



Positioning India as the Talent Partner to the World

Unlocking Global Pathways and Circular Migration

September 2025

Executive Summary

Many of the world's high-income countries are experiencing rapid demographic changes. With population growth slowing down or in the negative already, many of these countries have to contend with an aging population and a declining labour force in the years to come. By 2030, these changes will manifest as a severe labour gap of 45–50 million workers. This gap, expected to further quadruple to 200–250 million by 2047, is concentrated in 20 countries—led by the United States and the United Kingdom, and joined by emerging labour-deficit economies such as Germany, South Korea, and Japan. Almost 50% of this gap is driven by blue-collar roles, including those undertaken by transport workers, industrial workers, sales professionals, and hospitality and care workers. While advancements in AI are leading to job displacements and helping mitigate the labour gap (primarily disrupting repetitive tasks, with the least impact expected on blue-collar jobs), they are also unlocking new roles and changing the skills required for existing jobs. In this context, circular migration has a key role to play in bridging the widening labour gap.

India is uniquely well-positioned to be a global talent provider in this backdrop, due to a combination of an advantageous demographic position and skilled white-collar workforce which lends it a strong starting position in overseas labour markets. India can double its annual overseas employment flow to 1.5 million by 2030—potentially increasing remittances by over 100% to USD 300 billion per year—by building a robust public and private ecosystem, cultivating a globally recognised and skilled workforce across both blue- and white-collar roles, and leveraging its existing English language advantage. There are, however, structural bottlenecks that must be addressed before India can benefit from the opportunity. These bottlenecks exist around demand generation, skilling and accreditation, recruitment processes and compliances, financing, and reintegration. Strategic interventions should include institutional frameworks at central, state, and embassy levels, financing innovations, recognition of Indian credentials abroad, and a stronger private sector role in international recruitment. It is India's time to act now. This moment presents a pivotal opportunity for India in the global talent landscape.

The report is a collaborative effort between the Global Access to Talent from India - GATI Foundation (a nonprofit launched by The Convergence Foundation, Manish Sabharwal and the Godrej Foundation in 2025 to act on this very opportunity) and Boston Consulting Group.



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Section 1

Global Talent Shifts: A Disguised Opportunity

By 2050, one in six people globally will be over the age of 65, up from one in eleven in 2019, according to the United Nations¹. This unprecedented demographic shift is reshaping labour markets dramatically. Already, in countries like Germany, Japan, and Russia along with 60 other countries, population has peaked as of 2024². And in the next 30 years, the total population of this group is projected to decline by 14%, as per UN World Population Prospects, 2024.

Declining birth rates and a shrinking workforce in developed nations have begun creating stark labour shortages, leaving millions of jobs vacant and businesses struggling. At the same time, aging populations will increase the need for healthcare and care workers. For instance, a report by the World Health Organization, published last year, pegs the healthcare worker shortage at approximately 11 million by 2030. In the US, for instance, there is a severe shortage of drivers, psychologists, and childcare workers. Similarly, in the EU, both white-collar professionals (e.g., psychologists, medical professionals, nurses) and blue-collar workers (e.g., drivers, cleaners, and cooks) are in short supply. In Germany, a critical shortage of caregivers means elderly residents must wait months for essential services, placing severe strain on the nation's healthcare system. Another common theme across the high-income countries is the growing need for skilled technical workers in areas such as housing (e.g., electrical system installation), infrastructure (e.g., road signal systems, fiber optics, satellites, construction of data centres) and clean energy (e.g., turbine maintenance, smart grids).

There is an enormous cost to this labour gap. A BCG Henderson Institute article, 2022 pointed out how labour shortages “are costing the world economy more than USD 1 trillion a year, or more than USD 3 billion a day.”³ Unfilled positions not only hamper business productivity but also increase operational costs of recruitment and training, and delay innovation.

Forecasts suggest high-income countries will see their collective demand for skilled workers increase dramatically - reaching a potential gap of 45-50 million by 2030, compared to roughly 5 million in 2023. While the influx of AI will displace repetitive

tasks, leading to substantial productivity gains, it will also change the nature of skill demand and accelerate the creation of many new roles and opportunities. Notably, AI is expected to have the least impact on blue-collar jobs (e.g., industrial, domestic, transport, and care workers).

There is a ballooning demand for skills, but where is the supply? In this evolving landscape, India finds itself at the cusp of a remarkable opportunity.



