

The AI Workforce Advantage



Jobs, Skills and Workforce
Readiness in India: Insights from
345 Workers, Students, Employers,
HR Leaders and Policymakers





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AI
Economy
India

Foreword

Ms. Charu Malhotra

Co-Founder & Managing Director
Primus Partners



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Artificial Intelligence (AI) is rapidly emerging as one of the most transformative technologies of our time. Across industries, governments, and societies, AI is reshaping the way work is performed, decisions are made, and value is created. While global discourse often focuses on the risks of widespread job displacement, the reality unfolding in India appears more nuanced and more consequential.

This report seeks to move beyond speculation and contribute evidence to the ongoing debate on AI and the future of work. Combining extensive secondary research with primary insights from 345 stakeholders - including employees, students, founders, HR leaders, and policymakers. This report examines how AI is affecting workforce dynamics in India and what actions are required to ensure an inclusive and productive transition.

The findings challenge many commonly held assumptions. Contrary to narratives of immediate largescale job loss, the evidence suggests that AI is primarily transforming tasks within jobs rather than eliminating jobs altogether. The impact is being felt through changing skill requirements, evolving productivity expectations, and widening differences between workers who are able to leverage AI and those who are not.

Three messages emerge clearly from this research.

First, AI is becoming a foundational workplace capability. Workers who effectively use AI tools are already experiencing productivity and career advantages, while organisations increasingly expect AI familiarity from both existing employees and new hires.

Second, the greatest workforce risk is not displacement, but preparedness. Educational institutions, training systems, and workforce development mechanisms are struggling to keep pace with rapidly changing employer expectations. Without accelerated investment in skills development, existing inequalities may deepen.

Third, India has a significant opportunity to position itself as a global leader in the AI economy. With one of the world's largest and youngest workforces, a thriving digital ecosystem, and increasing public and private sector investment in AI, the country is well placed to harness the benefits of this technological transition. However, realising this opportunity will require coordinated action across government, industry, academia, and civil society.

The purpose of this report is not merely to assess the impact of AI on work today, but to identify the actions required to build a workforce that is prepared for the future. The choices made over the next few years will determine whether AI becomes a force for broad-based economic opportunity or a source of widening workforce inequality.

India's AI future will ultimately be shaped not by technology alone, but by our collective ability to prepare people to work alongside it.

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Executive Summary



Artificial Intelligence has become one of the defining forces shaping the future of economies, industries, and societies. Across the world, debates on AI and employment are often dominated by concerns about large-scale job displacement. Yet, for India - with the world's largest youth population, a rapidly digitising economy, and ambitions to become a global AI leader - the more important question is not whether AI will eliminate jobs, but how it will transform work itself. This report was developed to cut through the noise surrounding AI and employment. Rather than relying on speculation, it combines extensive primary and secondary research with insights from 345 stakeholders, including employees, students, founders, HR leaders, policymakers, and academic experts. Its objective is to understand how AI is reshaping workforce dynamics in India and to identify the actions required to ensure that technological progress translates into economic opportunity.

The findings challenge some of the most widely held assumptions about AI and employment. The findings suggest that India is not witnessing a job-level disruption, but a Task-Level Revolution. Across industries, AI is reshaping the fundamental unit of work - the task - rather than eliminating jobs altogether. Routine activities such as documentation, reporting, data processing, and content generation are increasingly being automated, while human contribution is shifting towards judgment, creativity, collaboration, and decision-making.

Nearly 68% of employees surveyed reported that AI assists them in specific tasks, while only 3% indicated significant changes to their overall role. Employers largely reinforce this perspective. An overwhelming 97% of founders stated that AI-enabled employees outperform their peers, while 82% reported significant improvements in productivity and reductions in execution time. Taken together, these findings point to a clear conclusion: AI is augmenting work far more rapidly than it is replacing it.

However, the report also identifies a more pressing challenge. The greatest risk facing India's workforce is not job displacement - it is the emergence of a widening Workforce Divide between those who can effectively leverage AI and those who cannot.



Workers who actively use AI tools are already gaining advantages in productivity, visibility, and career progression. These benefits compound over time, creating a growing gap between AI-enabled workers and those without access to the tools, training, and support required to adapt. The transition is therefore not merely technological; it is increasingly becoming a question of capability, preparedness, and access to opportunity.

This challenge is particularly significant in the Indian context. India ranks third in Stanford University's 2025 Global AI Vibrancy Ranking, reflecting its emergence as one of the world's leading AI ecosystems. Yet the research reveals a striking Readiness Paradox: while the country performs strongly on global measures of AI adoption and innovation, workforce preparedness is struggling to keep pace with the rapid evolution of employer demand. Only 15% of students surveyed feel highly prepared for AI-driven workplaces, while 41% of employers identify AI-related capabilities as the largest skills gap among new hires. In effect, India is generating demand for AI talent faster than it is producing supply.

The implications are amplified by India's demographic realities. Every year, approximately 7–8 million young people enter the labour market. At the same time, many of the entry-level tasks that historically served as pathways into professional careers—basic analysis, documentation, administrative support, and routine knowledge work—are becoming increasingly automated. This does not eliminate opportunities altogether, but it changes the nature of workforce entry and raises the bar for employability. For India, AI is acting as a Time Accelerator, compressing workforce transitions that historically unfolded over decades into just a few years. The result is an urgent need to prepare workers, institutions, and employers for a pace of change unlike anything seen before.

The research also highlights a critical governance gap. While AI adoption is accelerating across organisations, the policies and frameworks required to manage its responsible use are not evolving at the same pace. Only 29% of organisations surveyed have established comprehensive AI governance frameworks, despite 71% of employees indicating that workplace AI policies are important. As AI becomes embedded in everyday workflows, building trust, accountability, and responsible governance will be as important as investing in the technology itself.



Taken together, the findings point to three structural shifts that will define the future of work. First, value is moving from Execution to Judgment, making critical thinking, validation, contextual understanding, and problem framing increasingly important. Second, competitive advantage is shifting from Access to Capability; success will depend less on possessing AI tools and more on the ability to integrate them effectively into workflows and decision-making processes. Third, career progression is moving from Linear to Uneven Growth, with adaptability, learning agility, and AI fluency becoming stronger predictors of advancement than tenure alone.

These shifts require coordinated action across government, industry, and academia.

For government, workforce readiness must be treated as a national competitiveness imperative. The report recommends establishing a National AI Workforce Transition Programme, expanding access to affordable reskilling through AI Learning Credits, and developing AI skilling hubs in Tier-2 and Tier-3 cities to ensure opportunities are distributed more equitably across regions.

For industry, the priority is to move beyond viewing AI solely as a cost-reduction tool. Organisations should adopt Redeployment-First workforce strategies that prioritise reskilling and talent mobility before workforce reductions, link AI capability development to career progression, and establish clear governance structures to guide responsible AI adoption. The organisations that successfully combine technology investment with workforce development will be best positioned to capture long-term productivity gains.

For educational institutions, AI literacy must become a foundational competency across disciplines rather than remaining confined to computer science and engineering programmes. Universities and training providers must integrate AI-enabled learning, industry-led projects, apprenticeships, and stackable credentials into mainstream curricula to better align graduate capabilities with labour market needs.

India enters the AI era with real structural advantages: a young workforce, a thriving digital ecosystem, and a top-3 global position in AI vibrancy. But advantages don't automatically become outcomes. The decisions taken over the next three years on workforce development, reskilling, and governance will determine whether AI drives India's next wave of growth or deepens its workforce divide. India's AI future will be shaped not by technology alone, but by how well its institutions, businesses, and educators prepare people to work alongside it. The opportunity is immense and so is the urgency.

AI is central to the India's Viksit Bharat vision. Whether India becomes a developed, high-income economy by 2047 will depend, in no small part, on what it does with AI in the coming years.



01

AI: The Great Workforce Reset

Why this time is different?

1.1 | The AI Workforce Transition

Every major technological revolution has transformed work.

The Industrial Revolution mechanised physical labour. The internet digitised information. Artificial Intelligence is the first technology capable of augmenting cognitive work at scale.

The debate around AI is often framed as a question of job creation versus job destruction. That framing misses the bigger issue.

The defining challenge of AI is not whether jobs will disappear or emerge. It is the speed at which labour markets, education systems, businesses, and governments must adapt.

Previous workforce transitions unfolded over decades, allowing institutions time to adjust. AI is compressing that transition into a matter of years.

For India, this presents both a historic opportunity and a significant challenge. With one of the world's youngest workforces and a rapidly expanding digital economy, India is well-positioned to benefit from AI-led growth. Yet many of the occupations that have traditionally provided pathways to middle-class employment are among those most exposed to AI-driven transformation.

The question is no longer whether AI will reshape work.

The question is whether workers and institutions can adapt fast enough.

 INDICATOR		 ESTIMATE
	New jobs projected globally by 2030	170 million
	Roles facing displacement by 2030	92 million
	Share of global jobs exposed to AI impact	40 %
	Employers expecting AI to transform business operations	86 %

Table 1. At a Glance: The Scale of the AI Workforce Transition

1.2 | The Global AI Workforce Shift

AI is already changing how work is organised across the global economy. Rather than replacing entire occupations, AI is increasingly transforming individual tasks within occupations. Routine, rules-based activities are being automated, while demand grows for analytical, technical, supervisory, and human-centred capabilities.

 Sector	 AI-Driven Changes	 Emerging Demand
 Banking & Financial Services	Automated processing, fraud detection, AI-enabled customer support	AI risk analysts, compliance specialists, data analysts
 Manufacturing	Predictive maintenance, robotics integration, quality monitoring	AI technicians, robotics operators, process engineers
 Logistics & Supply Chain	Route optimisation, demand forecasting, inventory planning	Supply-chain analysts, AI operations managers
 Retail & E-commerce	Personalised recommendations, inventory automation	Data planners, digital commerce specialists
 Professional Services	AI-assisted research, documentation, workflow automation	AI governance specialists, prompt engineers

Table 2. This shift is visible across sectors

The impact is not uniform. Global labour-market assessments estimate that nearly 40 per cent of jobs worldwide will be exposed to AI-driven transformation.

Workers engaged in repetitive, process-driven activities face the highest exposure to automation. Conversely, **demand is rising for workers who can build, manage, govern, and collaborate with AI systems.**

At the other end of the spectrum, occupations that depend heavily on empathy, judgment, creativity, interpersonal trust, and physical dexterity remain comparatively resilient.



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For sectors like animation, gaming, and immersive media, AI is a force multiplier. It lowers barriers to entry, democratizes content creation, and opens global opportunities for talent from countries like India.

**Ashish Kulkarni, Chairman, FICCI AVGC-XR Forum,
Founder, Punnyug Artvision Pvt Ltd**

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 High Risk	 Medium Risk	 Lower Risk	 Protected
● Data entry clerks ● Admin secretaries ● Bank tellers ● Call centre agents (L1) ● Payroll processors	● Junior software developers ● Content writers ● Market researchers ● Financial analysts (entry) ● HR coordinators	● AI/ML specialists ● Cybersecurity experts ● Prompt engineers ● AI governance officers ● Data storytellers	● Therapists & counsellors ● Teachers & mentors ● Emergency responders ● Senior strategists ● Creative directors
<i>Rules-based, repetitive, structured data tasks - 85%+ automatable</i>	<i>Mixed cognitive and routine -AI augments; role restructures significantly</i>	<i>Design, govern, and direct AI systems - demand rising fastest</i>	<i>High empathy, unstructured judgment, physical dexterity -AI cannot replicate</i>

Table 3. Workforce Exposure Spectrum

Source: WEF Future of Jobs Report 2025;

Global assessments suggest that AI will simultaneously create and displace jobs on a large scale.

While overall employment effects may remain positive, the transition will not be evenly distributed. Countries with stronger digital infrastructure, more agile education systems, and higher AI adoption capabilities are likely to capture a disproportionate share of the gains.

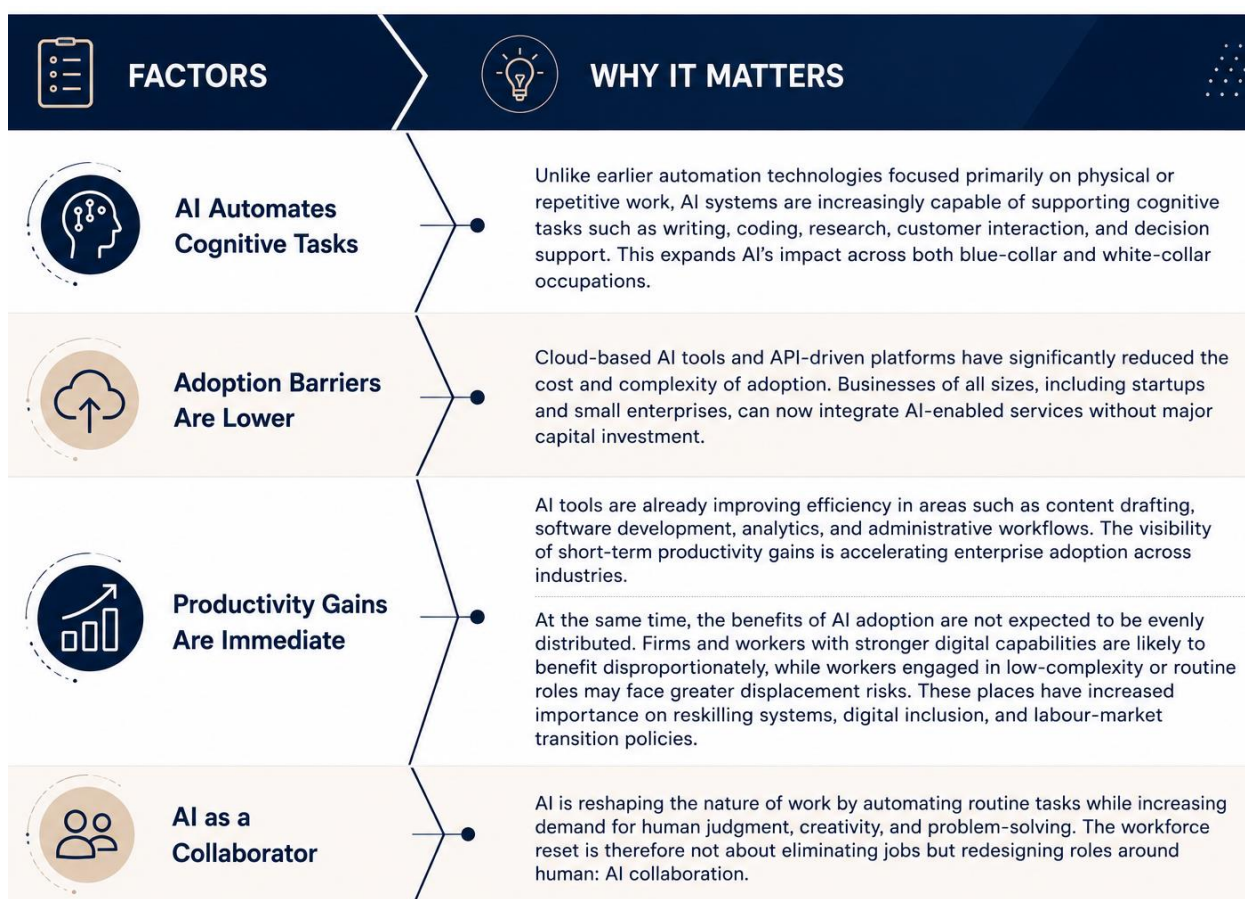
This creates an increasingly important policy challenge.

Without large-scale workforce adaptation, AI adoption could widen existing productivity gaps, deepen wage inequality, and accelerate labour-market polarisation.

1.3 Why This AI Transition Is Different

Every technological revolution changes work.

AI differs because it changes the nature of work faster than institutions can adapt.



1.4 | India’s Workforce Opportunity and Risk

India enters the AI era with several structural advantages.

The country possesses one of the world’s youngest labour forces, a globally competitive technology-services industry, rapidly expanding digital infrastructure, and strong public digital platforms. These advantages position India to become a significant participant in the global AI economy.

AI could increase productivity across manufacturing, services, healthcare, logistics, education, and public administration. It is also expected to create demand for entirely new occupations in areas such as AI engineering, cybersecurity, advanced analytics, AI operations, and AI governance. Yet the risks are equally significant.

Many of India’s largest employment-generating sectors rely heavily on routine and process-oriented work. Customer support, business-process management, clerical operations, and administrative services are among the occupations most exposed to AI-driven restructuring.

Several government initiatives, including digital skilling and workforce development programmes, have already begun aligning training systems with emerging technology requirements. However, the pace of AI adoption is likely to require significantly larger investments in reskilling, digital literacy, and industry-aligned training systems.

India’s long-term success in the AI economy will depend on how effectively it prepares its workforce for technology-driven change. Investments in AI-enabled education, digital infrastructure, workforce transition support, and inclusive labour-market policies will be critical to ensuring that AI adoption contributes to broad-based economic growth and employment generation.

 Opportunity	● Expansion of AI-enabled experts ● Growth in AI and digital occupations ● Productivity gains across sectors ● Increased digital entrepreneurship ● Higher demand for advanced technical skills	 Risk	● Displacement of routine service roles ● Large-scale skill gaps ● Wage polarization ● Uneven access to reskilling ● Regional disparities in digital readiness
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Table 4. India’s AI Equation

The background of the slide is a dark blue field filled with a complex, interconnected network of thin, light blue lines. These lines connect numerous small, glowing dots, which are primarily light blue but include some orange and yellow ones, creating a sense of dynamic energy and digital connectivity.

02

The Indian Imperative

Why AI Disruption Is Different in India?

India's AI challenge is fundamentally different from that of most advanced economies.

Many developed nations face ageing populations and shrinking workforces. India faces the opposite reality.

Every year, millions of young people enter the labour market seeking pathways to economic mobility.

For decades, white-collar services, IT outsourcing, business-process management, and customer support provided those pathways.

Today, many of those same occupations sit at the centre of AI disruption.

The escalator to prosperity is being redesigned while millions are still standing on it.

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“As AI evolves from assistive tools to agentic systems and ultimately physical intelligence, it will fundamentally reshape work, jobs, and industries. In this new era, the defining factor of success will be human readiness as individuals will need the skills, adaptability, and judgment to collaborate effectively with increasingly capable AI systems. Investing in AI skills is therefore essential to strengthening economic resilience, expanding opportunity, and reinforcing technological sovereignty.”

Shweta Khurana, Sr. Director - Asia Pacific & Japan, International Government Affairs

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Table 5: India's Workforce Reality

Before AI arrived, India's labour market was already under pressure.

A university degree no longer guarantees employment.

Graduate unemployment remains substantially higher than among less educated workers, while a significant share of graduates work in jobs that do not require their qualifications. AI is entering an already stressed system.

2.1 Two Structural Blind Spots: Geography and Gender

The AI transition in India is not evenly distributed. Two fault lines define who bears the risk and who captures the opportunity.

Geography:



Only 5.8% of India's white-collar job listings currently require AI expertise (World Bank, Oct 2025), and the vast majority are concentrated in what the analysts have termed the technology corridors - Bengaluru, Hyderabad, Chennai, and Pune – along with Mumbai and NCR. This means that AI-enabled employment is being created in precisely the regions that already have the highest digital infrastructure, education quality, and employer ecosystems. The states that most need new employment pathways – Bihar, Uttar Pradesh, Madhya Pradesh, Jharkhand and the Northeast – are simultaneously the least positioned to benefit from AI-driven job creation.

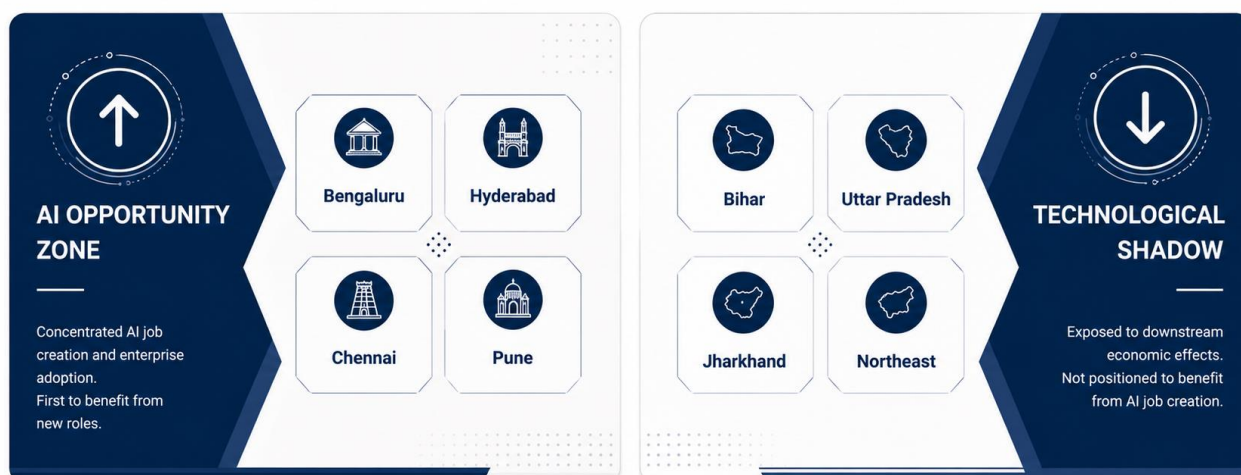


Table 6: AI Opportunity Zones and Regions at Risk

Gender



Young women face a compounded disadvantage. As the table below shows, the gender gap widens significantly with education level - female graduates face unemployment rates nearly 8 percentage points higher than male graduates.

