; semiconductor satellite	—
<b>NCR (Gurgaon/Noida)</b>	~10%	~600K	IT Services, FinTech, Enterprise Software	Consulting and services HQ; policy proximity	Noida growing for IT Services delivery
<b>Chennai</b>	~9%	~540K	IT Services, SaaS (Zoho), Semiconductor	Deep IT Services roots; Zoho SaaS cluster; campus-rich	Coimbatore emerging SaaS hub
<b>Mumbai</b>	~5%	~300K	FinTech, IT Services, Internet	Financial services tech; HQ-heavy; not engineering hub	—
<b>Ahmedabad</b>	~2%	~120K	IT Services, SaaS (emerging)	Emerging; cost-competitive; infrastructure improving	Growing Tier-2 ambitions
<b>Kolkata</b>	~1.5%	~90K	IT Services, BPO-adjacent	Declining relative share; limited GCC presence	—
<b>Tier-2 Cluster (Coimbatore, Visakhapatnam, Indore, Jaipur)</b>	+7% YoY placement growth	~200K combined	IT Services, SaaS (early), Cloud (emerging)	Cost arbitrage -15–25%; GCC expansion driving satellite hubs	Rising—government policy + GCC expansion

## 3.2 TALENT GAP ANALYSIS BY SUB-INDUSTRY

Scarcity level · gap size · time-to-fill · critical roles · 2025–26

Sub-Industry	Scarcity Level	Gap Estimate	Critical Roles	Root Cause
AI & Data Analytics	<b>CRITICAL</b>	90% GenAI shortage; 53% overall deficit	AI Architect, ML Engineer, MLOps, GenAI Specialist	Demand 10x outpacing supply; no established university pipeline
Semiconductor & Embedded	<b>CRITICAL</b>	>70% shortage in VLSI/chip design	VLSI Designer, Chip Design Eng, Hardware Validation	National mission-driven demand; pipeline takes 6–8 yrs to build
Cybersecurity	<b>HIGH–CRITICAL</b>	25–30% shortage mid-to-senior	Security Architect, SOC Lead, Penetration Tester	Specialist ramp-up 3–5 yrs; certification-heavy
Cloud Infrastructure & DevOps	<b>HIGH</b>	55–60% cloud-native expertise deficit	Cloud Architect, SRE, Platform Engineer	Hyperscaler expansion outpacing certified cloud talent
GCC (All Types)	<b>HIGH</b>	Specialist R&D shortage across segments	ML Research Eng, Platform Architect, HW Engineer	Global competition for same talent pool
FinTech	<b>MODERATE–HIGH</b>	~30% shortage in payment/regulatory tech	Payments Backend, ML for Fraud, Compliance Eng	Niche intersection: finance + tech + regulation
SaaS	<b>MODERATE</b>	Product engineers available; AI/data tight	Full-Stack, Data Engineer, Product Manager	Startup equity uncertainty causes attrition
Enterprise/Product Software	<b>MODERATE</b>	SRE and platform roles scarce; otherwise balanced	Platform Engineer, Backend Architect	Moderate gap; supply improving with experience bands
Internet & E-commerce	<b>LOW–MODERATE</b>	Sufficient supply in core roles	Full-Stack, Backend Engineer	Funding moderation reducing competition pressure
IT Services & Consulting	<b>MODERATE (for AI/cloud)</b>	25% gap in AI/cloud upskilled profiles	AI/ML Engineer, Cloud Architect (within services)	Legacy workforce not upskilled; talent moving to GCC/product