Section 2

India's Talent Advantage in an Aging World

Indian migrants (excluding internal migrants) constitute 1 to 1.5% of India's population, this is substantially lower than other competing countries such as Mexico (8.6%), the Philippines (5.1%), Bangladesh (4.3%), and Pakistan (2.5%). India has a lot to offer to solve the global labour gap crisis: it possesses a demographic edge, with a relatively young population. While the rest of the world is aging rapidly, India remains relatively young. Every year, it adds 10-12 million people to its eligible workforce, and this trend is expected to continue in the coming years.

But that's not the only aspect where India can add value. It has a thriving digital ecosystem, and a reputation as a credible global talent provider of white-collar workers. Indian workers are spread across the globe, engaged in a wide range of roles—from writing code as an IT professional in New York and caring for the elderly as a nurse in London, to driving a heavy-duty truck across Canada and helping build skyscrapers in Gulf countries. India's stock of migrant workers stands at around 8 million⁴ (excluding permanent residences, green card holders and students), and every year, another 700,000-plus embark on journeys overseas as migrant workers. And, yet India's share of global migrants (6%)⁵ is still significantly lower than its share of the world population (18%).

India's relations with host countries are deep and well-structured. As of 2024, India has signed 21⁴ labour mobility and/or labour welfare agreements, solidifying its place as a reliable partner. In the US, the UK, Canada, and the Gulf, a remarkable 20% to 30% of work visas issued each year land in Indian hands. And in 2023, India held the largest share of the coveted EU Blue Card (24% of all cards issued)⁶ – an indication of where Europe is looking to fill its talent gaps. Beyond these, India's workforce has earned a reputation for specific roles (e.g., nurses from Kerala).

Another key factor is language. In a world that increasingly communicates in English, urban India has a built-in advantage. India's workforce can seamlessly integrate into Anglophone destinations like the UK, the US, Canada, and Australia, countries that already attract a significant number of its migrants. In addition to that, efforts to build foreign language capabilities are underway, with pilot programmes introducing German, Japanese, and French in Indian schools.

Currently, Indian workers abroad send back approximately USD 130 billion per year in remittances⁷. If India seizes this opportunity, the number of workers migrating abroad for jobs could double to 1-1.5 million a year by 2030, and remittances could rise to USD 300 billion per year.

Where exactly is this immense opportunity? It's concentrated, both geographically and in terms of skills.



Section 3

Mapping the Advantage

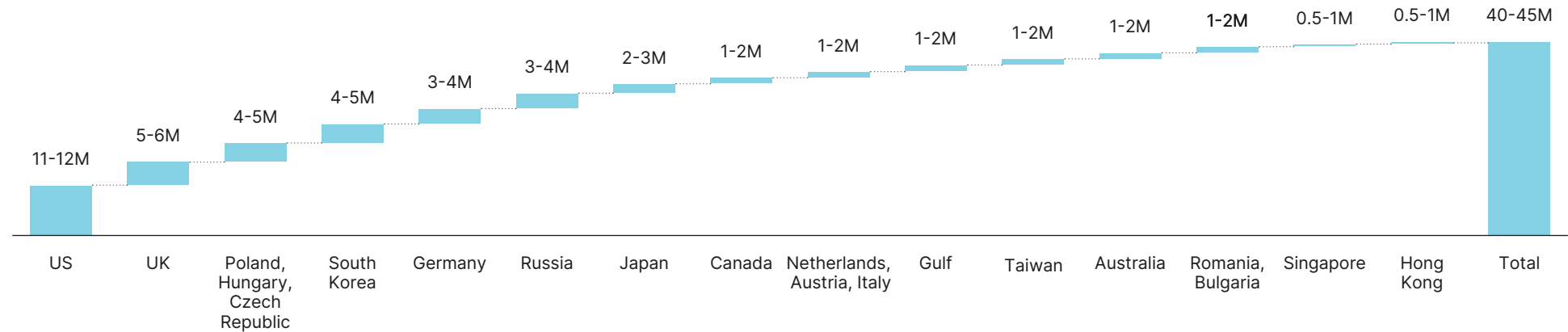
Just 20 countries will drive 90% of the global labour gap. The US and UK alone are estimated to account for a whopping 40% of the demand by 2030, places where Indian migrants already have a deep-rooted presence. Then there is Eastern Europe and Russia, a moderate but growing frontier.

Finally, economies like Japan, South Korea, and Germany, which have historically been closed to large-scale migration, are now opening, driven by their aging populations. This is a nascent opportunity.