EDUCATION LEVEL	MALE	FEMALE	GENDER GAP
 Secondary education or above	17.5%	21.4%	+3.9 pts ↑
 Graduates	26.4%	34.5%	+8.1 pts ↑
 NEET Not in employment, education or training	9.8%	48.4%	+38.6 pts ↑

Note: Female NEET rates reflect both labour market and social barriers to workforce participation.

Table 7: Gender Gaps in Youth Employment Outcomes

The automation of entry-level white-collar roles - call centres, data processing, administrative work - disproportionately threatens the jobs where women first gained formal employment in India's economy.

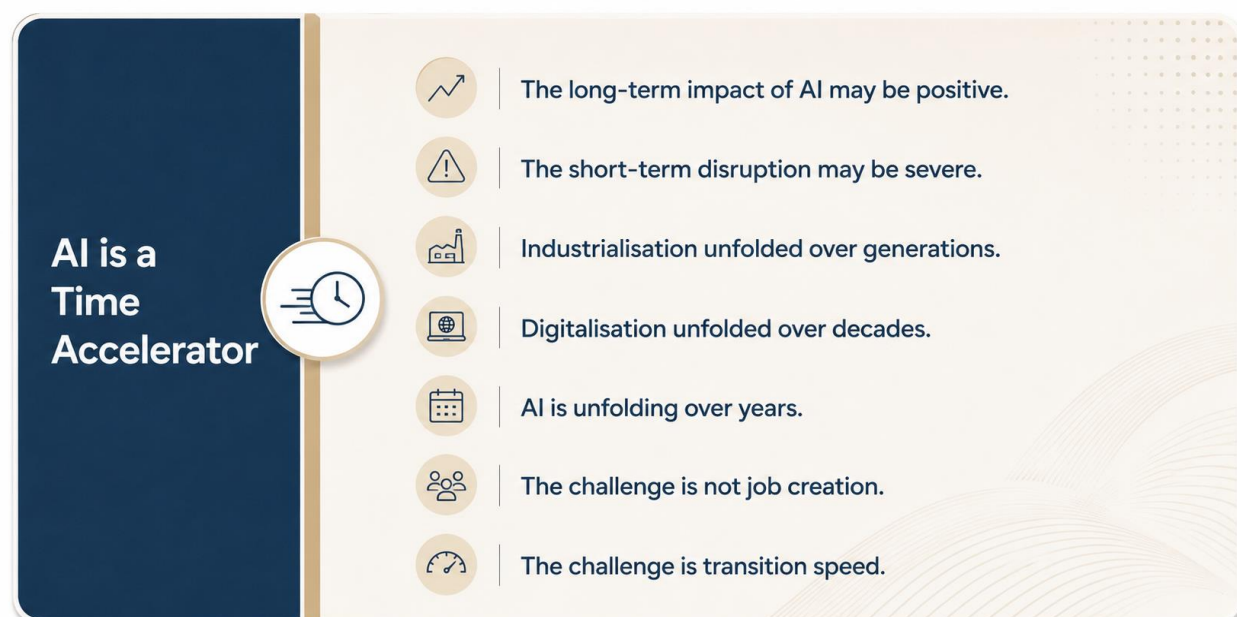
2.2 Two Narratives, One Urgent Truth

When AI and employment are discussed, two opposing narratives dominate. Neither tells the full story.

Catastrophism: AI Will Destroy Jobs at Scale	Techno-Optimism: AI Will Create More Than it Destroys
68% of employees expect AI to partially or fully automate their jobs within 5 years. - TCS, Infosys and Wipro collectively reduced over 60,000 employees in AI-era linked workforce rationalization. - NITI Aayog worst-case scenario: India's tech workforce could contract from 7.5 -8M to 6M by 2031.	- A net gain of 33.89 million new workers in India's job market by 2028. - Service Now projects 2.73 million new tech jobs in India by 2028. - Stanford report: AI integration boosts individual worker productivity by 14% on average.

Table 8: AI Jobs Debate: Displacement vs Creation

THE TRUTH BETWEEN THE NARRATIVES



2.3 India's Policy Response

At the policy level, India has moved faster than most comparable economies. The India AI Mission, approved in March 2024, represents the most coordinated national effort to build an AI-ready workforce. Key initiatives currently underway include:

 SOAR Skiilling for AI Readiness	AI-readiness courses delivered with Microsoft, HCL Technologies and NASSCOM. 1.34 lakh enrolled  Dec 2025
 India AI Data & AI Labs Hubs set up in NIELIT	AI labs set up in Tier-2 and Tier-3 cities; 174 ITIs and Polytechnics approved. 27 states  beyond southern metros
 Microsoft ADVANTA(I)GE INDIA Future vocational reach	Training across 100 rural institutions, with a dedicated strand for young women in Tier-2/3 cities.  500K students  100K women targeted
 National Curriculum Framework Under NEP 2020	Computational thinking and AI literacy integrated into school and higher education.  Adopted update varies by state

Table 9: India's Key Initiatives in AI Adoption

With the world's largest young workforce, India has a unique opportunity to leverage AI for productivity and economic growth. Its young population reoriented toward AI augmentation rather than replacement, could deliver competitive advantages that neither ageing Europe nor demographically plateauing China can replicate. The challenge is to ensure rapid skilling and reskilling so workers can adapt to evolving task requirements.

2.4 Why This Wave Moves Faster

The Industrial Revolution unfolded over a century. India's IT revolution evolved over two to three decades, giving education systems and labour markets time to adjust. AI is compressing that window into years. Three factors explain the acceleration:

	What it means	Why it matters for India
 Digital Infrastructure already exists	AI runs on existing cloud, smartphone and enterprise software ecosystems — no new physical build-out required.	Deployment can reach 1.4B people almost immediately, bypassing the infrastructure lag of earlier transitions.
 AI scales non-linearly	One algorithm can augment or replace thousands of workers simultaneously, at near-zero marginal cost.	India's large entry-level workforce is exposed at scale — the disruption is not gradual but potentially simultaneous.
 Adoption incentives are immediate	AI delivers visible productivity and cost gains to firms right now, creating pressure to adopt faster than institutions can adapt.	Policy, curriculum reform and reskilling work on 3–5 years cycles . Enterprise AI adoption does not wait.

Table 10: Why the AI Transition Is Accelerating Faster Than Previous Industrial Shifts

The central question is no longer whether India can adapt. It is whether India can adapt fast enough.



2.5 | Three Structural Risks India Cannot Ignore



RISK 1 - A Young Workforce Entering at Scale

7-8 million young people enter the labour market annually. Even small disruptions in entry-level job creation translate into large-scale unemployment stress. Unlike ageing economies where workforce contraction absorbs displacement, India must continuously generate new roles. AI threatens to slow exactly the segment - entry-level white-collar jobs - that has historically absorbed educated youth. India's BPO and GCC sector sits at the sharpest edge of the AI transition which is globally important and disproportionately staffed by the educated young workers India produces in the largest numbers.



RISK 2 - A Misaligned Education System

India's education system remains structurally misaligned with labour market needs. Curricula evolve slowly; foundational skills - problem-solving, digital literacy, adaptability - are unevenly distributed. AI raises the bar further: it demands not just technical expertise but the ability to think critically and work alongside intelligent systems. Without rapid reform, the risk is not just unemployment but structural unemployability - workers educated but not equipped.



RISK 3 - A Deep Regional Digital Divide

With AI job listings concentrated in handful of metros, the benefits of India's AI economy are geographically concentrated before they have even fully formed. States like Bihar, Uttar Pradesh, and Jharkhand lack the digital infrastructure, training institutions, and employer ecosystems to participate in AI-driven job creation. If this concentration is not actively countered through policy, India risks a two-speed economy: one part AI-enabled, one part left behind.

Table 11: Three Structural Risks Shaping India's AI Workforce Future



03

India's AI Readiness

Momentum, Gaps, and the Talent



Table 12: India's AI Momentum vs Workforce Readiness Gap

The Readiness Gap

India is no longer preparing for the AI economy- it is already operating within it.

Enterprise adoption is accelerating, AI investments are increasing, and businesses across sectors are redesigning workflows around intelligent systems. Yet workforce readiness is not advancing at the same pace.

The challenge facing India is not AI adoption. It is workforce transformation.

While organisations are moving rapidly from experimentation to implementation, the supply of advanced AI talent remains constrained. The result is a growing gap between what enterprises need and what the labour market currently provides.

This gap will shape India's ability to capture value from the AI economy.

Sectoral patterns of deployment differ significantly. The table below maps where each major industry stands and what roles that creates or displaces:

SECTOR	PRIMARY AI USE CASES	EMERGING WORKFORCE DEMAND
 Banking & Financial Services	 Fraud detection, credit scoring, risk management	 AI risk analysts, compliance specialists
 Healthcare	 Diagnostic support, patient analytics	 Clinical AI specialists, health-data managers
 Manufacturing	 Predictive maintenance, computer vision	 Robotics operators, AI technicians
 IT & Software Services	 AI-assisted coding, automated testing	 MLOps engineers, AI architects
 Retail & E-commerce	 Demand forecasting, personalization	 Digital commerce specialists

Table 14: Sectoral AI Adoption Patterns and Emerging Workforce Demand (India)

A notable shift is underway.

Indian organisations are increasingly moving away from generic AI models toward specialised systems trained on proprietary enterprise data. This transition improves accuracy, reliability, and business relevance. It also significantly raises workforce requirements.

Organisations now require talent capable of:

- Fine-tuning AI models
- Managing enterprise data pipelines
- Monitoring model performance
- Ensuring responsible AI deployment
- Managing privacy and regulatory compliance

The future demand is not simply for AI users. It is for AI builders, integrators, and governors.



"The future of work will be shaped by human - AI collaboration. As educators, our responsibility is to ensure that education moves beyond the mere transmission of knowledge and focuses on nurturing curiosity, creativity, critical thinking, adaptability, and lifelong learning: qualities that will enable students to thrive in a world where AI augments tasks, but human potential remains the true differentiator."

Pooja Kwatra
Senior Education Strategist, Primus Partner Pvt. Ltd

3.2 The Four Tier Talent Model: Where India Stands

India's developer pipeline is expanding at a pace no other country matches. GitHub's 2025 Octoverse data shows India added 5.2 million developers in a single twelve-month period -and approximately 80% of new users adopted AI copilots within their first week of programming. Major IT firms including TCS, Wipro, and Infosys have launched large-scale internal retraining programmes to shift employees from traditional software development to AI-augmented workflows. But the volume alone does not close the skills gap. The labour market consists of four structurally distinct talent categories and India's surplus is concentrated in the wrong ones.

 TALENT TIER	 WHAT THEY DO	 INDIA'S CURRENT POSITION	 SUPPLY STATUS
 CREATORS	Build AI from the ground up – design foundational models, invent new architectures, lead core research	 Small cluster in top IITs and research labs; majority emigrate	  CRITICAL DEFICIT
 TRANSLATORS	Bridge business and technology – define problems, select AI solutions, manage enterprise-grade implementations	 Growing but insufficient; demand outstrips supply by a wide margin	  SIGNIFICANT GAP
 INTEGRATORS	Connect AI tools to real-world applications – build pipelines, ensure reliability in production software	 Large and growing; strong application-layer developer base	  ADEQUATE
 CONSUMERS	Use AI tools to improve daily work – copilots, automation assistants, AI-enhanced productivity software	 Large surplus; fastest-growing segment nationally	  SURPLUS

Table 15: Mapping India's AI Talent Readiness

THE CORE CHALLENGE



India's education system continues to produce high volumes of Consumers and Integrators. The deficit is concentrated at the Creator and Translator tiers - the categories that design AI systems, set enterprise strategy, and manage the interface between AI capability and business value. Bridging this gap is arguably India's most consequential workforce challenge as it seeks to move up the AI value chain.

3.3 Demand for AI Skills: What the Data Shows

Demand for specialised AI skills is already reshaping compensation structures and job listings across India's technology sector. The data points in one direction: supply is not keeping pace.



Table 16: Demand for AI Skills Is Outpacing Talent Supply

Job postings for roles such as prompt engineers, MLOps specialists, and data architects have grown nearly 100% year-on-year, consistent with patterns observed in LinkedIn's Economic Graph data on AI-related hiring.

 Geography	 Current Role in AI Economy	 Hiring Trends
 Bengaluru / Hyderabad / Pune	Primary centres for AI development, foundational model work, and enterprise AI architecture	Deep tech, ML engineering, AI strategy roles -premium salaries;
 Coimbatore / Ahmedabad / Bhubaneswar / Indore	Emerging data centres and Centres of Excellence being established by major companies	Data annotation, model testing, MLOps support roles -growing fast from low base
 Tier-2 Cities (national)	AI-enabled BPOs and knowledge services; retail AI; manufacturing AI applications	AI augmented service roles; demand growing but employer recognition of credentials remains weak

Table 17: Emerging Patterns in AI Hiring Across India

3.4 | India's BPO and GCC Sector: The Most Exposed Segment

India's business process outsourcing (BPO) and Global Capability Centre (GCC) sectors directly employ more than 5 million workers and contribute approximately \$38 billion in export revenue. They are also the segment of India's organised workforce most directly exposed to AI-driven task automation and the least discussed in mainstream AI workforce policy.

AI systems are already performing voice support interactions, document processing, claims adjudication, and basic financial analysis in production environments at major global firms. The tasks that once required teams of 50 can increasingly be handled by teams of 5 with AI augmentation. This does not mean 90% of BPO workers will lose their jobs overnight — but it does mean that the nature of BPO work is changing faster than the workforce is retraining.

The emerging model is a shift from execution-heavy service delivery to AI oversight, quality assurance, exception handling, and relationship management. Workers who develop these capabilities will thrive. Workers who remain anchored to the tasks that AI is automating will face significant career risk within three to five years.

Policy recommendation: The Ministry of Electronics and Information Technology (MeitY) and NASSCOM should develop a joint BPO Workforce Transition Plan by Q4 2026, with dedicated reskilling pathways for the AI oversight, quality assurance, and complex client management roles that will define the sector's next phase.



3.5 Where India Stands Globally

India occupies a distinctive position in the global AI landscape.

According to Stanford University's 2025 Global AI Vibrancy Tool ranked India third globally, behind the United States and China. The global AI economy operates on a three-way structure that is worth understanding clearly:

 Country	 Core Advantage	 Strategic Position	 India's Comparison
 United States	Venture capital concentration, foundational research, semiconductor design	Sets the frontier - models, chips, research direction	India cannot match VC depth or chip R&D
 China	State-backed data aggregation, hardware manufacturing at scale, government AI integration	Parallel AI ecosystem; competes on volume and state integration	India has privacy constraints China does not
 India	Demographic scale, English-speaking STEM graduates, Digital Public Infrastructure (UPI, ONDC, Aadhaar), India – specific data moat	Engineering volume to tune, deploy, and maintain AI globally; India-specific model localisation	Skill penetration 2.5× global average; unique data moat from DPI;

Table 18: India's Strategic Position in the Global AI Landscape

India's Unique Advantage: Digital Public Infrastructure

Few countries possess digital platforms operating at India's scale.

Systems such as:

- UPI
- ONDC
- Aadhaar-enabled ecosystems
- Digital public-service platforms

generate large volumes of structured, real-world data.

This creates opportunities for:

- Indian-language AI models
- Localised AI applications
- Public-sector AI innovation
- AI solutions tailored to emerging-market conditions

These capabilities provide India with a differentiated position within the global AI economy.

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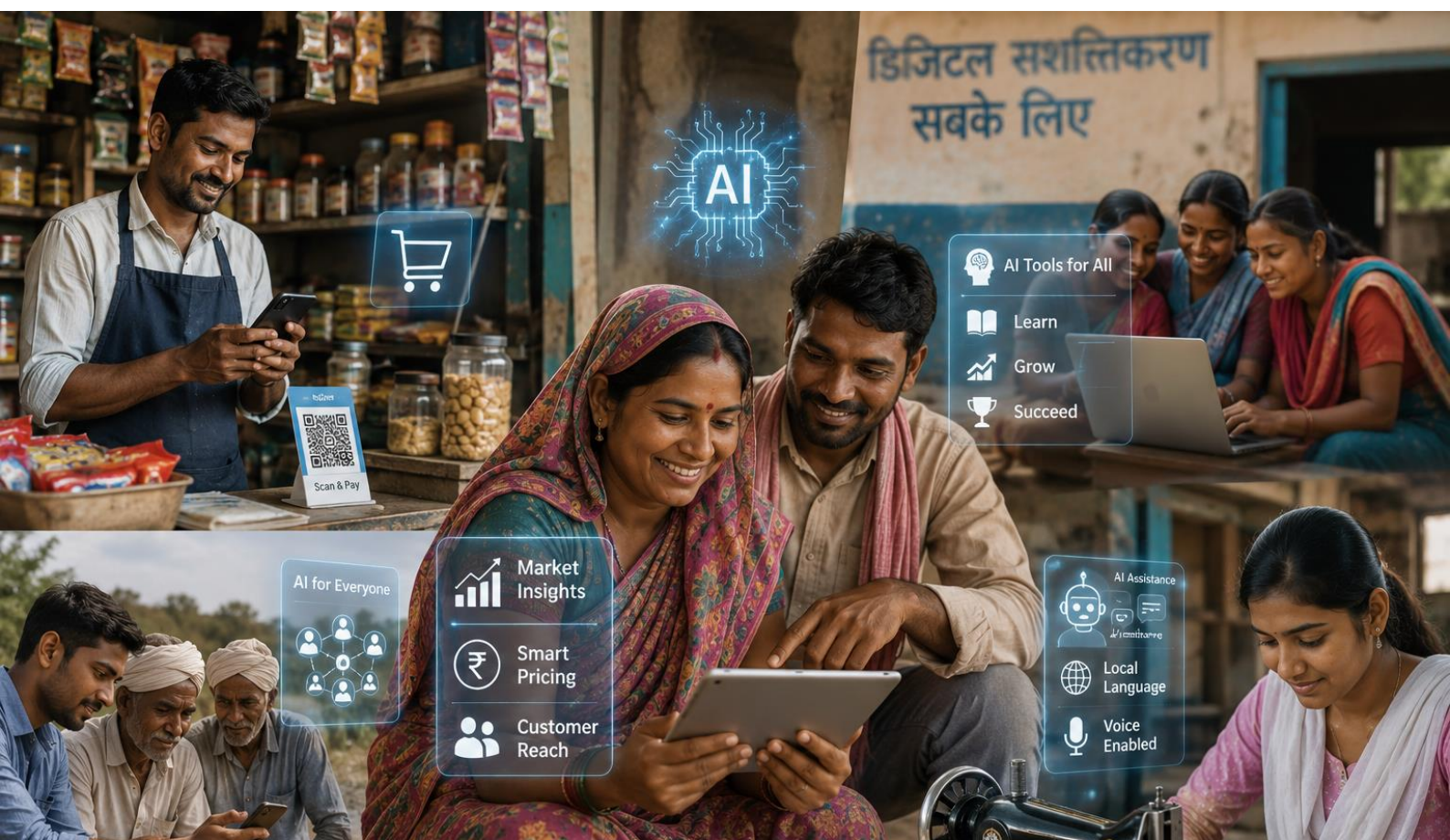
"In emerging economies, AI can be a powerful equalizer if applied thoughtfully. It can enable small businesses, regional language ecosystems, and underserved populations to participate in the digital economy in ways that were never possible before."

Dr. Ajay Data, Managing Director of the Data Group of Industries

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Key Takeaway

- India's challenge is not AI adoption.
- India's challenge is workforce readiness.
- The country has demonstrated its ability to adopt AI rapidly and at scale. What remains uncertain is whether the workforce can evolve quickly enough to support that transformation.
- India's growing digital infrastructure, AI ecosystem, and policy support provide a strong foundation for AI adoption. However, readiness will depend on expanding AI literacy beyond technology professionals to the broader workforce.





04

Voices from the Workforce

*What India's Workers, Employers and Students Are
Experiencing in the AI Transition*

4.1 Primary Survey Overview

Research Overview

This survey captured responses from 345 participants across five stakeholder groups and 15 states. Given the geographic breadth and thematic complexity of India's workforce transition, these 345 responses are intended to provide directional insights rather than statistically representative findings.. The survey was designed to ensure participation from diverse economic, industrial, and educational ecosystems, spanning both established technology hubs and emerging workforce markets.