SECTION 04

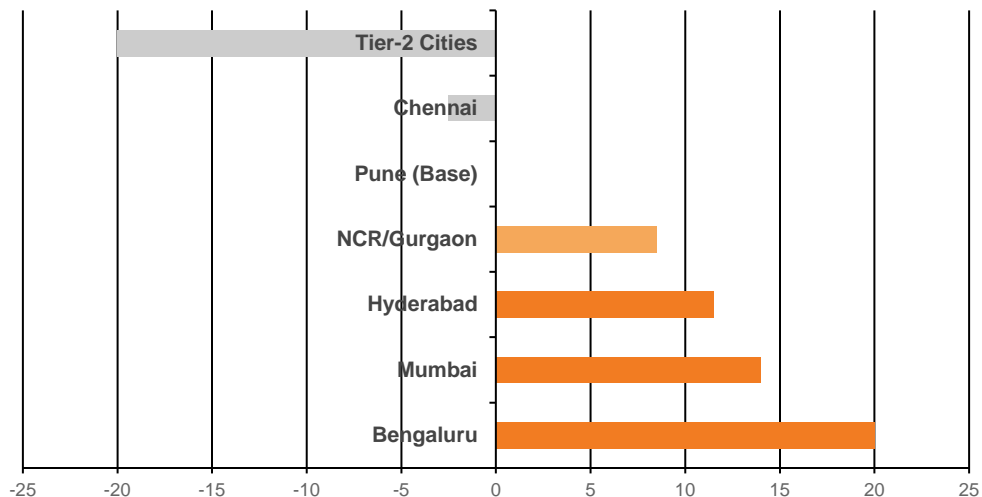
# COMPENSATION

Role × Experience Matrix · Sub-Industry Premiums · City Premiums · Skill Premiums

04

# 4.1 COMPENSATION FRAMEWORK & PREMIUMS

City Salary Premium vs Pune Baseline (%)



City	Premium vs Pune	Strongest For
Bengaluru	+15–25%	GCC, AI/ML, SaaS, E-commerce
Hyderabad	+8–15%	GCC, Cloud, IT Services
NCR/Gurgaon	+5–12%	IT Services, FinTech, Enterprise
Mumbai	+10–18%	FinTech, Internet, E-commerce
Pune	Base (0%)	IT Services, Cloud/DevOps
Chennai	-5 to 0%	IT Services, SaaS (Zoho)
Tier-2 Cities	-15 to -25%	IT Services delivery roles

## NICHE SKILL PREMIUMS (above role base)

GenAI / LLM	+30–50%
Kubernetes / Cloud Native	+20–30%
VLSI / Chip Design	+30–50%
Blockchain / DeFi	+25–40%
Zero Trust Security	+25–35%

## 4.2 COMPENSATION MATRIX — IT SERVICES & CONSULTING

Annual CTC (₹ Lakhs) · Role × Experience Band · 2025–26

Role	0–2 yr	3–7 yr	8–12 yr	13–17 yr	18–22 yr	22+ yr
Software Engineer	3.5–7	8–18	20–35	35–60	60–90	80–130
DevOps / SRE	4–8	10–22	22–40	40–70	65–100	90–150
Data Engineer	4–8	10–22	22–42	42–72	70–110	95–160
Business Analyst / Consultant	4–9	10–22	22–45	45–80	NA	NA
QA / Test Engineer	3–6	7–15	15–28	28–50	50–80	70–120
Project Manager / Delivery Mgr	NA	NA	30–40	45–65	80–110	110–200
Practice Head / Principal	NA	NA	30–60	60–110	100–160	140–250
Cloud Architect (within Services)	NA	NA	28–55	55–100	90–140	120–220
Cybersecurity (within Services)	4–8	10–22	22–45	45–80	75–120	100–180

All figures in ₹ Lakhs per annum (LPA) CTC. Ranges represent 25th–75th percentile. NA = role/experience combination not typical in market.

## 4.3 COMPENSATION MATRIX — AI/DATA ANALYTICS & GCC

Annual CTC (₹ Lakhs) · Role × Experience Band · 2025–26

Role	0–2 yrs	3–7 yrs	8–12 yrs	13–17 yrs	18–22 yrs	22+ yrs
Data Scientist	₹6–12	₹12–25	₹25–40	₹35–50	₹45–60	₹50+
ML Engineer	₹6–12	₹12–20	₹25–45	₹40–60	₹50–70	₹60+
AI Engineer	₹7–16	₹12–25	₹25–50	NA	NA	NA
Data Engineer (AI/ML)	₹6–10	₹12–18	₹20–35	NA	NA	NA
MLOps Engineer	NA	₹15–25	₹30–45	NA	NA	NA
NLP Engineer	NA	₹16–30	₹30–50	NA	NA	NA
CV Engineer	NA	₹16–30	₹30–50	NA	NA	NA
GenAI Specialist	NA	₹20–35	₹40–70	NA	NA	NA
AI Leadership	—	—	₹50–100	₹70+	₹80+	₹100+