Exhibit 1: Concentration of global labour gap (top 15 regions)

Labour Gap

Projected gap between labour demand and supply by 2030



Note: Gulf countries include Bahrain, Oman, Qatar, United Arab Emirates, Saudi Arabia, Kuwait.

From a skills point of view, half of this gap will be in blue-collar roles (such as industry workers, transport drivers, domestic help, hospitality staff, and care providers). These are roles that are less susceptible to being offshored and less impacted by AI. Another 20% of the gap, approximately, will be in key service roles, such as nursing, teaching, and clerical positions. The remaining 30% of the gap will be in white-collar jobs, such as ICT and managerial roles. India already has a strong foothold in these areas in the US and the UK. These roles, however, may face pressure from offshoring.

Another way to view the emerging global labour gap is through the lens of India's existing strengths. We are talking about three distinct sets of opportunities here:

Firstly, in markets such as the US, UK, and Singapore, Indian talent is already well-established in white-collar roles. Jobs related to information and communication technology, business and professional services, and engineering remain in high demand, and these are areas where Indian professionals are both welcome and proven. The demand for such roles continues to be high and India can work toward sustaining its advantage. However, given the tightening immigration regimes in the US and UK, the return on effort in these geographies is likely to be diminishing. Hence, the responsibility for sustaining such pathways should rest with the private sector, while the public sector can focus on areas where market failures persist or where there is a clear need for state support—for example, nursing, teaching, and medicine (doctors), which require country-specific accreditations. Opportunities for India's blue-collar workers, especially agricultural sector in the US will be relatively limited and should be deprioritized. This is because, for such roles, the US is expected to favour workers from neighboring countries such as Mexico.

Secondly, the Gulf countries and Canada already host significant Indian diasporas and rely on Indian labour in critical sectors. Blue-collar jobs in the Gulf—particularly in construction, maintenance, and logistics—continue to present large-scale opportunities. But with regional priorities evolving, the recent focus of Middle Eastern

countries on technology and digital services is opening the door for Indian tech and business professionals as well. In these areas, Indian workers have established strong credibility. Hence, these are regions where India must build on adjacencies.

Thirdly and finally, economies such as Japan, South Korea, Taiwan, and parts of Europe are only now beginning to open their labour markets to foreign talent in a structured manner. These are the nascent opportunities, and India can position itself well in advance. Japan, for example, is showing increasing openness to skilled blue-collar roles in manufacturing and infrastructure, particularly through bilateral agreements. In 2021, Japan signed a Memorandum of Cooperation with India on Specified Skilled Workers (SSW), a relatively new status of residence created by Japan, allowing 14 categories of Indian skilled workers to work in that country. There is also a growing demand for healthcare workers, especially nurses, driven by Japan's aging population. Eastern European countries such as Poland, Romania, Hungary have shown strong demand for roles like industry, transport & domestic workers, clerical services, and sales professionals.

Yet, this window of opportunity is narrow, and the competition is fierce. Countries such as the Philippines, Indonesia, Egypt, and Vietnam are actively involved, each eyeing to secure a significant portion of this global market.

India's approach to tapping this opportunity needs to begin with an understanding of what the average Indian experiences in their journey to becoming an overseas migrant worker. The following section examines this from the perspective of nurses, whose experience largely mirrors that of millions of aspiring Indian workers across professions.

Section 4

The Migrant Worker's Journey

The path to overseas employment has significant challenges today (Refer to Exhibit 2). For instance, across India, thousands of nurses graduate each year, even as countries like the UK, Canada, and Australia look for trained healthcare workers.

To start with, in many states outside Kerala, Tamil Nadu, and Karnataka, nurses lack access to reliable information about overseas opportunities. Those who are aware and persist soon realise the challenge of certification is upon them, and these certifications aren't based on just subject matter knowledge but also on language proficiency. Each host country has its own requirements. So, it is NCLEX-RN for the US, PTE for Canada, CBT and OSCE for the UK. A language proficiency test such as IELTS adds to the mix. To add to the complexity, in the US, every state has a different certification requirement, which is to be chosen while applying for NCLEX.