 Stakeholder Group	 Participation
 Employees	
 Students	
 Founders / Employers	
 HR Leaders	
 Policymakers	

Total Respondents: 345

Geographic Coverage of the Primary Survey

 Region	 States / UTs Covered
 North India	Haryana, Chandigarh, Uttarakhand
 West India	Rajasthan, Maharashtra, Gujarat, Goa
 South India	Andhra Pradesh, Telangana, Karnataka, Kerala
 East & Northeast India	West Bengal, Assam
 Central India	Chhattisgarh, Madhya Pradesh

Coverage: 15 States and Union Territories across India

4.2 Research Framework: The Seven Hypotheses and Their Assessment

The study examined seven hypotheses related to AI's impact on jobs, skills, productivity, education, and workforce governance.

 HYPOTHESIS	 ASSESSMENT	 KEY EVIDENCE
 H1: AI is causing large-scale job loss	 Partially Supported	Task automation and role evolution, not large-scale job elimination.
 H2: AI is transforming tasks within jobs	 Strongly Supported	The dominant pattern across all stakeholder groups. 68% of employees report to have AI assists in selected tasks; only 3% report significant role changes.
 H3: AI creates a growing gap between users and non-users	 Strongly Supported	97% of founders report that AI-enabled employees outperform peers. Daily AI users report significantly stronger career growth expectations.
 H4: AI improves workforce productivity	 Strongly Supported	82% of founders report significant reduction in execution time. 94% report moderate or significant productivity gains overall.
 H5: Entry-level jobs are being redefined	 Supported	40% of respondents believe traditional entry-level tasks are already being handled by AI. 31% report entry-level roles now require stronger technical capabilities.
 H6: Education systems are not keeping pace with AI adoption	 Strongly Supported	Only 15% of students feel highly prepared; only 10% learn AI through formal education; 41% of employers identify AI skills as the largest graduate gap.
 H7: Governance and workforce support systems are critical for successful AI adoption	 Supported	71% of employees consider workplace AI policies important. Only 29% of organisations have comprehensive governance frameworks.

Table 19: Assessment of the Seven Hypotheses

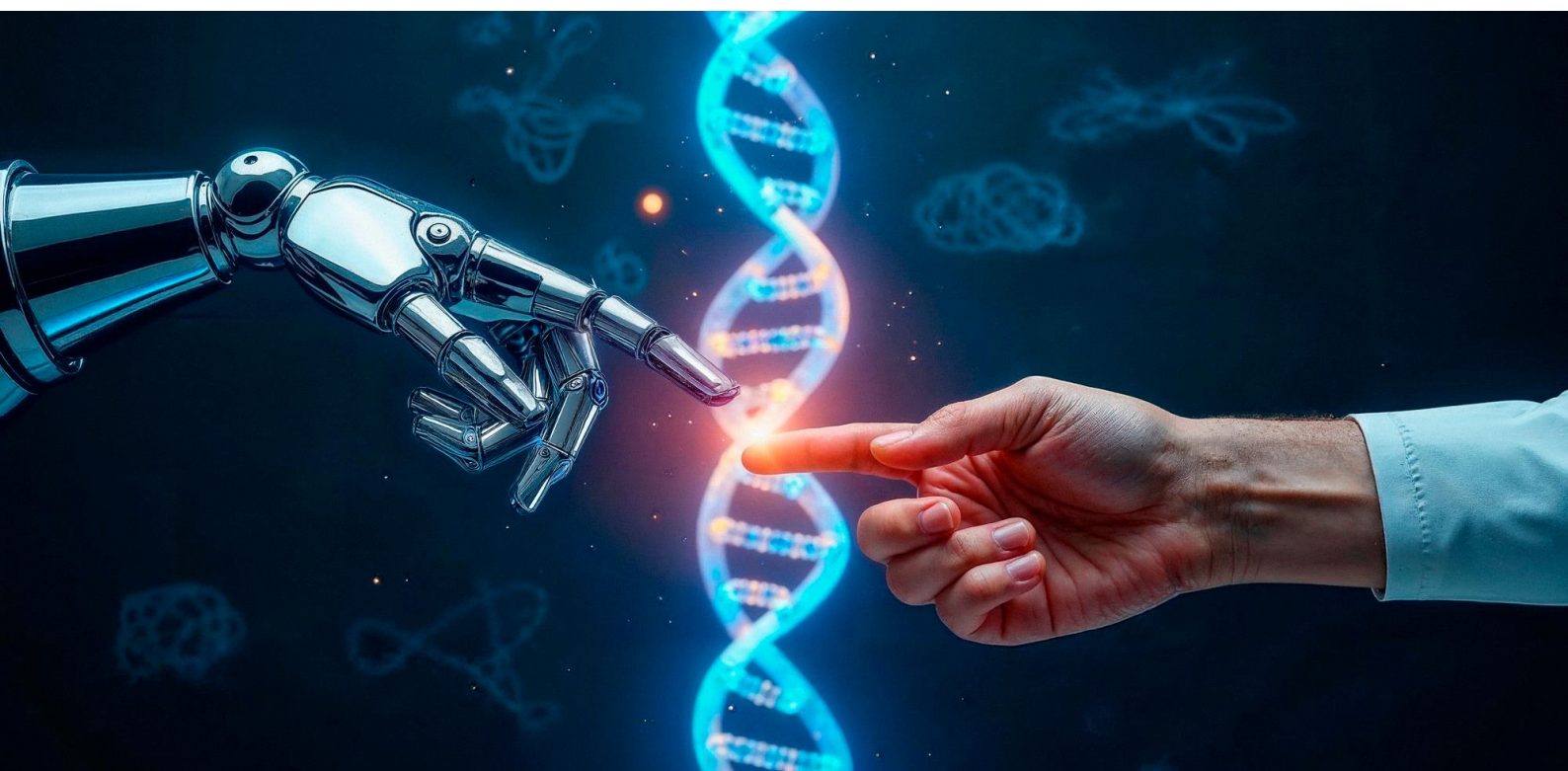
4.3 Seven Key Insights from the Primary Research

Insight 1: AI Is Reshaping Work Faster Than It Is Eliminating Jobs

The survey challenges the dominant narrative that AI adoption is primarily a story of job loss. Across stakeholder groups, the evidence points to a more gradual but equally significant transformation. AI is changing how work is performed, particularly in functions involving documentation, reporting, data processing, and routine digital tasks. Employees largely report AI as an assistive technology rather than a replacement technology, while founders and HR leaders expect future workforce changes to be driven more by task automation than by reductions in headcount.

AI-led workforce change should be understood as a transition, not simply as a job-loss story. Like earlier waves of technological and economic disruption, AI is changing the nature of work before it changes the overall structure of employment. The Industrial Revolution altered manual and factory work, the dot-com boom reshaped business models and digital jobs, and India's market liberalisation pushed companies and workers to adapt to a more competitive economy, more recent one is e commerce, which changed the way people shop. Each of these shifts created uncertainty, displaced some forms of work, and required a period of adjustment.

However, over time, markets corrected, new industries emerged, and workers moved towards new skills and roles. AI is likely to follow a similar path. Some job losses and role reductions may occur in the short term, especially where tasks are repetitive, routine or documentation-heavy. However, this is better seen as a temporary labour-market correction rather than a permanent employment collapse. The larger question is how quickly employees, companies, education institutions and governments can adapt. Employees will need to upskill, companies will need to redesign roles, education systems will need to update curricula, and policymakers will need to create support systems for affected workers. The pace and quality of this adaptation will determine whether AI becomes a source of disruption or a driver of wider productivity and employment transformation.



Current Impact on Employee Role (%)

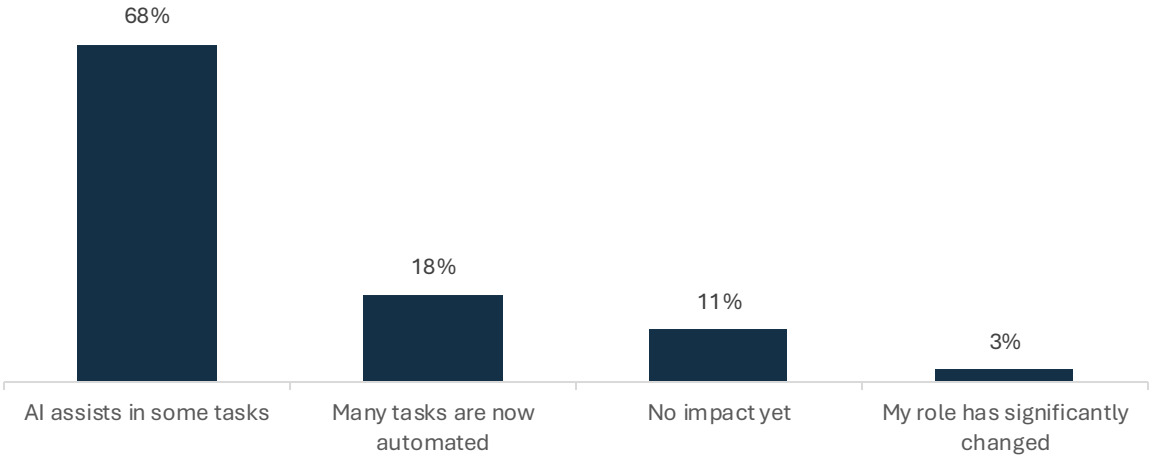


Figure 4.1: Current Impact of AI on Employee Roles

Expected Future Impact on Employee Roles(%)

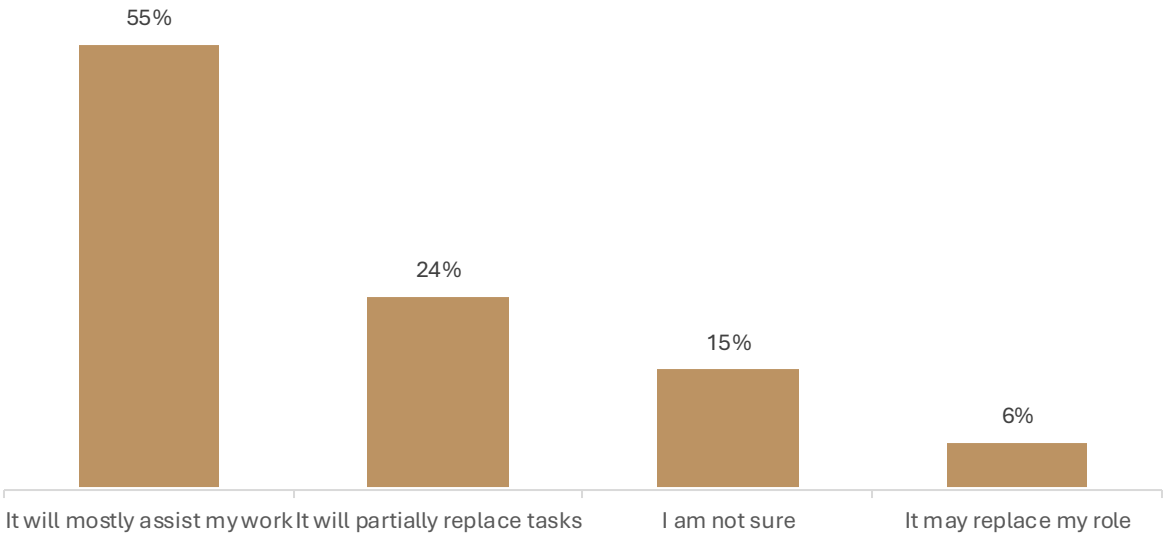


Figure 4.2: Expected Future Impact of AI on Employee Roles

a) Employers

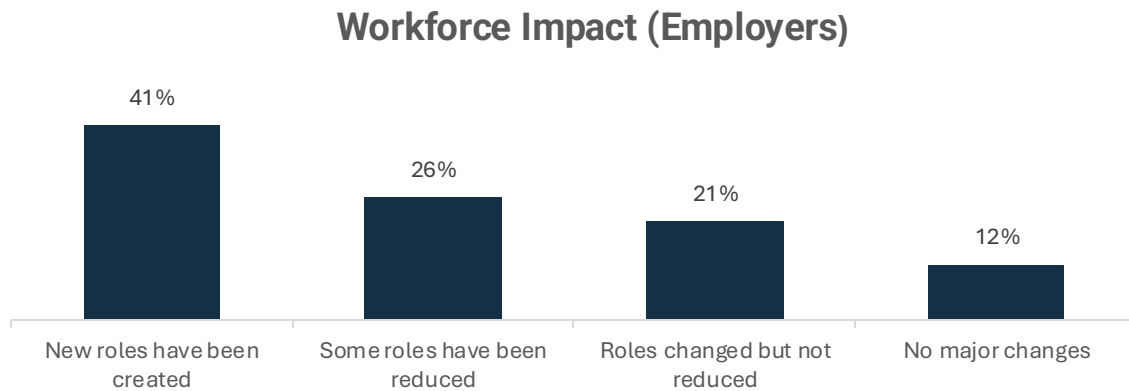
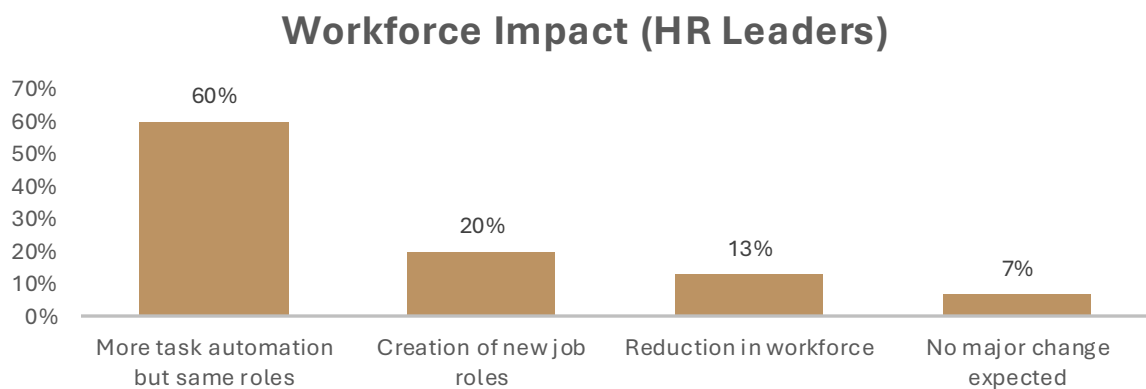


Figure 4.3: Workforce Impact Outlook Across

b) HR Leaders



Key Findings:

- 68% of employees report that AI assists them in selected tasks.
- Only 3% report significant changes to their overall role.
- 55% expect AI to assist their work in the future.
- Only 6% believe AI could completely replace their role.
- 60% of HR leaders expect increased automation within existing jobs rather than workforce reductions.
- 41% of founders report the creation of new roles linked to AI adoption.



Strategic Insight

The workforce transition underway is not primarily one of job elimination but of job redesign. Organizations should therefore focus on workforce transformation, reskilling, and redesigning workflows rather than treating AI solely as a cost-reduction tool. The greatest risk may not be job loss, but a growing mismatch between evolving job requirements and workforce capabilities.



Insight 2: The Real Unit of Change Is the Task, Not the Job

AI adoption is occurring at the task level rather than at the occupation level. Employees, founders, and HR leaders consistently report that AI is automating specific activities while leaving broader roles largely intact. The most common use cases include reporting, documentation, data analysis, administrative support, and customer interactions.

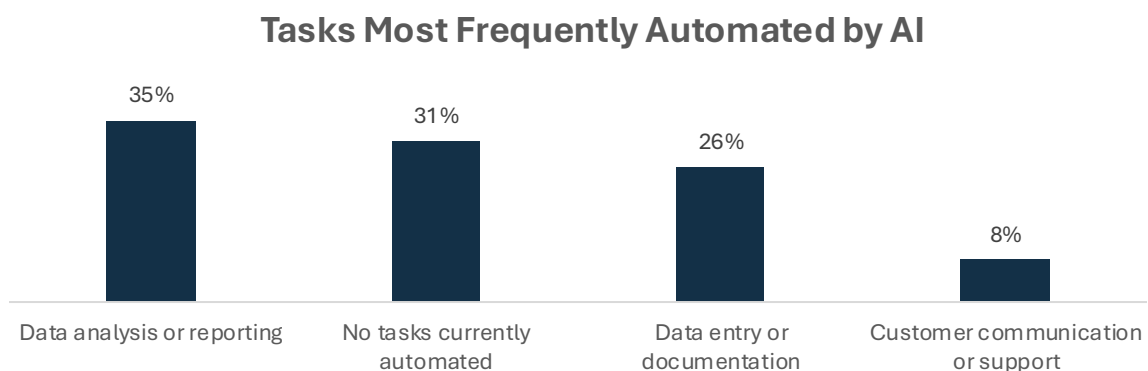


Figure 4.4: Tasks Most Frequently Automated by AI

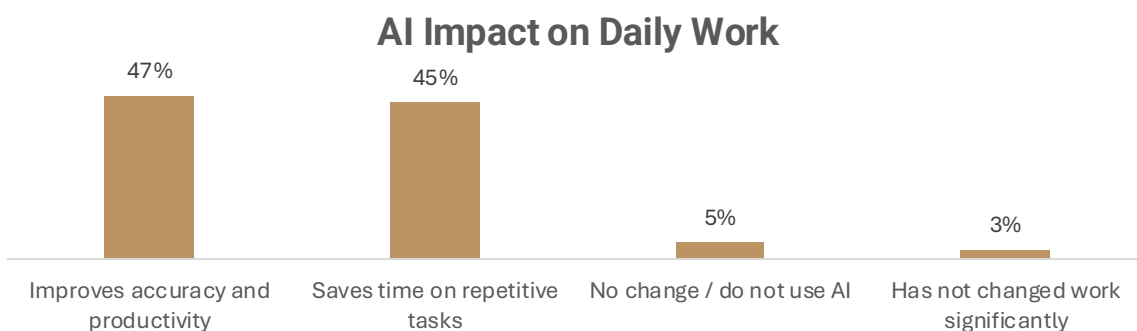


Figure 4.5: How AI Is Changing Daily Work

Task Automated According to Founders

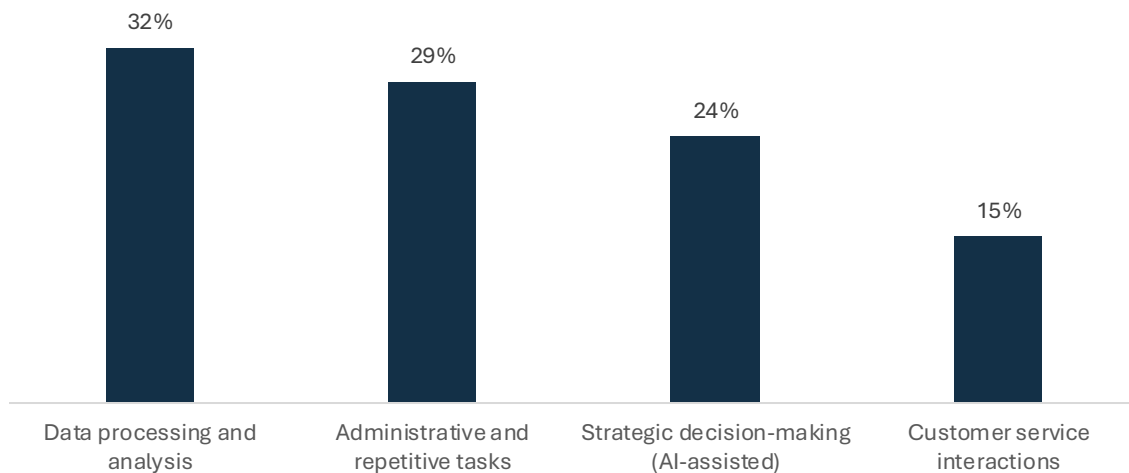


Figure 4.6 (a): AI Impact Across Founders

Task Automated According to HR

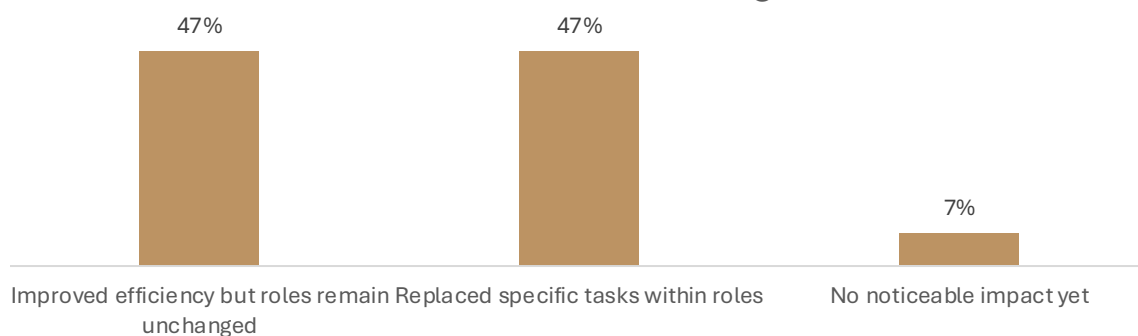


Figure 4.6 (b): AI Impact Across HR Leaders

Key Findings:

- 35% of employees identify data analysis and reporting as the most automated activities.
- 26% identify documentation and data entry.
- 47% report improved productivity and accuracy.
- 45% report significant time savings.
- 94% of HR respondents indicate AI has either improved efficiency or replaced selected tasks within roles.