All figures ₹ LPA CTC · 25th–75th percentile · GCC rows (cream) carry +25–40% premium vs IT Services baseline · NA = atypical

# 4.4 COMPENSATION MATRIX — ENTERPRISE / PRODUCT SOFTWARE

Annual CTC (₹ Lakhs) · Role × Experience Band · 2025–26

Role	0–2 yr	3–7 yr	8–12 yr	13–17 yr	18–22 yr	22+ yr
Backend Engineer	7–13	15–28	30–50	45–70	55–85	70–110
Frontend Engineer	6–12	14–24	26–42	40–60	50–75	65–95
Full-Stack Developer	6–12	14–26	28–48	42–65	55–80	70–110
DevOps / SRE	8–14	18–32	35–55	50–75	65–95	85–135
Cloud Architect	NA	24–40	38–55	55–80	75–115	100–165
Product Manager	9–15	20–36	38–60	55–85	70–110	90–155
Solutions Architect	NA	24–40	42–70	60–95	80–130	110–180
Platform Engineer	8–14	18–34	36–56	54–82	72–120	100–160

All figures ₹ LPA CTC · 25th–75th percentile · +25–40% premium vs. IT Services for Cloud/SRE roles · NA = atypical

# 4.5 COMPENSATION MATRIX — CLOUD INFRASTRUCTURE & DEVOPS

Annual CTC (₹ Lakhs) · Role × Experience Band · 2025–26

Role	0–2 yr	3–7 yr	8–12 yr	13–17 yr	18–22 yr	22+ yr
Cloud Engineer (AWS/Azure/GCP)	8–14	16–30	32–50	48–72	65–95	85–130
DevOps Engineer	8–14	17–32	35–55	52–80	70–110	95–150
Site Reliability Engineer (SRE)	9–15	20–35	38–60	56–85	75–125	105–180
Platform Engineer	8–14	18–34	36–56	54–82	72–120	100–160
Kubernetes / Container Specialist	NA	20–38	40–65	60–92	80–135	115–190
Cloud Architect (Multi-Cloud)	NA	24–42	42–68	62–95	82–140	110–185
Data Centre Operations Engineer	5–9	10–18	18–28	26–40	35–52	48–70
FinOps / Cloud Cost Engineer	NA	18–32	32–52	48–72	62–95	82–130

All figures ₹ LPA CTC · 25th–75th percentile · Kubernetes/SRE commands +35–55% premium · 55–60% nationwide shortage in cloud-native expertise · NA = atypical

## 4.6 COMPENSATION MATRIX — CYBERSECURITY

Annual CTC (₹ Lakhs) · Role × Experience Band · 2025–26

Role	0–2 yrs	3–7 yrs	8–12 yrs	13–17 yrs	18–22 yrs
<b>SOC Analyst</b>	5–8	8–12	12–18	NA	NA
<b>Network Security Eng</b>	5–10	10–15	15–25	NA	NA
<b>Cloud Security Eng</b>	NA	15–25	25–35	35–45	NA
<b>App Security Eng</b>	NA	18–25	25–32	NA	NA
<b>Threat Intelligence</b>	NA	10–18	18–25	NA	NA
<b>GRC</b>	NA	12–20	20–30	30–40	NA
<b>Security Architect</b>	NA	NA	25–40	40–50	50–70
<b>Penetration Tester</b>	7–12	12–20	20–30	30–40	NA
<b>Incident Response</b>	NA	15–25	25–35	NA	NA

All figures ₹ LPA CTC · 25th–75th percentile · Zero-Trust/IR roles command +30–50% premium · DPDP & RBI compliance driving +44% YoY hiring growth · NA = atypical