Securing these certifications is both costly, ranging from INR 1 to 3 lakh (USD 1,200 to 3,600), including training and exam fees, and challenging, frequently requiring specialized coaching. Indian training often lacks exposure to advanced medical equipment or specialty rotations, leaving many nurses underprepared for these exams. Even after passing the tests, nurses must register with the regulatory bodies in their host countries. Each has its own process, and delays in getting certificates from Indian nursing institutions are common, derailing overall timelines. The next challenge is the interview stage, where Indian nurses often struggle due to limited preparation—stemming from the absence of formal bridging courses and a misalignment between the Indian nursing curriculum and international requirements. Worse still, employment gaps of more than a year are not appreciated by recruiters abroad. Nurses also find that the UK, Canada, and the Gulf countries are often easier alternatives compared to the US, which requires a longer immigration process and greater compliance, even though this means accepting restrictive contractual clauses. One such clause imposes financial penalties on the nurses if they leave the job within a particular time.

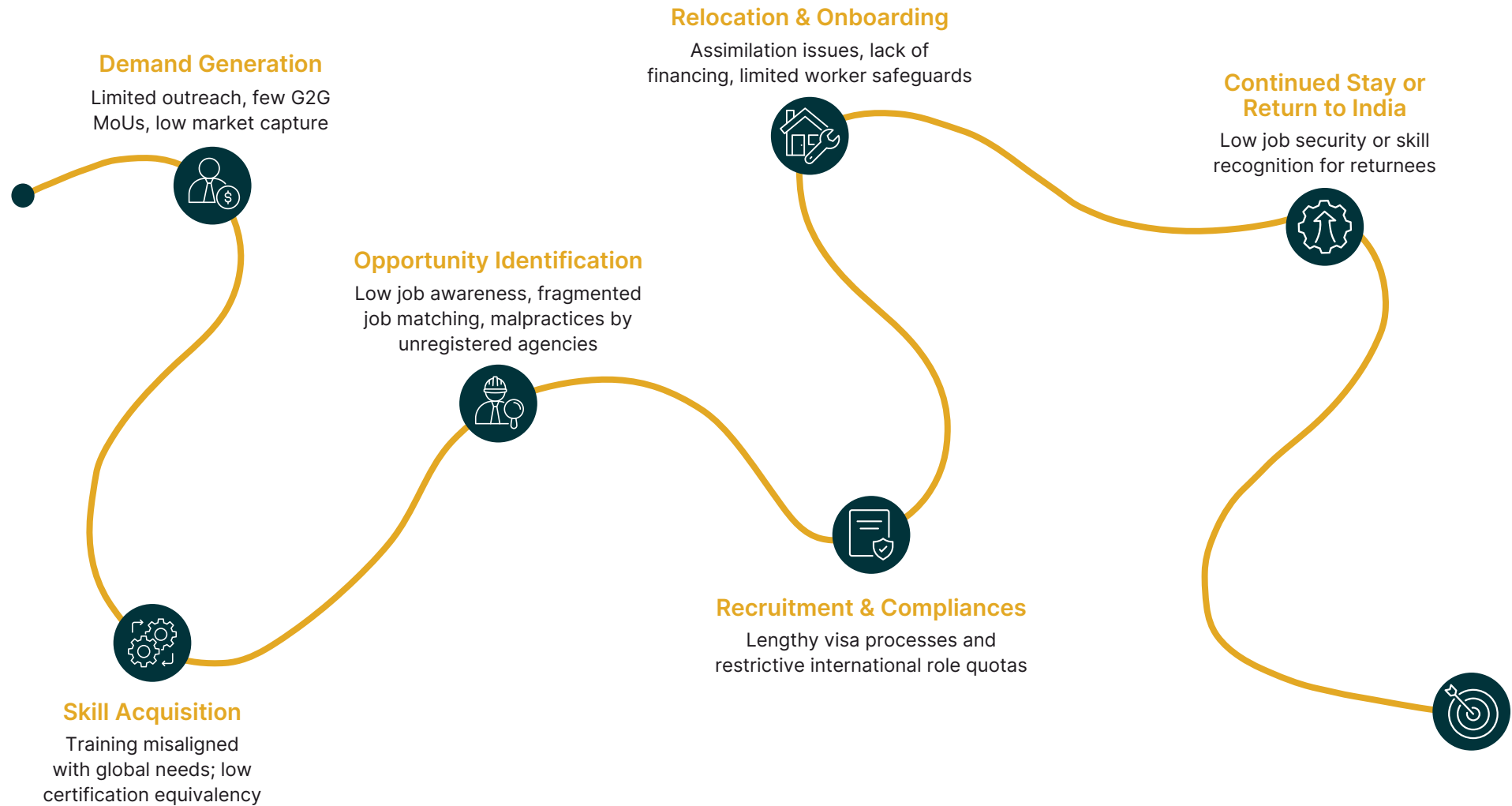
Getting a job is a significant milestone, yet the challenges do not end there. Immediately upon employment, individuals often face demanding paperwork and

administrative requirements. And with India's state-specific councils and two-tier approval system, delays aren't uncommon. Then, visa backlogs and work permit applications can significantly delay the entire process. As of 2024, this could take anywhere from 12 months for the US, to 5-6 months for Canada. Finally, relocation is rarely smooth, as a lack of cultural orientation and language skills can affect the effectiveness of nurses in their jobs.