Strategic Insight

This finding suggests that workforce planning should shift from job-based thinking to task-based thinking. Practically, this means organisations conducting a task – level audit of each major role family – classifying activities as automate, augment, human retain and rebuilding job descriptions, training plans, and hiring criteria around the classification, while preserving the uniquely human elements of work such as judgment, creativity, collaboration, and leadership.

Insight 3: A New Workforce Divide Is Emerging Between AI Users and Non-Users

The survey reveals a growing performance and employability gap between workers who actively use AI tools and those who do not. This divide is not purely technical; it reflects differences in productivity, confidence, adaptability, and career progression.

Employee Perception of Career Risk for Non-AI Users

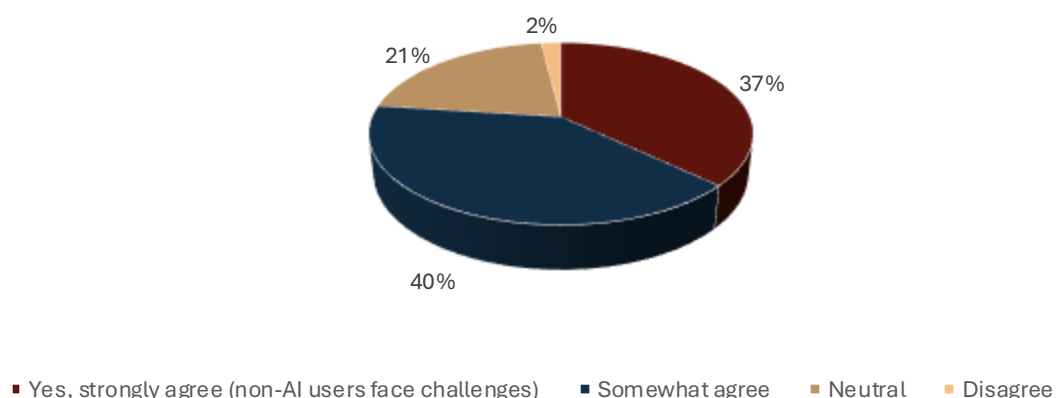


Figure 4.7: Employee Perception of Career Risk for Non-AI Users

Do AI-enabled employees outperform peers? (Founder View)

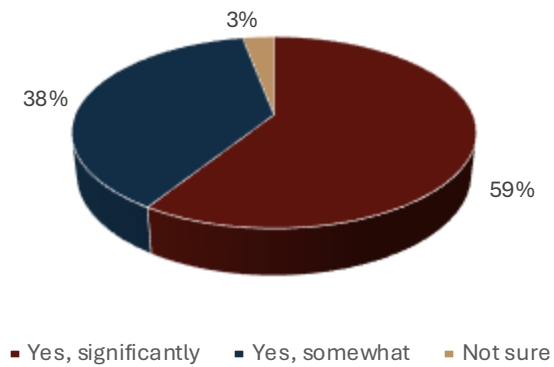


Figure 4.8: Founder View – Do AI-Enabled Employees Outperform Their Peers?

Incentive for AI-skilled Employees

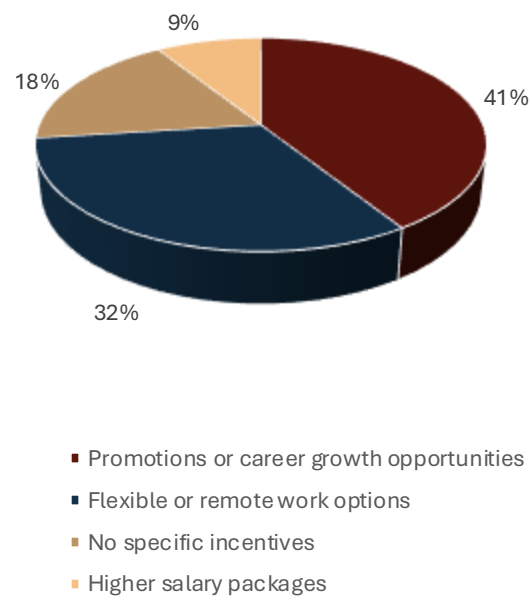


Figure 4.9: AI Usage Frequency vs Career Growth Expectations

Key Findings:

- 77% of employees believe workers without AI skills may face career growth challenges.
- 97% of founders report that AI-enabled employees outperform their peers.
- Daily AI users report significantly stronger expectations of career advancement than infrequent users.
- 41% of founders indicate AI-skilled employees receive stronger career growth opportunities.



Strategic Insight

The AI divide may become one of the defining workforce inequalities of the coming decade. Organisations that democratise access to AI tools and training will likely achieve higher productivity and more inclusive workforce outcomes than those that rely on informal adoption alone.



Insight 4: Productivity Gains Depend on AI Fluency, Not AI Access Alone

While AI is delivering measurable productivity benefits, the survey suggests that value creation depends on how effectively individuals use AI rather than simply whether they have access to it. As routine work becomes automated, human capabilities such as problem framing, judgment, validation, and decision-making become increasingly important.

Has AI Reduced Time spent on Execution Tasks? (Founder)

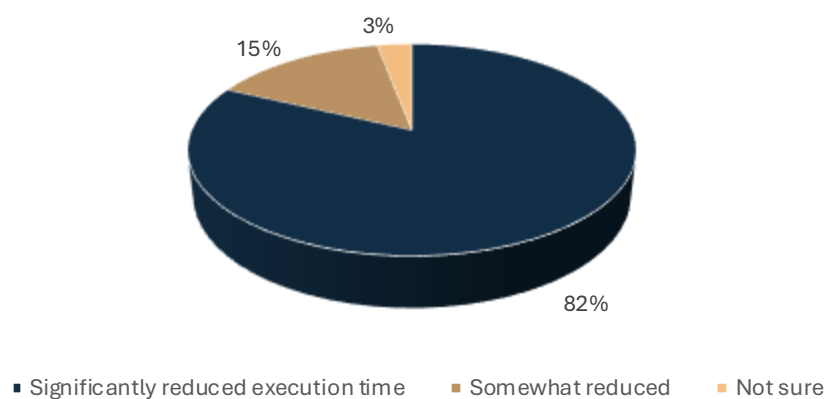


Figure 4.10: Has AI Reduced Execution Time?

What has Increased Most in work due to AI?

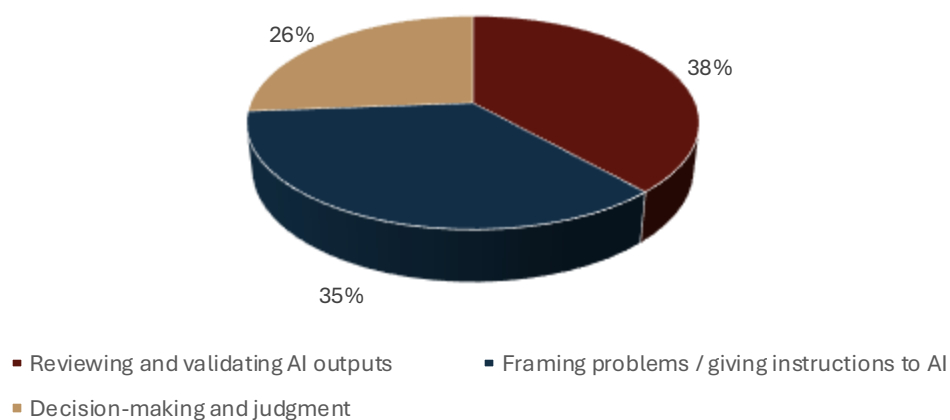


Figure 4.11: What Human Skills Become More Important in AI-Enabled Work?

Productivity Impact

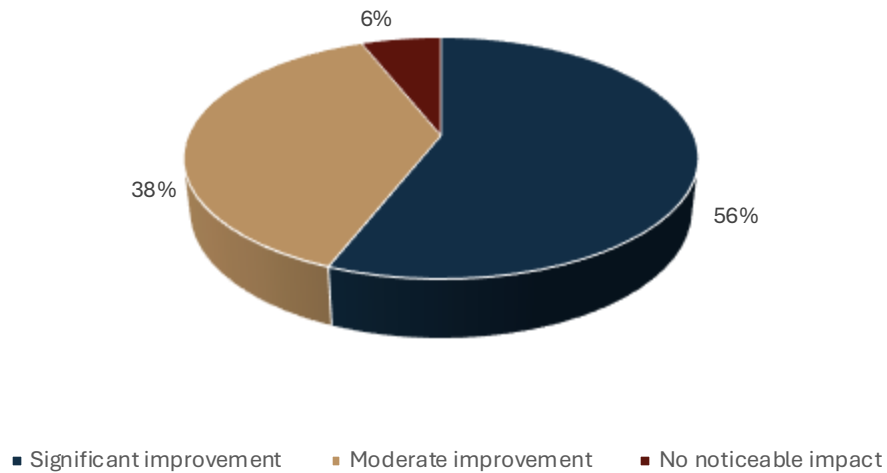


Figure 4.12: Productivity Impact of AI Adoption

Key Findings:

- 82% of founders report significant reductions in execution time.
- 94% report moderate or significant productivity gains.
- Reviewing AI outputs (38%), problem framing (35%), and decision-making (26%) emerged as the human capabilities in AI-enabled workplaces.



Strategic Insight

The competitive advantage created by AI will increasingly belong to organisations that build AI fluency rather than simply deploy AI tools. Training programmes should therefore focus on responsible usage, critical evaluation, and decision-making alongside technical proficiency.



Insight 5: Entry-Level Career Pathways Are Being Fundamentally Redefined

AI is changing the traditional entry point into many professions. Tasks that once provided learning opportunities for early-career workers—including documentation, basic analysis, reporting, and routine administration—are increasingly being automated.

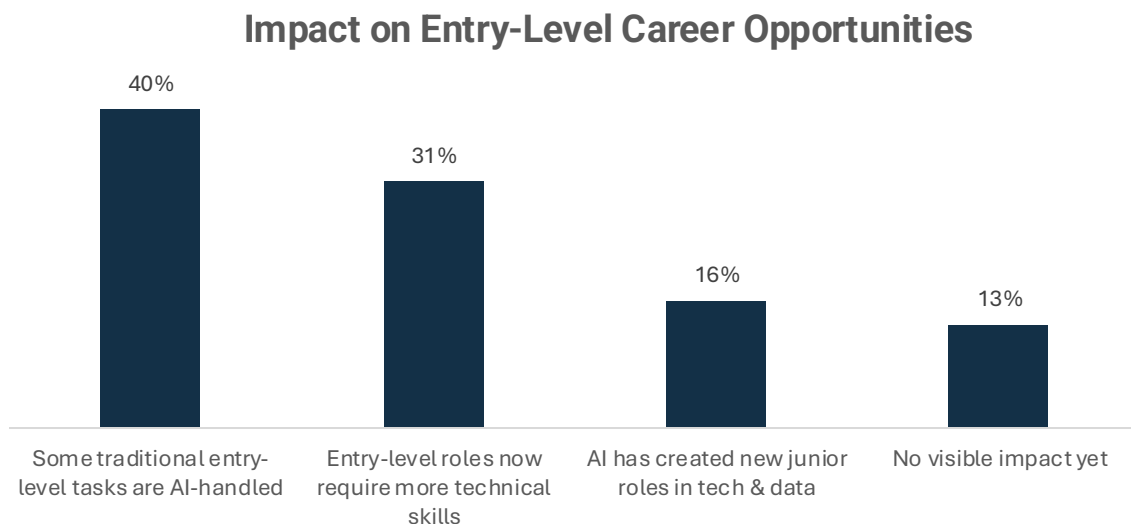


Figure 4.13: Impact on Entry-Level Opportunities

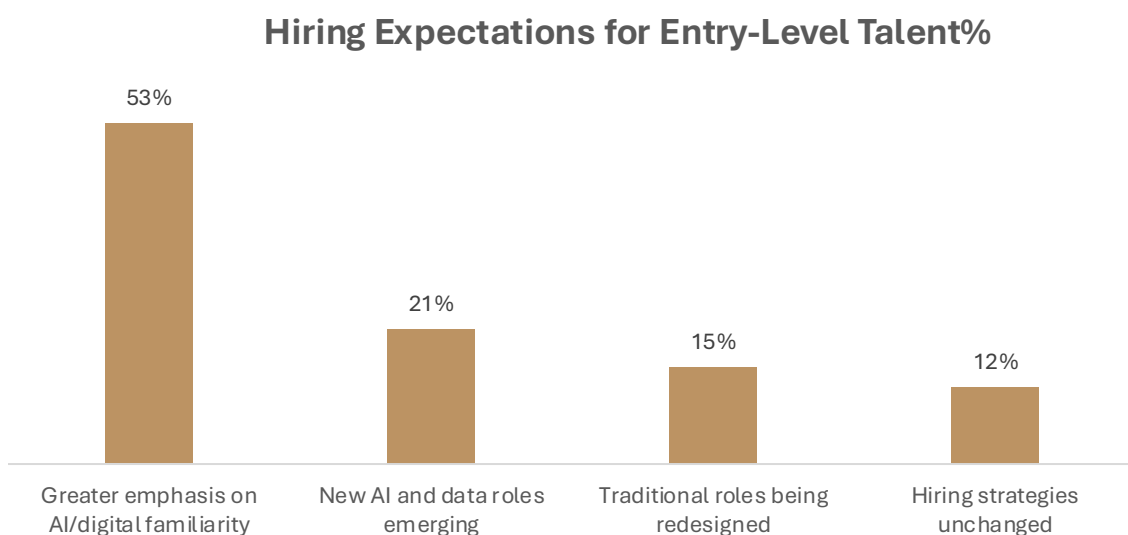


Figure 4.14: Changing Hiring Expectations for Entry-Level Talent

Which Entry-Level Tasks Are Most Vulnerable to AI?

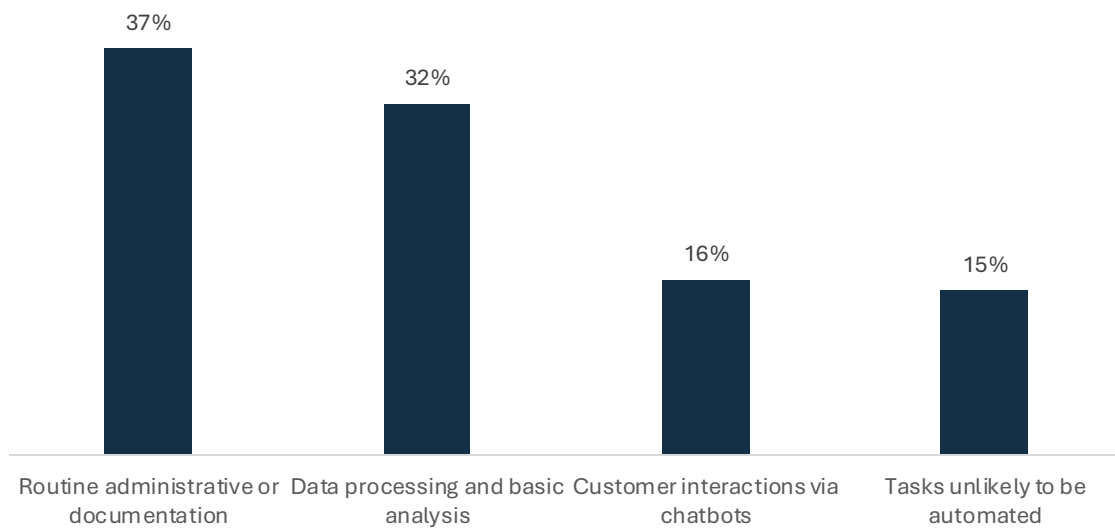


Figure 4.15: Which Entry-Level Tasks Are Most Vulnerable to AI?

Key Findings:

- 40% of respondents believe traditional entry-level tasks are already being handled by AI.
- 31% report that entry-level jobs now require stronger technical and digital capabilities.
- 53% of founders place greater emphasis on AI and digital familiarity during hiring.



Strategic Insight

The challenge is not simply protecting entry-level jobs but redesigning learning pathways. Educational institutions and employers must create new mechanisms through which young workers can acquire practical experience in increasingly automated workplaces.



Insight 6: The Skills Gap Is Emerging as the Greatest Constraint on Workforce Readiness

Perhaps the strongest finding in the survey is the growing disconnect between workforce requirements and workforce preparedness. Students recognise the importance of AI skills, yet many do not feel adequately prepared for AI-enabled workplaces. It is a readiness gap, driven by structural under - investment in AI education at all levels.

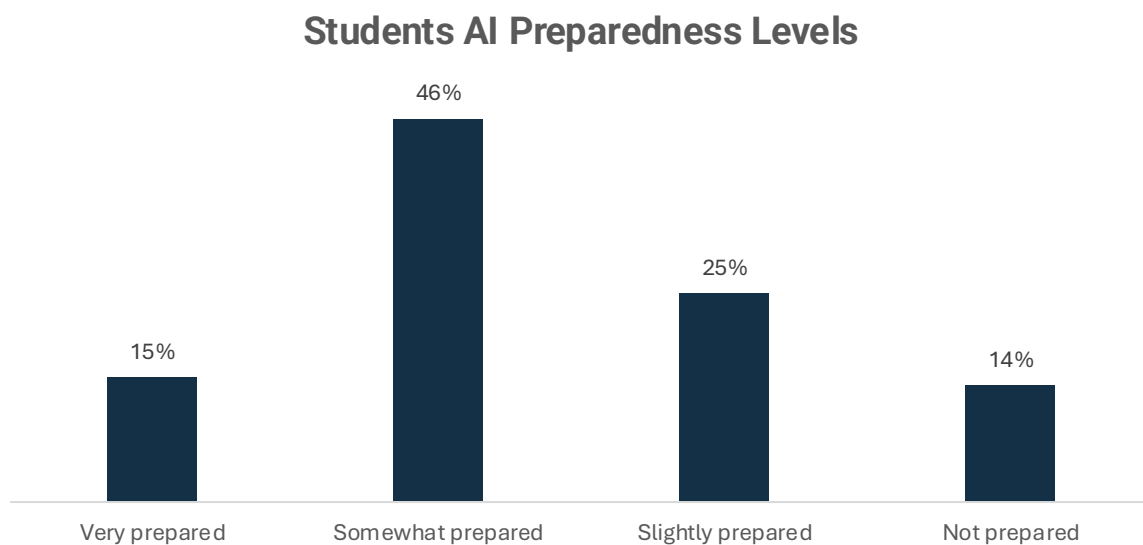


Figure 4.16: Student AI Preparedness Levels

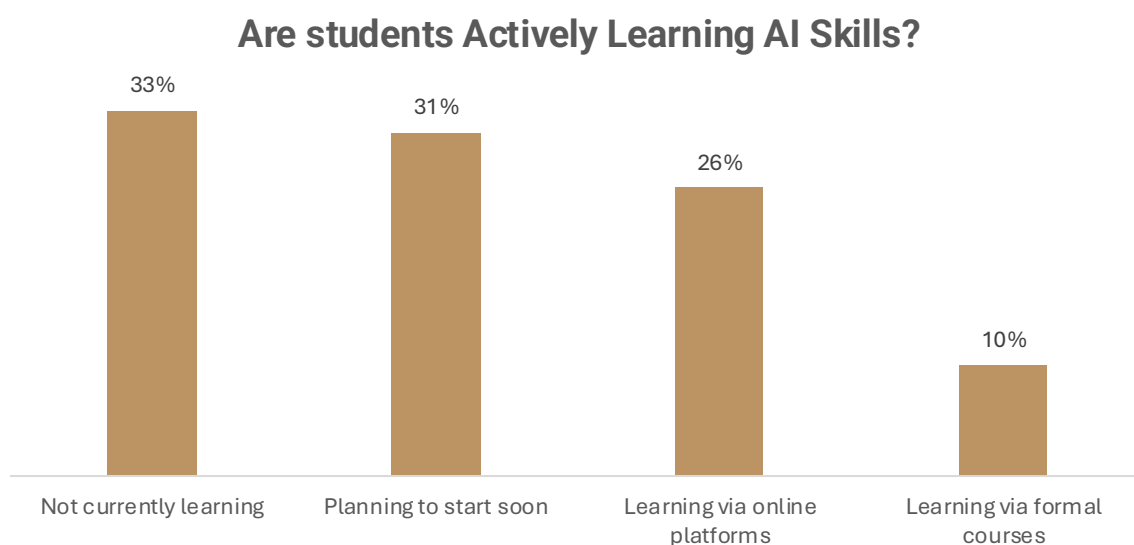


Figure 4.17: Are Students Actively Learning AI Skills?