# 4.7 COMPENSATION MATRIX — SEMICONDUCTOR & EMBEDDED SYSTEMS

Annual CTC (₹ Lakhs) · Role × Experience Band · 2025–26

Role	0–2 yr	3–7 yr	8–12 yr	13–17 yr	18–22 yr	22+ yr
Embedded Systems Engineer	6–12	14–28	30–48	45–68	62–95	85–135
Firmware Engineer	7–13	15–30	32–50	48–72	65–100	90–140
Hardware Validation Engineer	6–12	14–26	28–46	44–66	58–90	80–130
VLSI / Chip Design Eng (ASIC)	NA	20–35	38–62	60–95	85–155	125–220
Physical Design Engineer	NA	18–32	34–58	55–88	78–130	110–195
GPU / AI Accelerator Designer	NA	25–42	45–75	70–115	100–175	150–280
Semiconductor FAB Ops Engineer	6–11	14–24	26–42	40–60	55–85	75–120
Test & Silicon Validation Eng	6–11	13–24	25–42	38–60	52–82	72–118

All figures ₹ LPA CTC · 25th–75th percentile · VLSI/GPU Design commands +45–75% premium · <500 VLSI specialists nationally · NA = atypical

SECTION 05

# WORKFORCE BEHAVIOUR

# 05

Attrition · Job-Switch Intent · Retention Drivers · 2025–26

## 5.1 ATTRITION OVERVIEW BY SUB-INDUSTRY

Overall attrition 16.2% (5-year low) but heavily segmented · 2025–26

**16.2%**

Overall IT Attrition

5-year low · Aon Survey 2025

**22–28%**

Mid-Level Attrition

4–10yr band · Peak risk

**25–30%**

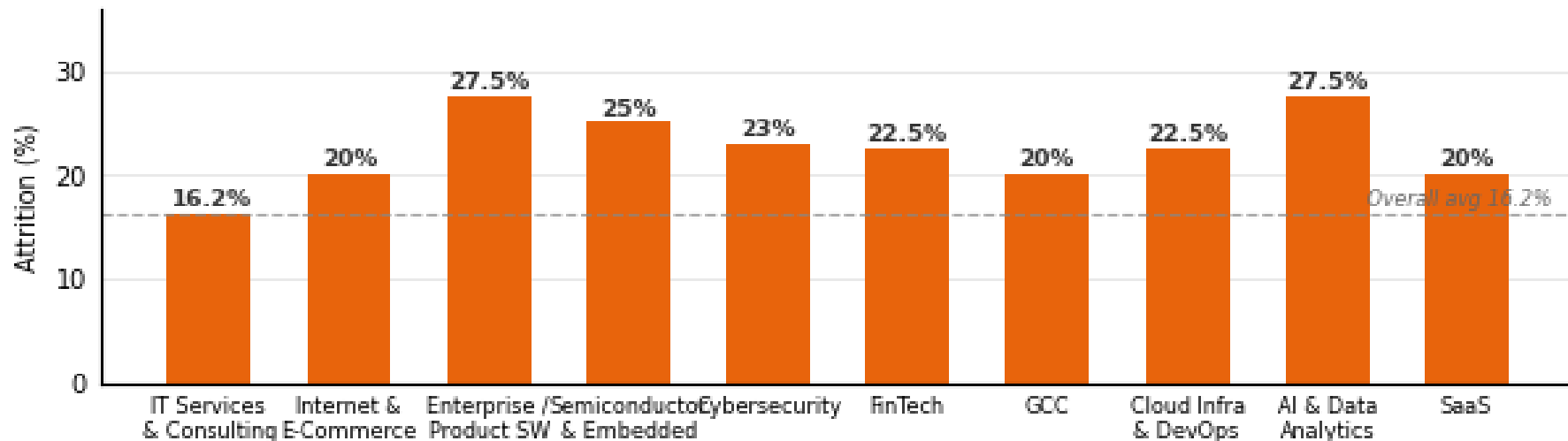
AI/SaaS Attrition

Highest sub-industries

**12–18%**

Leadership Attrition

Lowest segment



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