At a personal level, all of this is a struggle. But at a macro level, this highlights the gaps that exist in India's approach to tapping an opportunity as big as this. While the example above was of nurses, the whole 'awareness-to-relocation' lifecycle fits the journeys of millions of Indian workers who aspire to get employed overseas.



Exhibit 2: Challenging lifecycle of an Indian overseas migrant worker



Section 5

A Blueprint for Talent Leadership

The friction in the process seen above for a nurse or any worker from India arises from a variety of reasons—from poor awareness about overseas opportunities and mismatched accreditation standards, to limited financing and the absence of a coordinated ecosystem. To address this, we have identified eight interventions on both the demand and supply sides of the equation, that India must simultaneously act on. On the demand side, it must build partnerships with destination countries to generate large-scale job orders and remove regulatory hurdles. On the supply side, the focus must be on preparing the Indian workforce—through relevant skills, accessible finance, and structured support mechanisms.

Strengthen central, state, and regional institutional frameworks

A foundational step involves building a three-tier institutional framework at the central, state, and embassy levels. At the central level, a three-pronged department that could drive policy, promotion, and research can be established. This could include separate wings for managing government-to-government partnerships, branding India as a global talent hub, and generating data-driven insights on global job trends. State level departments could provide additional push – to facilitate documentation, pre-departure orientation, oversee worker welfare, and for accreditation alignment, targeted skills-building programmes, including language and communication training. Embassies in destination countries could further strengthen this framework by promoting Indian talent, facilitating employment processes, and ensuring migrant welfare abroad through diaspora engagement and support.

The Philippines, for example, has been successful in facilitating circular migration, with a strong presence in the nursing and blue-collar roles (e.g., factory operators, technicians, trades, sales) through a three-tier framework. At the central level, the responsibility rests with the Department of Migrant Workers, while 16 state regional offices and 39 Migrant Workers Offices in 28 destination countries complete the three tiers. 65+ G2G agreements and 3,400+ registered agencies enable overseas

placement through mutual recognition of skills and worker protection. Government-run job portals ensure safe and accredited access to overseas employment. Within this ecosystem, the Overseas Workers Welfare Administration (OWWA) provides financial aid, skilling and reintegration support. The Philippine Association of Service Exporters supports policy advocacy and drives training and capacity building. The Philippines, with a stock of 2.2 million migrant workers, has an extensive history in labour migration and thus, a good example for India to follow. Its remittances contribute to 8.3% of its GDP in 2024 (India, in comparison, is at approximately 3%).

Establish best practices for G2G mobility agreements

Equally critical is the need to reimagine how India negotiates labour mobility agreements. While India has signed 21 such agreements, future agreements must address visa bottlenecks, socio-cultural integration, and qualification recognition. Several Indian agreements include provisions that benefit our workforce – for instance, partnerships with Germany and Australia feature robust joint vocational training components, while the agreement with Japan emphasizes strong socio-cultural integration. However, areas such as mutual recognition of skills, reintegration measures, and implementation monitoring remain underdeveloped and present opportunities for improvement.

Align accreditation across India and destination economies

The challenge of differences in accreditation requirements across India and the host countries needs to be solved, which prevents migrants from securing jobs that align with their experience and expertise. For instance, Vietnam has made significant efforts to internationalize its higher education system, with 62 universities currently offering transnational education programmes, spanning business, finance, accounting, administration, management, science and technology, pharmacy, and law, in partnership with foreign institutions.

Create innovative financing models for migrant workers

Financing the migration journey is another significant barrier. Costs can range from INR 1 to 2 lakh (USD 1200 to 2,400) for Gulf placements to INR 5 to 10 lakh (USD 6,000 to 12,000) for Europe, covering training, testing, documentation, and relocation. Most aspiring migrants lack collateral or access to formal credit. Innovative financing tools—such as credit guarantee schemes, bridge loans, and migration-linked insurance—can be scaled. India can adopt best practices from existing exemplars such as the Philippines' Employer Staffing Agency-Pay model, where employers or licensed recruitment agencies cover pre-departure expenses like visa fees, airfare, medical exams, training, and documentation for migrants.