Challenges Faced by Students in Learning AI

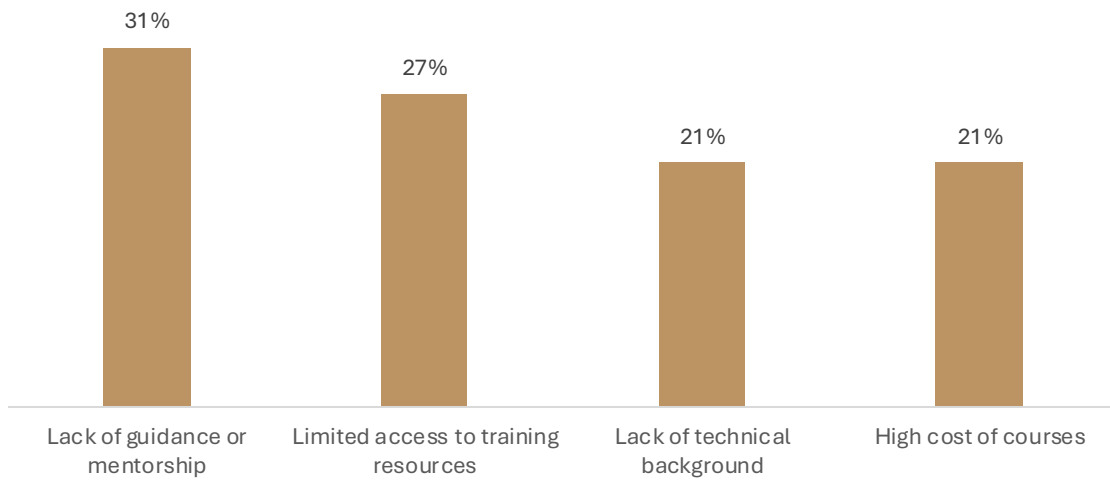


Figure 4.18: Challenges Faced by Students in Learning AI

Top Skill Gaps Identified by Employers

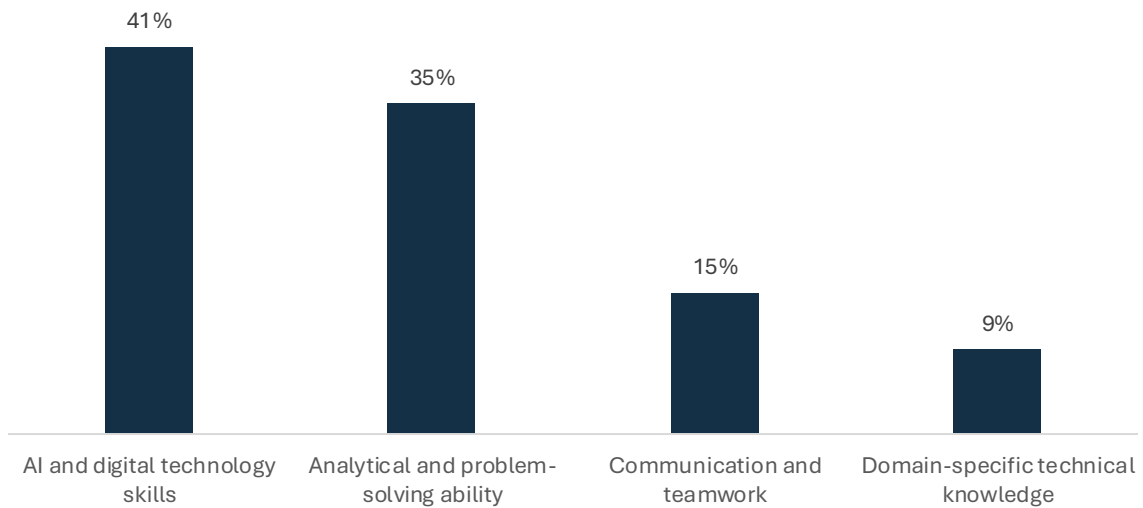


Figure 4.19: Top Skill Gaps Identified by Employers

Graduate AI Skills and Employer Needs

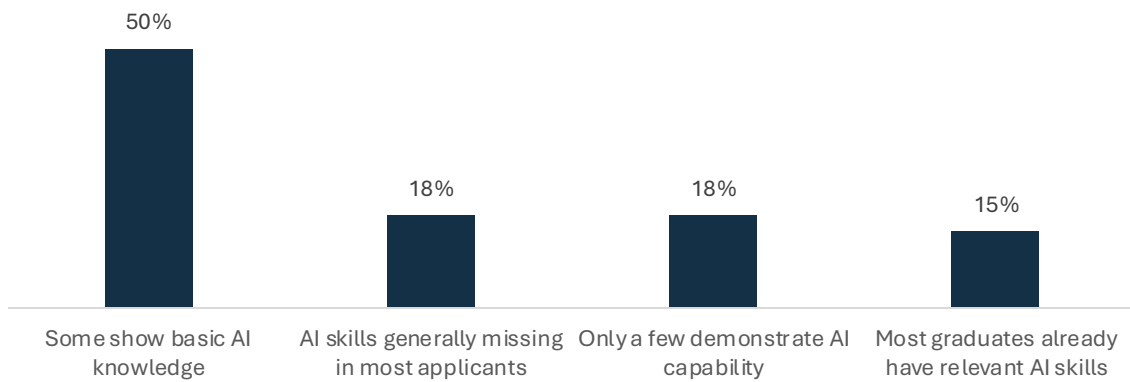


Figure 4.20: Graduate AI Skills vs Employer Needs

Learning Pathway and Workforce Readiness

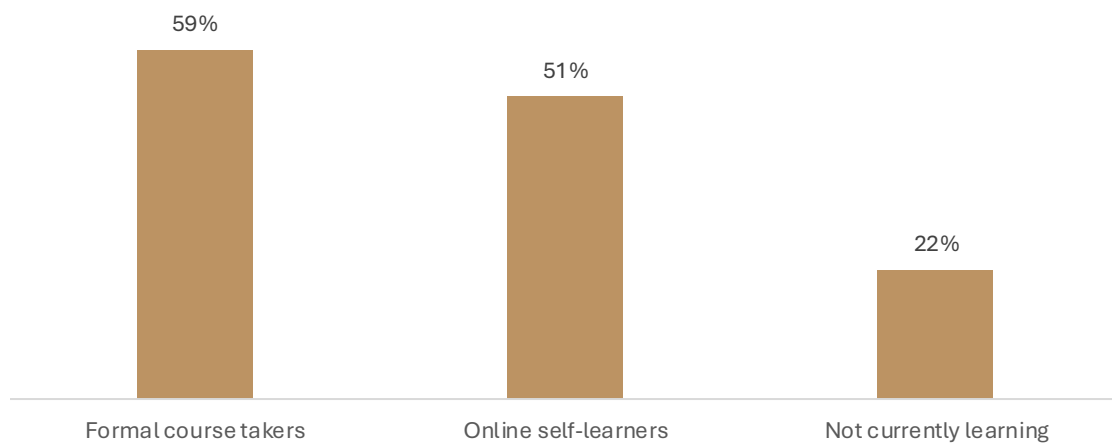


Figure 4.21: Learning Pathway and Workforce Readiness

AI Training Provided by Organizations

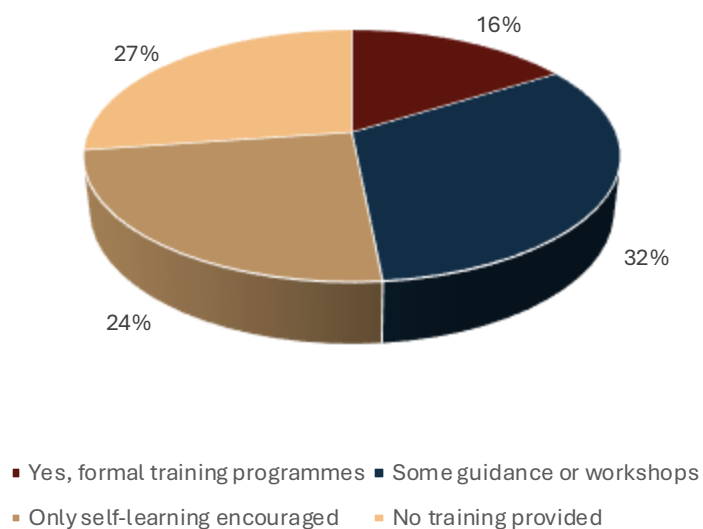


Figure 4.22: AI Training Provided by Organisations

Key Findings:

- Only 15% of students feel highly prepared for AI-driven workplace changes.
- 39% feel only slightly prepared or not prepared at all.
- Just 10% are learning AI through formal education programmes.
- 41% of employers identify AI and digital skills as the largest gap among graduates.
- Only 16% of employees receive formal AI training from their organisations.

Strategic Insight

India does not face an AI awareness problem; it faces an AI readiness problem. Without accelerated curriculum reform, workforce development programmes, and organisational learning initiatives, the skills gap risks becoming the largest barrier to inclusive AI adoption

Insight 7: Governance Will Shape the Success of Workforce Transition

As AI adoption accelerates, concerns around governance, ethics, transparency, privacy, and workforce protection are becoming increasingly important. Workers and employers alike recognise the need for clearer frameworks to guide responsible AI use – but governance capability is lagging adoption.

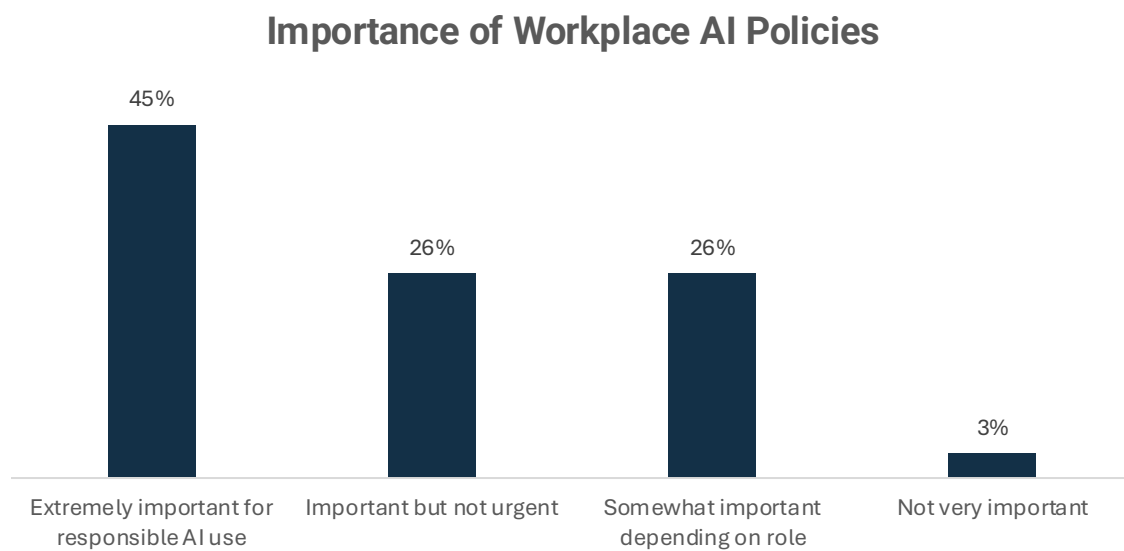


Figure 4.23: Importance of Workplace AI Policies

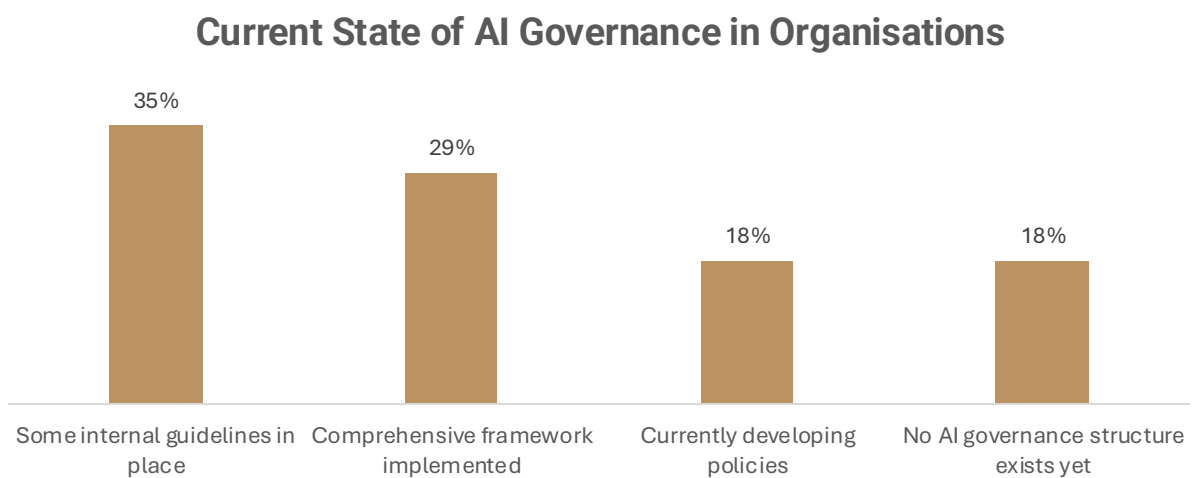


Figure 4.24: Current State of AI Governance in Organisations

Governance Challenges Faced by Organisations

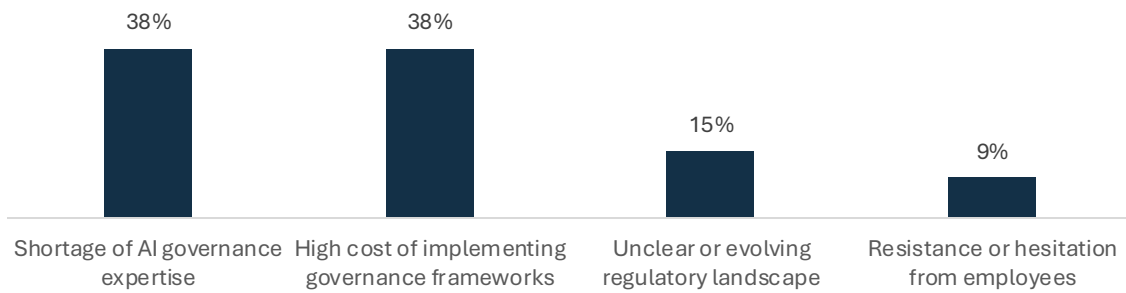


Figure 4.25: Governance Challenges Faced by Organisations

Government Priorities on AI and Employment

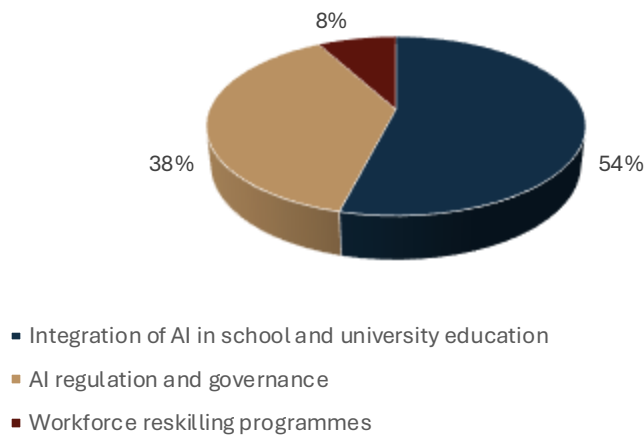


Figure 4.26: Government Priorities for AI and Employment

Preferred Support Mechanisms for Workers

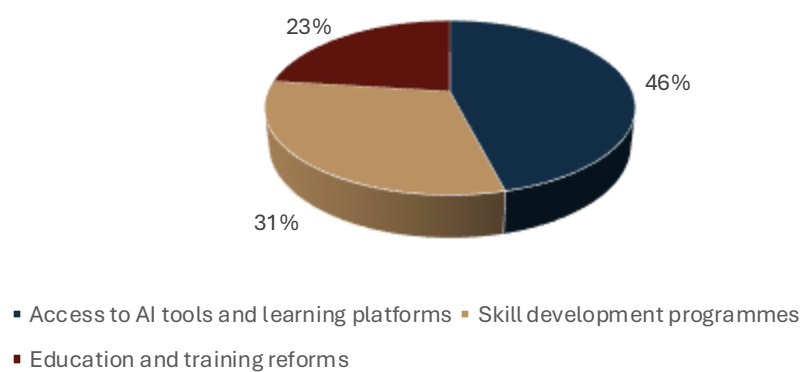


Figure 4.27: Preferred Support Mechanisms for Workers

Employee Concerns About AI Adoption

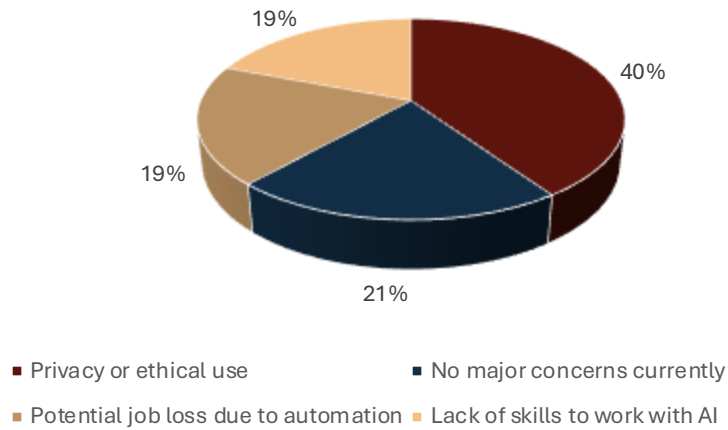


Figure 4.28: Employee Concerns About AI Adoption

Key Findings:

- 71% of employees consider workplace AI policies important or extremely important.
- 40% identify privacy and ethical concerns as their primary AI-related concern.
- Only 29% of organisations report having comprehensive AI governance frameworks.
- Policymakers identify education and AI governance as the highest priorities for workforce preparedness.



Strategic Insight

The long-term success of AI adoption will depend not only on technology deployment but also on trust. Effective governance frameworks can accelerate adoption by providing clarity, accountability, and confidence among workers and employers alike.



4.4 | What the Findings Mean

The survey findings present a clear picture of a workforce transition that is already underway. AI is influencing how work is performed, how organisations hire, how students prepare for careers, and how policymakers think about future labour markets. The evidence does not support a narrative of immediate, large-scale job displacement. Instead, it points towards a future defined by task transformation, productivity enhancement, changing skill requirements, and growing demand for continuous learning.

Three conclusions stand out.

First, the dominant workforce model emerging from the survey is one of augmentation rather than replacement.

Second, AI skills are rapidly becoming a prerequisite for employability and career progression.

Third, education systems, workforce development mechanisms, and governance frameworks are not evolving at the same pace as technological change.

The central message of this report is therefore clear: the workforce increasingly views AI as a tool that enhances efficiency and supports decision-making rather than a direct replacement for jobs. Concerns remain around skill gaps and the need for continuous learning opportunities.



The background of the entire page is a complex, abstract network of glowing blue lines and dots, resembling a molecular structure or a data network. The lines and dots are interconnected, creating a dense, web-like pattern that fills the entire frame. The colors are primarily shades of blue, with some lighter and darker tones, giving it a three-dimensional, ethereal appearance.

05

Cross-Cutting Themes

What the Research Reveals

5.1 The Compounding Skills Gap

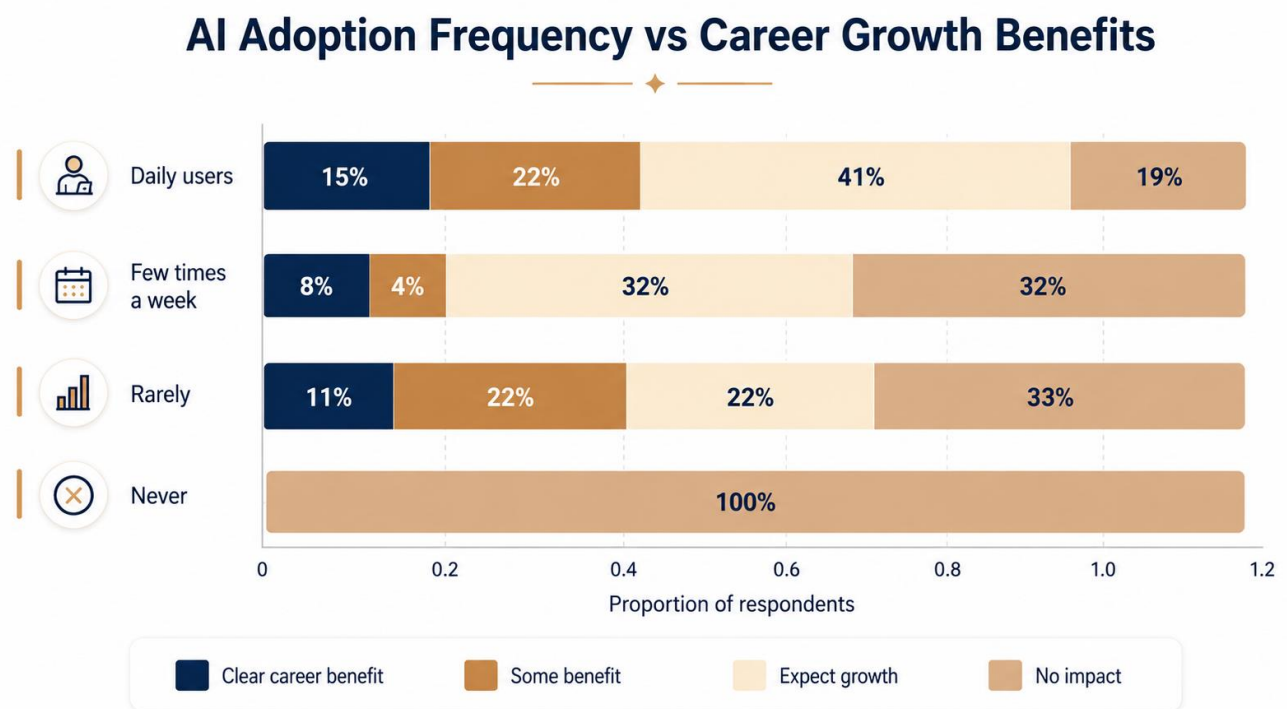


Figure 5.1 AI Adoption Frequency vs Career Growth Benefits

The AI divide is not binary. It compounds over time. Workers who adopt AI early gain productivity, visibility, and career advantages that reinforce their lead.

Workers are not simply divided into those who possess AI skills and those who do not. Instead, AI adoption creates a compounding advantage. Individuals who engage with AI tools early gain productivity improvements, confidence, workplace visibility, and stronger career prospects. These advantages then reinforce one another over time.

The survey demonstrates this clearly. Employees overwhelmingly recognise that AI skills influence career progression, while founders consistently report stronger performance among AI-enabled workers. More importantly, frequent users of AI tools report significantly stronger expectations of career growth than occasional users or non-users. This is not merely a current advantage – it is a **compounding trajectory**.

COMPOUNDING
ADVANTAGE
DYNAMIC

AI adoption creates cumulative advantages over time, widening the gap between adopters and non-adopters.



Timeframe

Compounding Advantage Dynamic



Year 1-2

AI adopters develop tool familiarity, time savings, and basic productivity gains. Non-adopters experience no immediate penalty – jobs remain intact.



Year 3-4

AI adopters have built a track record of higher output, faster delivery, and AI-augmented quality. They are more visible to employers, more promotable, and more employable. Non-adopters face growing performance gaps even with equivalent experience.



Year 5+

AI adopters are in leadership roles, driving strategy, and commanding premium salaries. Non-adopters are competing for increasingly automated roles with declining market value. The gap is no longer closeable through effort alone – structure re-entry pathways are required.

Table 20: The Compounding AI Career Gap

The implications are particularly significant for younger workers. As routine work becomes automated and entry-level roles evolve, opportunities to acquire workplace skills through traditional pathways are narrowing. Early AI exposure is therefore becoming an important determinant of long-term employability – not just in the next job, but across an entire career arc.

“



"AI will not be remembered for the jobs it automates, but for the opportunities it creates. The real winners will be those who combine this technology with entrepreneurship to solve real world problems, create value, and generate employment on a scale."

Mahavir Pratap Sharma
President, TiE Rajasthan / Director, Apex Hospital

”

5.2 The Geographic AI Readiness Divide

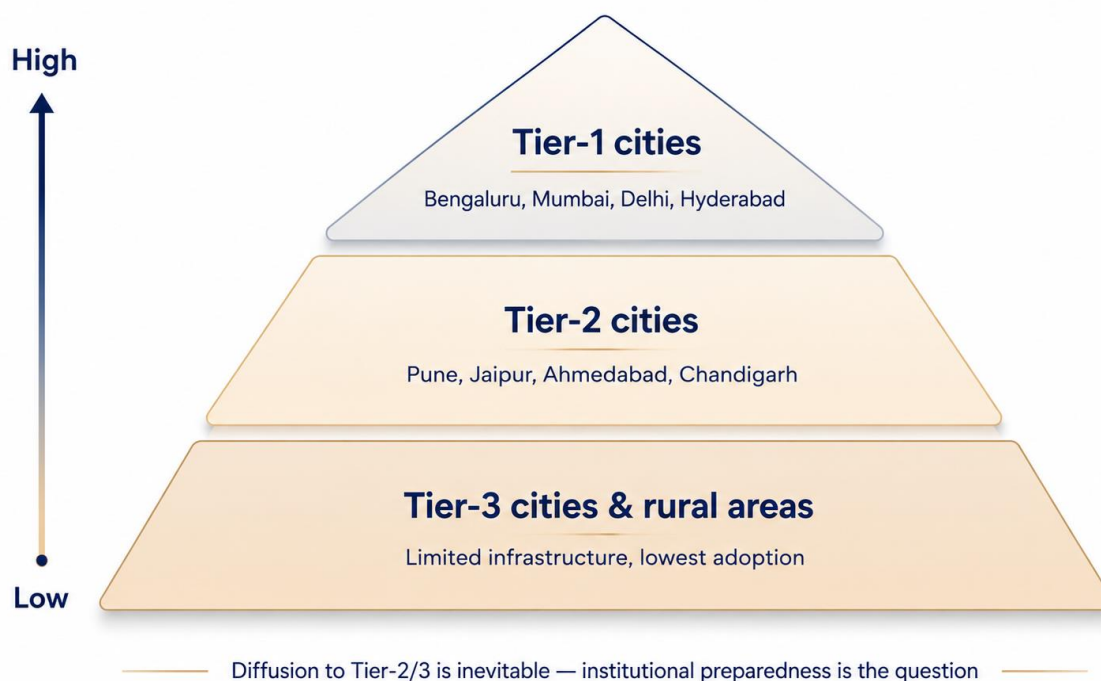


Figure 5.2- Geographic AI Readiness Divide

Adoption remains concentrated in major technology and business centres where digital infrastructure, industry demand, and access to skills are strongest. These ecosystems are benefiting first from productivity gains, AI-enabled workflows, and growing employer demand for AI capabilities.

Yet the evidence suggests that this divide is unlikely to remain confined to metropolitan regions. As AI tools become more affordable, accessible, and integrated into mainstream software platforms, adoption will increasingly spread into Tier-2 and Tier-3 cities. **The critical question is not whether this diffusion will occur, but whether local institutions will be prepared when it does.**

The findings reveal two emerging risks. First, educational institutions outside major urban centres may struggle to update curriculum, infrastructure, and faculty capabilities at the pace required. Second, graduates entering the workforce may face employer expectations that already assume a baseline level of AI familiarity and digital competence.

If these challenges remain unaddressed, geographic disparities could evolve into long-term employability gaps, reinforcing regional inequalities within India's labour market. The next phase of workforce policy must therefore focus not only on AI adoption, but also on ensuring that AI readiness extends beyond established innovation hubs.

5.3 India's AI Potential vs Workforce Preparedness: Insights from the QS World Future Skills Index

The findings of this research are reinforced by the QS World Future Skills Index 2025, which evaluates countries across four dimensions **Skills Fit**, **Academic Readiness**, **Future of Work**, and **Economic Transformation**.

India performs strongly on future workforce potential – driven by demographic scale and AI investment - but lags in areas related to skills alignment and academic preparedness.

This mirrors the findings of this study, where employers reported significant AI skill gaps among graduates and students expressed concerns about their readiness for an AI-driven workplace

Figure 5.3: India's AI Readiness – Insights from QS World Future Skills Index 2025

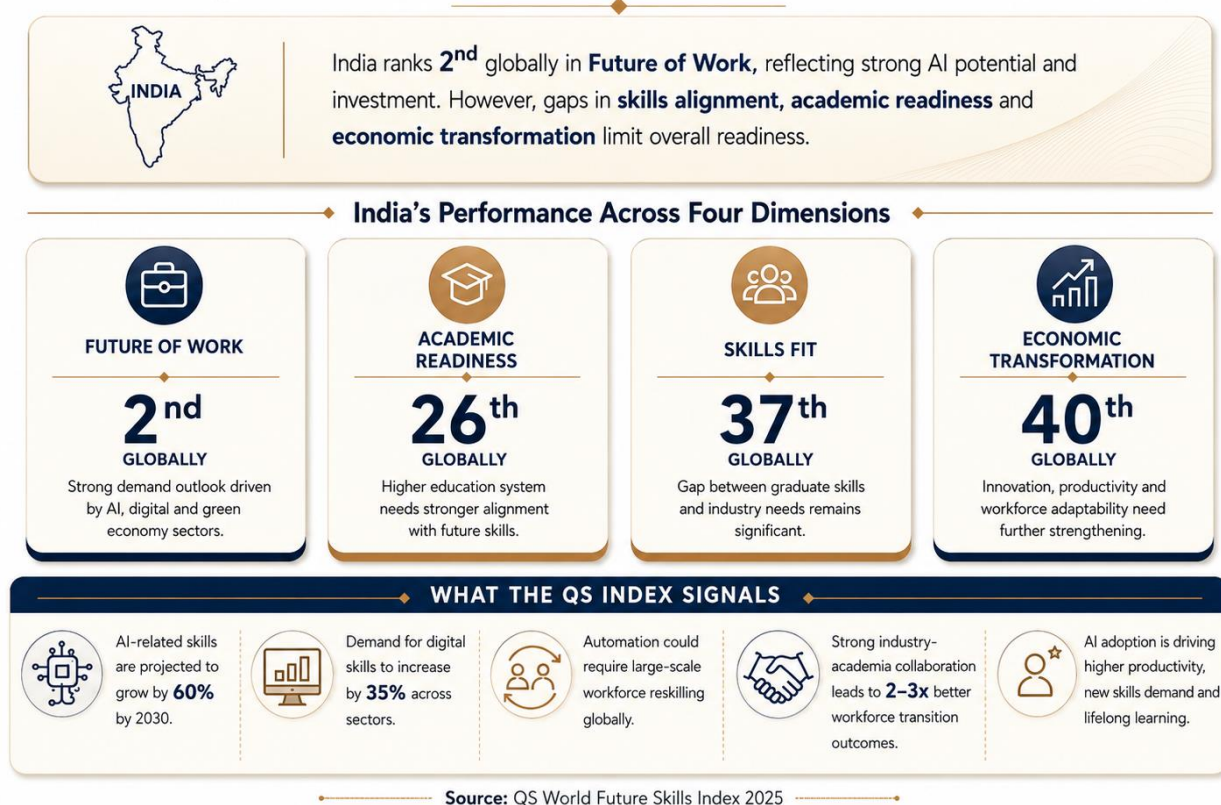


Figure 5.3- India's AI Readiness Paradox

The AI Readiness Paradox is when a country, organisation, or system has the tools and technology for AI, but not the people, skills, or institutions ready to use it effectively.

What the QS Index Signals

- **AI related Skills Demand:** AI-related skills are projected to grow by **60% by 2030**.
- **Digital Skills Demand:** Demand for digital skills is expected to increase by **35%** across sectors; particularly financial services, healthcare and public administration.
- **Graduate Employer Alignment Gap:** Automation could require large-scale workforce reskilling globally.
- **Industry – Academia Collaboration:** Countries with strong industry partnerships show 2-3x better workforce transition outcomes.

Across sectors, AI adoption is driving higher productivity, demand for new skills, and the importance of lifelong learning.

5.4 Three Structural Shifts Reshaping Work

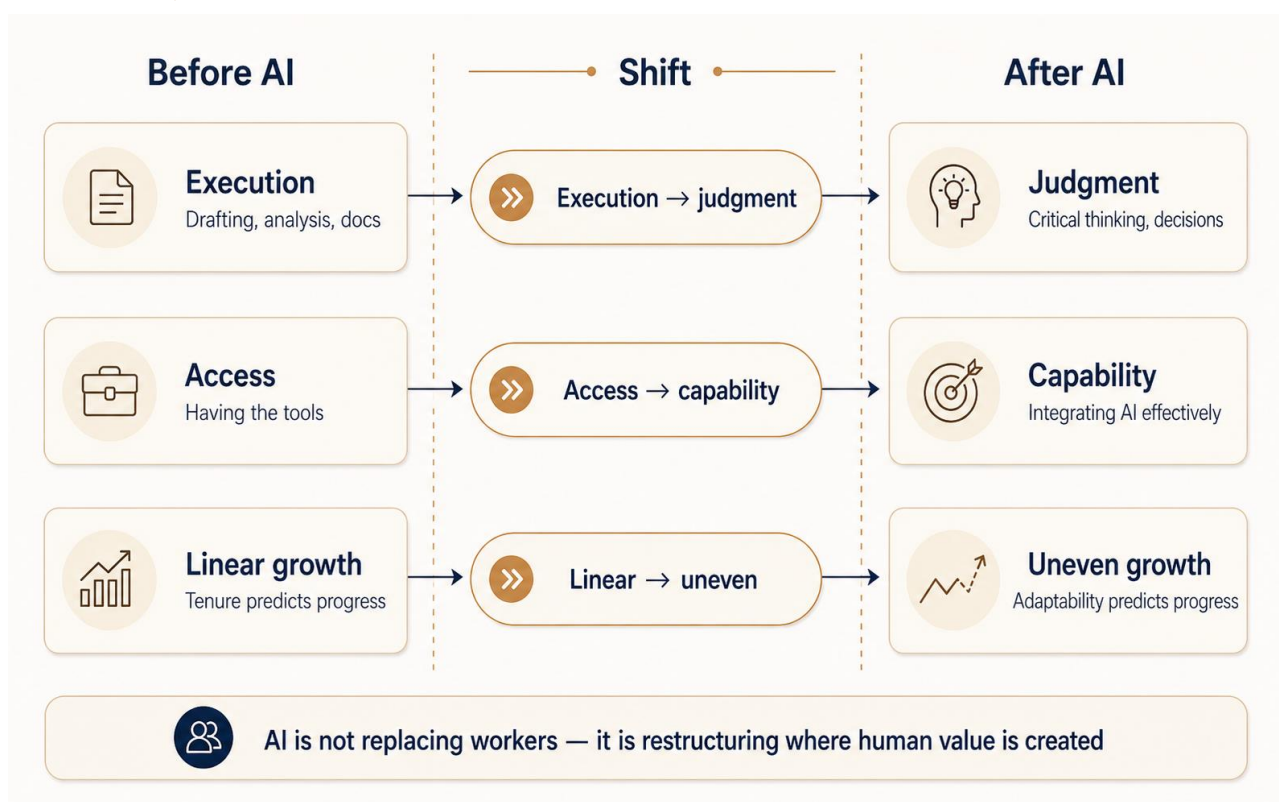


Figure 5.4: Workforce Transformation Framework

Perhaps the most important conclusion emerging from this research is that AI is not primarily a story of job destruction. It is a story of workforce restructuring.

Across all stakeholder groups, the dominant pattern is one of augmentation rather than replacement. Workers report productivity gains and time savings. Employers report increased efficiency. HR leaders expect more task automation within roles rather than widespread workforce reductions.

Three systemic shifts define this restructuring.

FROM EXECUTION TO JUDGMENT



AI is increasingly taking responsibility for execution-oriented tasks such as drafting, documentation, analysis, and information processing. As a result, human value is shifting toward judgment, critical thinking, problem framing, decision-making, and validation. The future workforce will be distinguished less by its ability to produce information and more by its ability to evaluate and apply it.

FROM ACCESS TO CAPABILITY



Access to AI tools is rapidly becoming widespread. Competitive advantage therefore depends less on access itself and more on the capability to use AI effectively. Individuals who can integrate AI into workflows, interpret outputs, and apply judgment are likely to outperform those who merely have access to the technology.

FROM LINEAR TO UNEVEN CAREER GROWTH

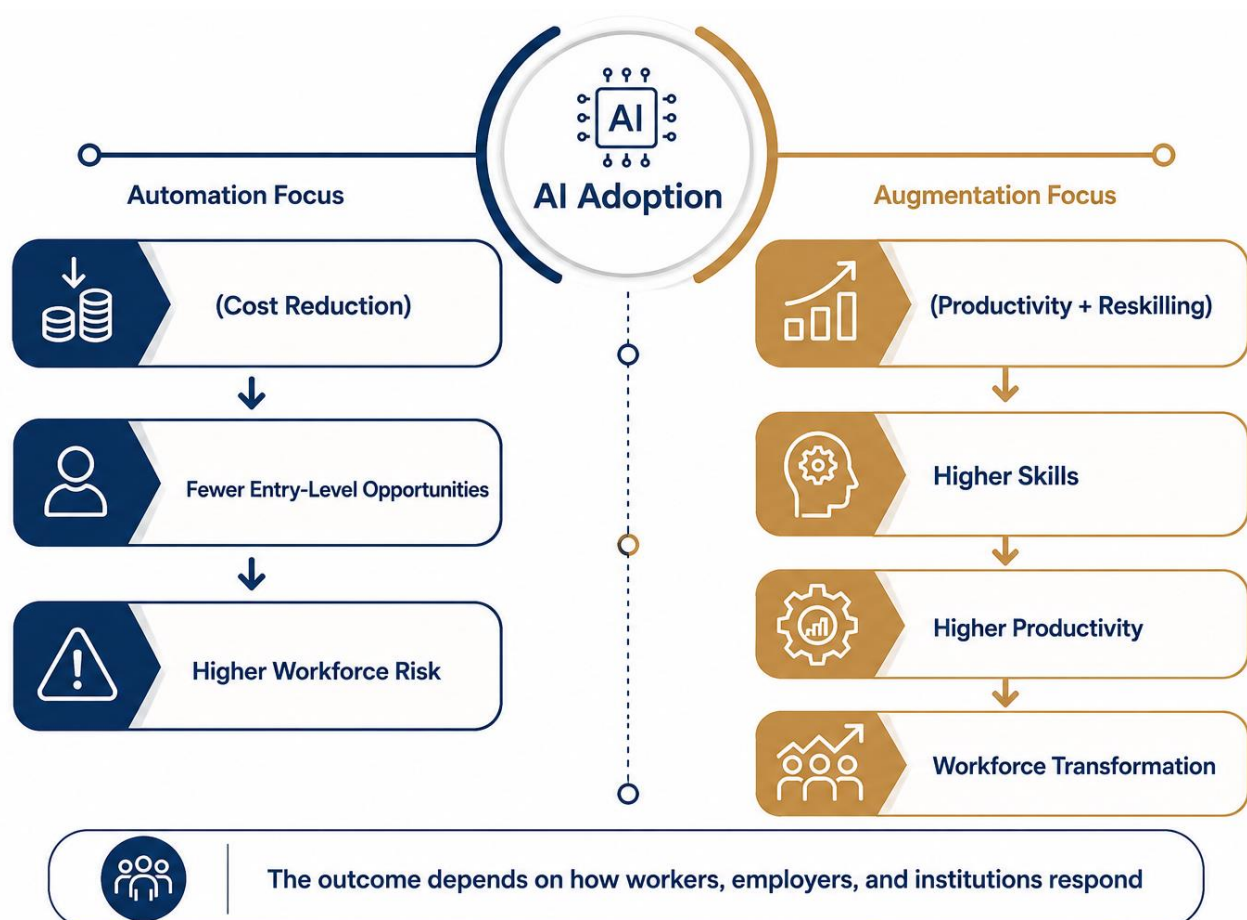


Traditional models of career progression assumed relatively predictable advancement through experience and tenure. AI is creating a more uneven landscape. Workers who actively adopt and leverage AI are accelerating ahead, while others risk falling behind despite similar educational backgrounds or years of experience. Career progression is increasingly determined by adaptability rather than tenure alone.

5.5 The Automation vs. Augmentation Pathway

One of the central questions in the AI debate is whether AI will replace workers or enhance their productivity. The findings from this research suggest that India is currently experiencing **augmentation rather than large-scale displacement**. Across stakeholder groups, AI is primarily automating tasks within jobs rather than eliminating entire roles.

However, the long-term outcome is not predetermined. Three factors will determine whether AI becomes a force for workforce transformation or workforce disruption.



The evidence suggests that AI is not inherently a job-destroying technology. Its impact will depend on how effectively workers, employers, and institutions respond to change. The greatest risk is not widespread unemployment, but a widening divide between those who can adapt with support and those who are left to adapt alone.

Figure 5.5. Automation vs Augmentation Pathway

5.6 Implications for Policy and Practice

The findings of this report point to a simple but important conclusion: the future of work will be shaped less by technological capability and more by institutional readiness.

Three priorities emerge.

First, **AI literacy must become a foundational capability within education systems.** Future workforce readiness will require integrating AI concepts, tools, and applications into mainstream curriculum across all disciplines – not as a special subject, but as a foundational competency equivalent to literacy and numeracy.

Second, **Workforce reskilling must become a continuous process** rather than a periodic intervention. Mid-career professionals require structured opportunities to acquire AI-related competencies before workforce gaps become entrenched and too wide to close.