Build a mobility industry body

'Talent India', a body that can serve as the voice of India's overseas recruitment sector, facilitate collaboration between the government and the private sector, and promote success stories, can be established. This will help assuage employer skepticism. In addition to existing platforms such as FIMCA (Federation of Indian Emigration Management Councils and Associations), new mobility bodies can be established to represent the emerging global skills mobility industry, bringing together the broader ecosystem stakeholders apart from recruitment agencies, such as language training institutes, visa service providers, migrant - loan providers.

Strengthen welfare norms to safeguard worker interests

It is also important to place worker welfare at the centre of India's approach. India's existing regulations already provide a solid foundation for protecting migrants, and these can be further strengthened by drawing on international best practices. For instance, Mexico's interdepartmental migration framework — which integrates worker training, documentation, and health screenings — offers useful lessons that could be adapted to the Indian context.

Facilitate the reintegration of returning migrants

A natural extension of the concern for worker welfare is to recognise that when they return home, they need support to reintegrate. And this needs to include access to jobs, matching their skills, recognition of overseas experience, and support for entrepreneurship. Telangana's plans to establish a state-level resource centre for migrant's reintegration with the support of International Labour Organization offers a starting point. Kerala's NORKA Roots has implemented several initiatives for returnees, including NORKA-Roots Assisted and Mobilized Employment (NAME), assuring employment assistance and entrepreneurship support. Replicating such a model across other states would maximize the benefits of return migration nationwide.

Strengthen the private recruitment ecosystem

Finally, India should attract greater participation from the private sector across the entire international employment value chain. It can accelerate India's efforts towards expanding our global presence by addressing key barriers and creating innovative solutions in language training, skilling and financing. The Philippines is a strong example, with 3,400+ registered private recruitment agencies supporting ethical migration – and multiple agencies sending 20,000-40,000 people annually.

India's efforts to streamline its talent pipeline, with support from both public and private interventions, are key to transforming a worldwide challenge into a monumental opportunity for itself.

Exhibit 3: India's time to act is now

India's 2030 Opportunity



1-1.5M

Net overseas employment flow – **1.5-2x of current flows**



\$300B

Potential inward remittances per year – **4-5% of Indian GDP**
(vs 3% today)

Other Strategic Advantages



Build winners in India

Replicate ITeS like success stories in healthcare, green skills/EV, and domestic workers



Geostrategic partner

Position India as a trusted global circular migration partner



India as global talent brand

Strategic powerhouse in key roles (e.g., manufacturing) & new areas (e.g., care workers)



8 Key areas to accelerate India's overseas employment growth



1. Strengthen central, state, and regional institutional frameworks



2. Establish best practices for G2G mobility agreements



3. Align accreditation across India and destination economies



4. Create innovative financing models for migrant workers



5. Build a mobility industry body



6. Strengthen welfare norms to safeguard worker interests



7. Facilitate the reintegration of returning migrants



8. Strengthen the private recruitment ecosystem

Conclusion

India has a unique opportunity to become the global talent hub as high-income countries face an accelerating labour shortage. The gap will grow ten times from 2023 levels to reach about 50 million. India is well-poised to double its overseas employment flow to 1.5 million, and more than double remittances as a result. But it needs to act. While its large working-age population, recognised skill base, and established relations work for it, India needs to unblock several structural bottlenecks that could slow it down. India needs to convert this moment to its advantage, as its demographic dividend won't last forever.

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About GATI Foundation and BCG

GATI Foundation

GATI Foundation is a non - profit that aims to unlock global labour mobility for Indians by building scalable and circular migration pathways through a collaborative ecosystem of governments, businesses, and nonprofits.

GATI Foundation's vision is to position India as a Global Talent Hub. To bring this aspirational vision to life, three strategic pillars of action have been identified. Firstly, building institutional capacity across all levels of government - central, state, and even regional international desks, to systematically support and streamline overseas employment pathways. Secondly, energizing India's startup and entrepreneurship ecosystem to build more international mobility organisations. Lastly, conducting targeted pilots to test innovative models - particularly in areas like financing, skilling, certification, and worker support - to identify scalable solutions that can be replicated and adopted at larger level.

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