Third, **Governance as an enabler of trust.** Responsible AI deployment requires clear policies, ethical safeguards, transparency mechanisms, and institutional accountability frameworks to build trust among workers and employers alike.

AI Workforce Transition



Figure 5.6: Institutional Response Framework

Clearly, Trust, responsible AI use, and equitable access to opportunities emerge as recurring priorities.

Why this time is different?

06

The Skills India Will Need in the AI Economy

 Pillar	 Description	 Primary survey evidence	 Outcome
 AI Fluency	Ability to understand, use, and work with AI tools and data effectively in professional contexts	41% of employees name AI/digital skills as the largest graduate gap; only 16% of employees receive formal AI training	Higher productivity, stronger employability, and the capacity to generate compounding career advantage
 Human Advantage	Judgment, creativity, communication, leadership, ethical reasoning, and emotional intelligence – the capabilities AI cannot replicate	Reviewing AI outputs (38%), problem framing (35%) and judgment (26%) are the capabilities respondents say have increased most	Sustainable career growth, leadership potential, and resilience in the face of technological change
 Learning Agility	Ability to continuously learn, unlearn, and reskill as technologies and job requirements evolve	51% of students self-learn online vs 10% via formal courses—learners are already routing around slow institutions	Long-term workforce resilience and the capacity to remain competitive across multiple technology cycles

Table 21: Three Pillars of Workforce Readiness in the AI Economy

Artificial Intelligence (AI) is reshaping the nature of work across industries and occupations. As AI systems become embedded within business processes, the definition of workforce value is changing. Competitive advantage is increasingly determined not by the ability to perform routine tasks, but by the ability to work effectively alongside intelligent systems – and to do so with judgement, creativity, and ethical awareness that AI cannot replicate.

Three broad pillars of workforce readiness emerge as essential for India's future workforce: **AI Fluency, Human Advantage, and Learning Agility.**

6.1 AI Fluency: Building Digital and AI Capability

AI literacy is rapidly becoming a foundational workforce capability. Just as digital literacy became essential during the internet era, the ability to understand and effectively use AI tools is emerging as a baseline requirement across sectors.

For most professionals, this does not mean becoming an AI engineer. Rather, it involves understanding how AI systems function, where they can create value, and where human oversight remains necessary.

 Technical Skill Area	 Why It Matters for India's Workforce
 AI Literacy	Enables effective use of AI tools and systems; understanding of model capabilities, limitations, and failure modes
 Data Analytics	Supports data-driven decision making across all professional functions, not just technical roles
 Intelligent Automation	Improves efficiency and workflow design; ability to identify automation opportunities and implement responsibly
 Prompt Engineering & Computational Thinking	The ability to formulate clear objectives, provide useful context, and critically evaluate AI outputs—Increasingly a primary professional skill; Supports digital problem solving
 AI Governance & Risk Management	Enables responsible AI deployment; understanding of bias, fairness, privacy and accountability frameworks
 Cybersecurity	Protects digital assets and AI systems; understanding of AI-specific attack vectors and governance risks
 Machine Learning Operations	For technical roles: Maintains and monitors AI models

Table 22: Priority Technical Skills for the AI Economy

6.2 Human Advantage: The Capabilities AI Cannot Easily Replicate

While AI excels at processing information and automating routine tasks, it remains limited in areas requiring judgment, context, ethics, creativity, and interpersonal understanding. As routine work becomes automated, human-centric capabilities are becoming more valuable rather than less. The survey findings confirm this: that organisations increasingly value employees who can review AI-generated outputs, frame problems effectively, and make informed decisions based on incomplete or ambiguous information. As routine work becomes automated, the ability to exercise judgment and critical thinking becomes a key source of competitive advantage.

 AI Performs Best	 Humans Perform Best	 Humans + AI Together (India Example)
 Data processing at Scale	Judgment in ambiguous situations	Strategic planning and scenario analysis GCC analyst validating AI – drafted risk reports for a global bank
 Pattern recognition across large datasets	Creativity and novel problem solving	Complex Problem solving AVGC studio using generative tools under creative direction Innovation and product development
 Repetitive tasks	Empathy and relational intelligence	BPO worker shifting from L1 scripts to execution – handling and client escalation Client and Stakeholder Management
 Large-scale analysis	Leadership and culture building	HDFC style redeployment; managers leading mixed human-AI teams
 Content generation from templates	Ethical reasoning and accountability	Decision support in high-stakes contexts MSME owner using vernacular voice AI while owning customer relationships

Table 23: Human-AI Capability Matrix

 Skill	 Importance in AI Economy
 Critical Thinking	Evaluating AI-generated outputs
 Problem Framing	Defining questions and objectives
 Decision-Making	Managing ambiguity and uncertainty
 Creativity	Generating novel solutions
 Communication	Translating insights into action
 Collaboration	Working across teams and technologies
 Emotional Intelligence	Building trust and relationships
 Ethical Reasoning	Ensuring responsible use of AI
 Leadership	Managing human-AI teams

Table 24: Priority Human Skills for the AI Economy

6.3 Human-AI Collaboration: The New Workplace Competency

One of the most significant workforces shifts emerging from the AI era is the growing importance of human-AI collaboration.

The value of AI increasingly depends on the quality of human interaction with the technology. Employees must learn how to define objectives clearly, provide context, refine instructions, and evaluate outputs critically. In many professions, the ability to ask the right questions may become more important than the ability to generate answers independently.

Prompting is therefore not simply a technical skill. It is a combination of communication, analytical thinking, and domain expertise. Effective users understand how to guide AI systems toward relevant outcomes while recognising when human intervention is required.

As AI becomes integrated into daily workflows, the most successful organisations will be those that develop employees who can combine technological capability with human judgment.

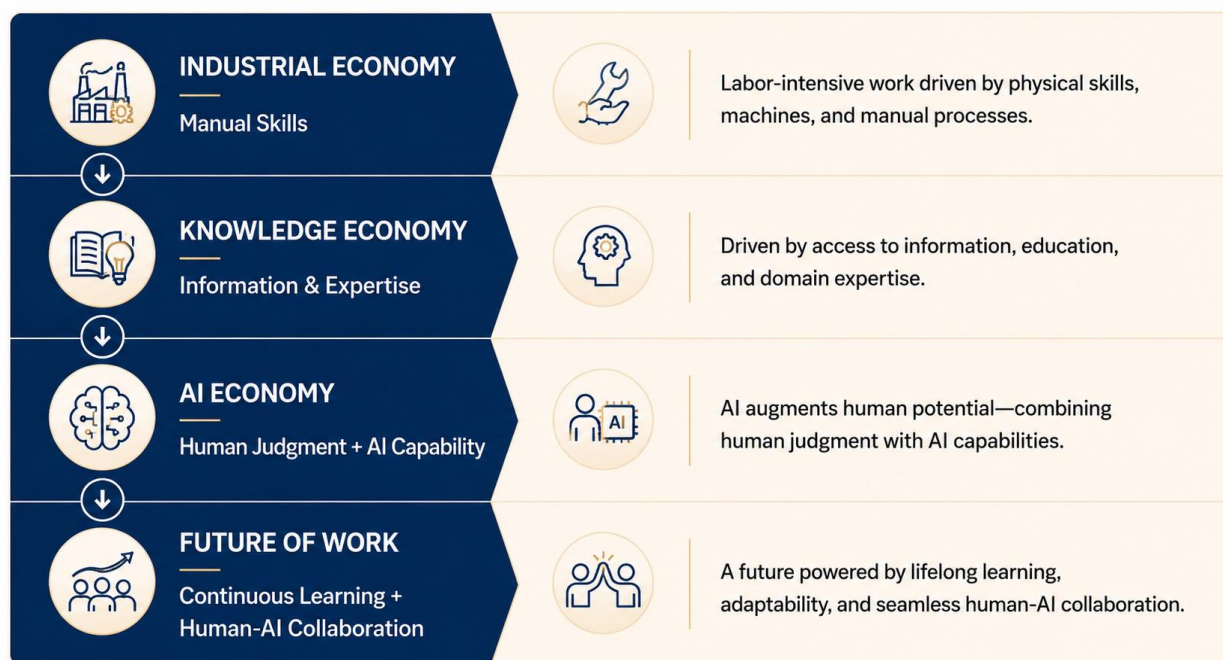


Figure 6.1: Evolution of Workforce Value

6.4 | Learning Agility: The Most Important Future Skill

Perhaps the most important capability in the AI economy is the ability to continuously acquire new skills. Technological change is reducing the lifespan of professional knowledge. Skills that remained relevant for years are now evolving within months. Workforce readiness can no longer be achieved through a single educational qualification obtained early in life.

The survey findings suggest that formal education systems alone are unlikely to meet future workforce needs. Workers will increasingly need to combine formal qualifications with certifications, micro-credentials, online learning, and workplace-based training.

Organisations are beginning to recognise this reality. Many employers are shifting towards continuous learning models that integrate skill development into daily work rather than treating training as a periodic activity. Increasingly, learning and development are becoming strategic investments linked directly to productivity, innovation, and workforce competitiveness.

Future success will require a blend of technical, digital, analytical, and human-centric skills such as communication, adaptability, and critical thinking. AI proficiency is becoming a core workplace competency rather than a specialist capability.

The ability to learn, unlearn, and relearn is therefore emerging as a core workforce capability. In an environment where technologies, business models, and job requirements evolve rapidly, adaptability may become the single most valuable professional attribute.

“



“As AI becomes embedded across industries, the future of work in India will be defined less by job displacement and more by job transformation. Automation will increasingly handle routine and predictable tasks, while augmentation will enhance human capabilities, enabling workers to create greater value. India's demographic dividend can be fully realized only through sustained investments in lifelong learning, digital fluency, and future-ready skills. The most resilient economies will be those that successfully integrate human talent and intelligent technologies to unlock productivity, innovation, and long-term growth.”

Ashwin Fernandes , Chair, QS India, QS Quacquarelli Symonds

”



Figure 6.2: The Lifelong Learning Cycle

6.5 | Why This Matters for India

India possesses one of the world's youngest workforces and one of the largest pools of digital talent. This demographic advantage creates a significant opportunity in the AI era. However, realising this opportunity will require moving beyond the development of a small pool of AI specialists and towards broad-based workforce readiness.

The challenge is one of scale. Millions of students, workers, and professionals will need access to AI literacy, digital capabilities, and lifelong learning opportunities. Employers will need to invest in workforce development, while educational institutions must modernise curricula to reflect changing labour market requirements.

India's competitiveness in the AI economy will ultimately depend on its ability to build a workforce that combines technological capability with human adaptability. Countries that successfully develop these capabilities at scale will be better positioned to capture productivity gains, attract investment, and create high-value employment opportunities.

The AI economy will reward a different combination of capabilities than previous industrial eras. Technical skills remain important, but they must be complemented by human judgment, creativity, communication, and adaptability. The most valuable workers will not be those who compete with AI systems, but those who can effectively harness them to solve problems, generate insights, and create value.

For India, the workforce challenge is not simply preparing more AI specialists. It is building broad-based AI literacy while strengthening the uniquely human capabilities that technology cannot easily replicate. Achieving this balance will require coordinated action across education systems, employers, training institutions, and government.

The future of work will belong not to those who know the most today, but to those who can learn the fastest tomorrow.



The background of the slide is a dark blue field filled with a complex, glowing network of thin, light blue lines. These lines connect numerous small, bright blue and white dots, creating a sense of a vast, interconnected digital or neural network. The lines and dots are more densely packed in some areas, particularly towards the center and right, and more sparse in others, giving the background a dynamic, three-dimensional feel.

07

What Is Working Today:

Lessons from Early Movers

A growing number of organisations, states, and platforms have moved beyond experimentation to implement structured AI skilling, reskilling, and workforce transition programmes at scale.

The examples presented in this chapter illustrate emerging models of workforce adaptation that offer valuable lessons for employers, policymakers, and educators seeking to prepare for the AI economy.

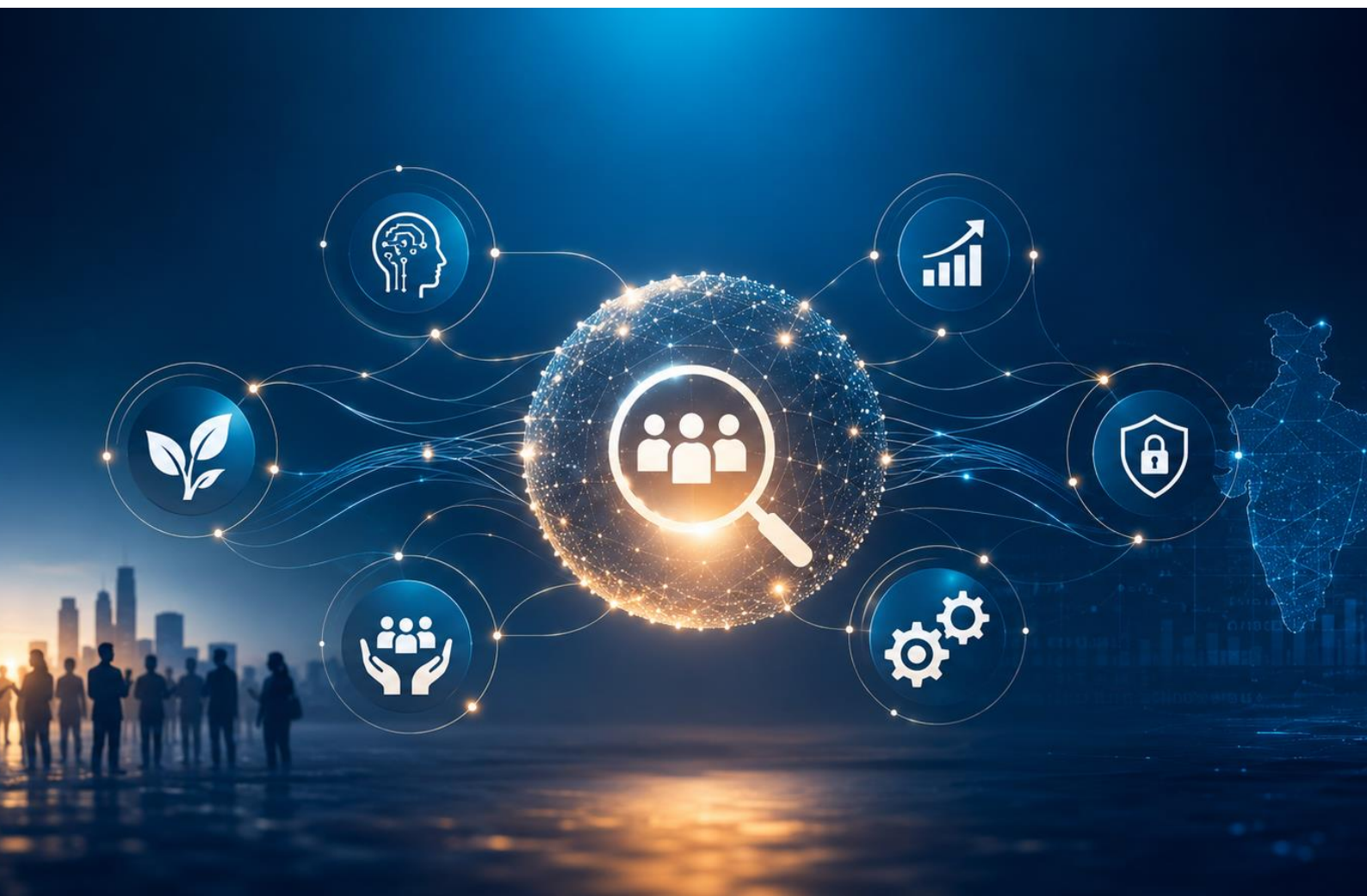
Three categories of interventions stand out:

- Corporate Reskilling Models
- State-Level AI Ecosystem Initiatives
- AI Learning and EdTech Platforms

Together, they provide practical evidence of what is already working in India today.

7.1 | Industry Case Studies: AI Reskilling and Adoption Models

Leading organisations are adopting different models to prepare their workforce and business operations for an AI-enabled future. While large enterprises are investing in structured reskilling academies and internal capability-building programmes, MSMEs are adopting AI through embedded, affordable tools integrated into existing workflows.



7.1.1 Enterprise-led Reskilling Models

 Organization	 Core Approach	 Scale	 Key Outcome
 TCS	Three-tier AI literacy, applied learning and certification model	570,000+ employees AI-ready	AI services pipeline exceeding \$1.5 billion
 Infosys	AI-powered learning platform (Lex) with personalized pathways	275,000 employees trained	5–15% productivity gains
 Wipro	Enterprise-wide AI readiness programme covering all functions	225,000+ employees trained	Workforce-wide AI capability
 HCLTech	Internal talent marketplace linked to AI learning	116,000+ GenAI learners	36,000 internal career transitions
 HDFC Bank	Reskilling and redeployment model	35,000 employees trained	Zero AI-related layoffs

Table 25. Enterprise-led AI Reskilling Models



Figure 7.1 What Makes Corporate Reskilling Work?

Key Patterns Emerging from Enterprise Case Studies

- **Tiered learning models outperform one-size-fits-all approaches**

TCS and HCL Tech demonstrate that separating workforce training into foundational, intermediate, and expert levels creates stronger adoption and more meaningful outcomes.

- **Career pathways matter as much as training**

The strongest programmes connect learning to promotion, certification, redeployment, or internal mobility. Employees engage more deeply when reskilling creates visible career opportunities.

- **Redeployment builds trust**

HDFC Bank's approach demonstrates that workforce transformation becomes easier when employees view AI as a career opportunity rather than a redundancy risk.

7.1.2 AI Adoption Models Among MSMEs

Beyond large enterprises, MSMEs which account for approximately 30% of India's GDP and employ over 110 million people are following a fundamentally different AI adoption pathway. Rather than developing internal AI systems or large-scale training platforms, smaller firms are integrating AI through existing business tools that they already use and trust.

 Provider / Tool	 What MSMEs Use It For	 Why It Fits the Segment	 Estimated MSME Active Users
 Tally Prime (with AI plugins)	Automated invoicing, GST reconciliation, error-flagging before filing	Already the default accounting tool for millions of small firms; AI added to existing workflows rather than a new system	2M+
 Zoho (Books, CRM, Analytics)	Bookkeeping, customer management, business intelligence	Low-cost cloud suite; Zoho's own MSME survey shapes its affordable tier strategy	Over 500,000+
 WhatsApp Business automation (e.g. Wati, AiSensy.)	Customer queries, order-taking, follow-ups	WhatsApp is the primary customer channel for Indian small businesses; near-zero learning curve	Over 1.5M to 2M
 ONDC AI tools (e.g. seller co-pilots)	Product listing, discoverability, and pricing for small online sellers	Let small sellers compete on a shared network without separate e-commerce infrastructure	764,000+ registered sellers/service providers
 Vernacular voice AI (e.g. Bhashini-based tools, regional voice agents)	Voice-first customer support and queries in Hindi and regional languages	Serves owners and customers who do not operate in English — the majority outside metros	300,000+(Scaling rapidly)

Table 26. MSME AI Adoption: The Consumption Model

These examples highlight that AI adoption pathways vary significantly by organisational size. Large enterprises are focusing on workforce transformation through structured learning ecosystems, while MSMEs are adopting AI through practical, low-cost solutions embedded within everyday operations.

7.2 State-Level AI Ecosystem Initiatives

A small group of states have moved from AI policy discussions to implementation.

While most states remain in the planning phase, several have established institutional structures that support AI adoption, skilling, and innovation.

 State	 Strategic Focus	 Distinguishing Feature
 Telangana	 AI Mission, HPC infrastructure, government deployment	 Most comprehensive AI ecosystem model
 Karnataka	 GCC expansion and AI employment generation	 Demand-led workforce strategy
 Tamil Nadu	 Ethical AI governance and public-sector deployment	 Governance-first model
 Gujarat	 Financial services AI ecosystem at GIFT City	 Sector-focused innovation model
 Rajasthan	 AI CoE (Center of Excellence)	 AI Adoption and Governance  Capacity building, Skilling and AI Literacy  AI Incentive for Industries

Table 27. State-Level AI Initiatives

Key Lessons for other States

- Dedicated AI Missions create institutional continuity**

States with dedicated missions are progressing faster than those relying solely on existing IT departments.

- Demand and supply must evolve together**

The most successful ecosystems simultaneously create jobs and build talent pipelines.

- Fewer, deeper partnerships outperform broad MoU-driven approaches**

States that focus on strategic implementation partnerships are generating stronger outcomes than those pursuing multiple low-engagement collaborations.

7.3 The Role of EdTech Platforms

EdTech is becoming the fastest bridge between workforce demand and education system response.

Traditional curricula often struggle to keep pace with technological change. EdTech platforms are filling this gap by offering flexible, industry-relevant, and scalable AI learning pathways.

 Platform	 Model	 Primary Learner Segment
 upGrad	 University-linked professional reskilling	 Working professionals
 NPTEL / SWAYAM	 Public digital learning platform	 Students and lifelong learners
 Coursera	 Global industry certifications	 Students and professionals
 GUVI	 Employer-linked vernacular learning	 Tier 2/3 learners and job seekers

Table 28. Emerging AI Learning Models



Figure 7.3 India's Emerging AI Learning Ecosystem

Key Patterns from EdTech

● Demand is not the constraint

Rapid growth in AI course enrolments demonstrates strong learner interest.

● Employer recognition remains critical

Platforms that connect learning to employment outcomes generate stronger engagement.

● Public digital infrastructure remains underutilised

NPTEL and SWAYAM already provide scalable and affordable AI learning pathways but require stronger industry recognition and wider accessibility.

7.4 What Works Across All Models

While the organisations, states, and platforms profiled in this chapter operate in different contexts, several common success factors emerge. Early adopters demonstrate that augmentation strategies deliver better outcomes than simple automation approaches.



Figure 7.4 Success Factors for Workforce Transformation

Key Insights

● **Reskilling Works When It Is Linked to Outcomes**

The most successful initiatives connect training to certification, internal mobility, redeployment, promotion, or employment opportunities.

● **Leadership Commitment Accelerates Adoption**

Programmes supported directly by CEOs, senior leadership teams, or state governments achieve greater scale and organisational acceptance.

● **AI Readiness Requires Ecosystems, Not Isolated Programmes**

Skills development, employment generation, governance, and infrastructure must evolve together.

● **Redeployment Is More Effective Than Redundancy**

The strongest workforce transition models focus on moving workers into new roles rather than removing them from the workforce.

● **Scale Is Achievable**

The experience of India's leading IT firms demonstrates that AI reskilling can be delivered to hundreds of thousands of employees within a relatively short period when supported by leadership commitment and digital learning platforms.

● **For Most Firms, Affordability Beats Programme Design**

Structured L&D works for large enterprises, but it is only one model. MSMEs - where most of the workforce sits, adopt AI only when it is low-cost and embedded in tools they already use. Ecosystem-level enablement, not corporate training, is the lever for this segment.



08

The Road Ahead:

Recommendations for building an AI-Ready

The findings of this research point to a clear conclusion: India is not facing an immediate crisis of large-scale job displacement. It is experiencing a gradual but profound restructuring of work that, managed well, can be a source of immense competitive advantage and if managed poorly, will deepen inequality and compromise economic mobility for a generation.

The Recommendations logic

India does not have a shortage of AI schemes - it has a shortage of **scale, alignment, and reach**. Programmes such as SOAR, FutureSkills PRIME, NAPS, PMKVY, and the IndiaAI Mission already exist and, in several cases, are working well. The task before government, industry, and educational institutions is to deepen, connect, and scale the ones already in motion, and to close the specific gaps this research has identified.

The recommendations that follow are organised by stakeholder - Government and Policymakers, Universities and Training Institutions, and Industry, Employers and Workforce - and structured along a consistent logic: each recommendation is anchored in a specific research finding, references a live initiative or proven practice wherever one exists, and proposes a concrete, low-friction action that builds on existing infrastructure rather than requiring new institutions.



8.1 Recommendations For Government and Policymakers

Role: Government's role is to fund at scale, align fragmented schemes, and ensure AI readiness reaches beyond the metros.

 Theme	 Research insight	 Recommendations
 National Coordination	India has moved fast on AI policy, but schemes remain fragmented across ministries.	Put SOAR, FutureSkills PRIME, NAPS, and the one-million-youth scheme on one dashboard under MSDE, tracking a single number: how many people finished and got a job or promotion.
 Workforce Reskilling	Reskilling remains under-prioritized despite rising skill requirements across sectors.	Add a 40-hour AI module to existing PMKVY centres for workers in clerical, BPO, and support roles, the jobs automating first, instead of building a new programme.
 Affordable Access	Cost and access are the leading barriers workers and students face in learning AI.	Give workers earning under a set threshold a voucher (e.g. ₹2,500) redeemable for any approved AI course on SIDH, paid directly to the platform.
 Regional Inclusion	AI opportunity is concentrated in four metros; Tier-2/3 and the North-East risk exclusion.	Turn existing ITIs and polytechnics in Tier-2/3 districts into AI skilling hubs, add tools and trained instructors to buildings that already exist, rather than constructing new centres.
 AI Governance	36% of organisations lack a formal AI governance framework, while employees increasingly expect workplace policies.	Publish a free, one-page AI-use policy and DPDP checklist any firm can adopt as-is, hosted on the MSME and MeitY portals.

Table 29. Government and Policy Priorities

Strategic Priority



India should prioritise large-scale reskilling, industry-academia partnerships, and AI literacy across education and employment systems. Policies must focus on enabling workers to transition into AI-enhanced roles while ensuring inclusive growth and opportunity. Workforce readiness should be treated as national infrastructure - funded as seriously as physical and digital infrastructure.

8.2 Recommendations for Universities and Training Institutions

Role: Awareness programmes already exist; the gap is depth, faculty capacity, and reach. The priority is converting exposure into employable capability.

 Theme	 Research Insights	 Recommendations
 Curriculum Reform	41% of employers identify AI and digital skills as the largest gap among graduates.	Make one credited AI-and-data literacy course compulsory for every degree, arts and commerce included through UGC/AICTE, the way environmental studies already is.
 Faculty Development	31% of students cite lack of guidance or mentorship as their top barrier to learning AI.	Pay and certify existing college teachers to spend a term being trained in AI, funded from the ₹500 Cr CoE, you cannot teach AI without trained teachers first.
 Industry Alignment	Employers report a persistent gap between graduate capability and workplace expectations.	Make the final-year project a real AI task set and graded by a local employer, so students graduate with something they have actually built.
 Equitable Access	AI opportunity and readiness are concentrated in major urban centres.	Run every government AI course through Bhashini so it is available in Hindi and regional languages, not only English.

Table 30. Education Institute Priorities

Strategic Priority

AI literacy must become a foundational competency across all disciplines — not confined to computer science.



8.3 Recommendations for Industry, Employers and Workforce

The survey shows task automation, not mass layoffs but entry-level pathways are narrowing and the user/non-user divide is widening. Policy and employer practice should make redeployment the default and reskilling a right.

 THEME	 RESEARCH INSIGHTS	 RECOMMENDATIONS
 Mid-Career Reskilling	 AI automates tasks within jobs; the compounding skills gap puts mid-career workers most at risk.	➤ Offer short evening/ weekend AI courses for working adults and list who completed them on the National Career Service portal so employers can find them.
 Workforce Trust	 HDFC Bank's reskill-and-redeploy model achieved zero AI-related layoffs.	➤ Ask firms that take government AI grants to show they tried to retrain and move staff before cutting roles, as HDFC Bank did with zero AI layoffs.
 Entry-Level Pathways	 40% report traditional entry-level tasks are already AI-handled; the early-career ladder is narrowing.	➤ Use the existing NAPS apprenticeship subsidy to place graduates in AI-assisted junior roles, so they learn on the job as the old entry tasks disappear.
 Career Mobility	 AI-enabled employees report stronger career outcomes and performance benefits.	➤ Encourage employers to count AI certifications in appraisals and internal job postings, so staff have a reason to learn.

Table 31. Employer Priorities

Strategic Priority



The most successful firms combine AI adoption with workforce development and trust not just speed of deployment. The enterprise practices already documented in Chapter 7 (TCS's tiered AI literacy model, Infosys' personalised learning platform Lex, HCLTech's internal AI talent marketplace, and HDFC Bank's reskill-and-redeploy commitment) are not isolated examples - they are templates that other employers, with government encouragement, can adapt at lower cost than building new programmes from scratch.

8.4 Building an AI-Ready Workforce Ecosystem

No single stakeholder can manage this transition alone. The greatest gains come when government, education, industry, and the workforce move in alignment.

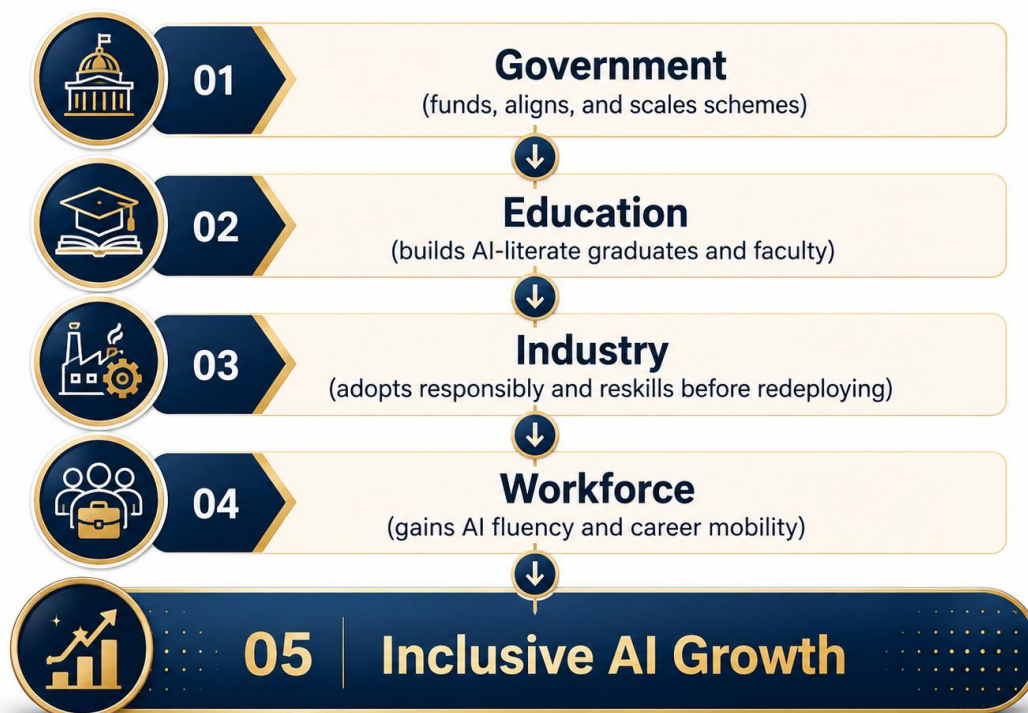


Figure 8.1: Building an AI-Ready Workforce Ecosystem

Three ecosystem priorities emerge:

- **Strengthen Industry–Academia Collaboration**

Universities and employers should jointly design curricula, certifications, internships, and project-based learning opportunities.

- **Build Continuous Learning Infrastructure**

Learning should become a lifelong process rather than a one-time educational event. Public and private institutions must work together to expand access to affordable, high-quality AI learning opportunities.

- **Ensure Inclusive Adoption**

Women, rural learners, workers in smaller cities, and underrepresented groups must have equitable access to AI education, training, and employment opportunities.

 Priority	 What it Requires	 Connects To
 Strengthen Industry–Academia Collaboration	Universities and employers should jointly design curricula, certifications, internships, and project-based learning opportunities.	Builds directly on Recommendation 8.2 (Industry Alignment) and the Industry–Academia AI Consortium model
 Build Continuous Learning Infrastructure	Learning should become a lifelong process rather than a one-time educational event. Public and private institutions must work together to expand access to affordable, high-quality AI learning.	Builds on the National Career Service listings and AI Learning Vouchers (Recommendations 8.1 and 8.3)
 Ensure Inclusive Adoption	Women, rural learners, workers in smaller cities, and underrepresented groups must have equitable access to AI education, training, and employment opportunities.	Builds on the Bhashini-enabled course delivery (Recommendation 8.2) and Microsoft ADVANTA(I)GE INDIA's women's strand (Chapter 2)

Table 32: Three Ecosystem Priorities

8.5 | India's AI Workforce Transition: The Road Ahead

India's AI moment will not be decided in a research lab or a policy document. It will be decided in the classroom of a polytechnic in Rajasthan, in the back office of a mid-sized manufacturer in Coimbatore, and in the reskilling journey of a BPO worker in Hyderabad who was hired for tasks an AI tool now handles faster.

India's AI workforce future will be shaped by the decisions taken now through 2030 on skilling, curriculum reform, institutional coordination, and governance. **2027 is the execution checkpoint** - the year by which most of this chapter's recommendations should be operational and **2030 is the outcome year**, aligned with the UN 2030 Agenda and the point at which India will know whether it is on track for the AI-accelerated 2035 trajectory NITI Aayog has outlined. Three scenarios illustrate what 2030 could look like, depending on how the 2026–2027 decisions play out.

 The optimistic scenario:	Government, industry, and education move together: skilling reaches beyond the metros, curriculum are reformed, and AI becomes a tool that widens opportunities across the workforce
 The baseline scenario:	Large firms and city workers adapt while the rest are left waiting. This leads to the divide being calcified.
 The adverse scenario:	Automation moves faster than reskilling, entry-level jobs disappear before new pathways form, and the gap between those who can use AI and those who cannot become structural.

Table 33: Future of Work Scenarios in the AI Era

The difference between these outcomes is not access to technology - India will have that regardless. It is whether institutions move fast enough to prepare people to use it.

1. Optimistic Scenario

India executes on policy, firms invest in reskilling, and education systems reform at pace. AI augments rather than displaces.

Indicative 2030 markers:

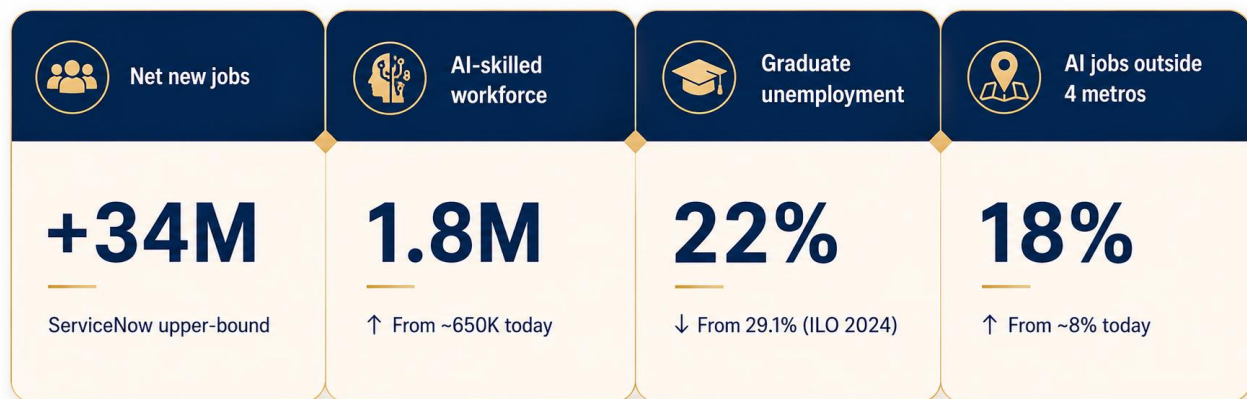


Figure 8.2: Workforce Metrics: AI Optimistic Scenario

What drives to the outcome?

- **PMKVY + SOAR scaled:** 40-hour AI modules reach 5M workers by 2027; completion-to-placement tracking introduced.
- **UGC/AICTE mandate lands:** Compulsory AI literacy across all degree streams by 2026–27 academic year.
- **HDFC model adopted widely:** Large firms tie AI grants to reskill-before-cut commitments; NAPS extended to AI-assisted junior roles.
- **Tier-2 ITIs functional:** 174 approved AI labs become functional; Coimbatore, Bhubaneswar, Ahmedabad emerge as secondary hiring centres.
- **Gender gap narrows:** Microsoft ADVANTA(I)GE 100K women target met; female graduate unemployment falls from 34.5% toward 27%.

2. Baseline scenario

Adoption accelerates in large firms and metros. Schemes continue but remain fragmented. The divide calcifies.

Indicative 2030 markers:

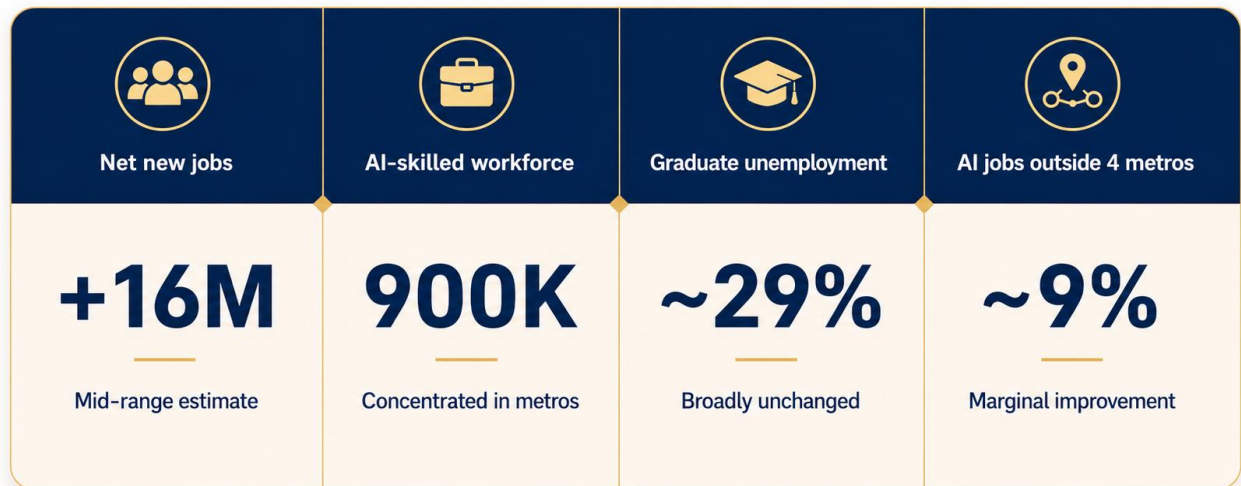


Figure 8.3: Projected Workforce Indicators: Baseline Scenario

What keeps us there?

- Schemes exist but limited scale is achieved:** PMKVY, SOAR, and FutureSkills PRIME continue but remain on separate dashboards with no unified outcome tracking.
- Curriculum reform is slow:** UGC/AICTE guidelines issued but uptake is uneven; engineering colleges lead, arts and commerce lag by 2–3 years.
- Less focus on MSME's :** Large tech firms adopt AI rapidly; MSMEs which employ 110M people lack access, support, or incentive.

3. Adverse Scenario

Automation outpaces reskilling. Entry-level pathways disappear before new ones form. The workforce divide becomes structural.

Indicative 2030 markers:

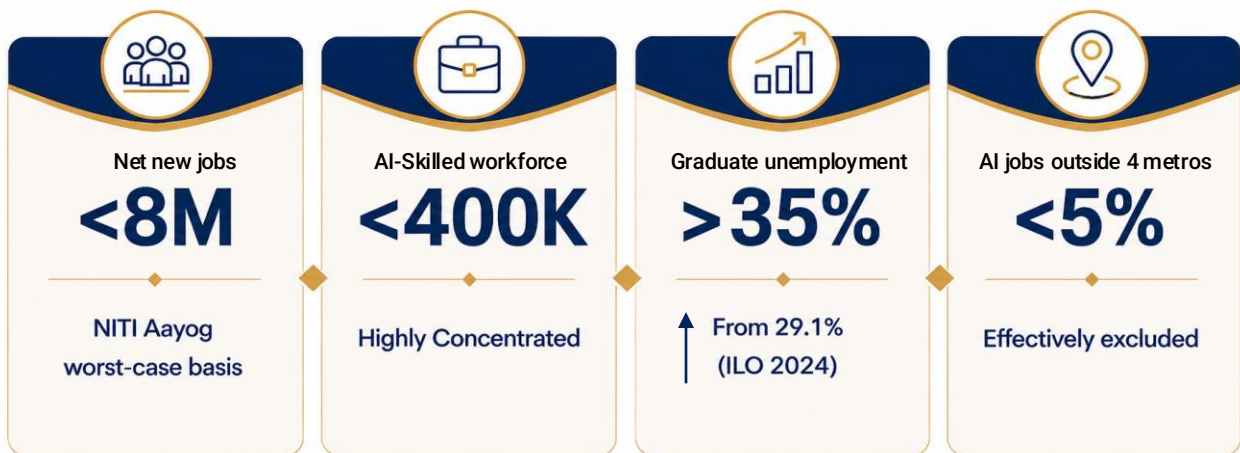


Figure 8.4: Adverse Scenario: AI Adoption and Employment Risks

What could tip the scale towards this outcome

- Reskilling safety net remains absent:** If displaced workers in BPO, data entry, and clerical roles have no transition pathway, automation-driven disruption can compound faster than the system can absorb.
- Curriculum reform is delayed:** A UGC mandate that lands after 2027 means three consecutive graduate cohorts (roughly 21–24 million young people) enter the workforce without foundational AI literacy.
- Skilling does not reach women and rural learners:** Programmes that remain English-only and urban-facing will structurally exclude large segments of the workforce before the transition has even fully formed.
- Governance frameworks do not keep pace with adoption:** Without workplace AI policies in place, workers carry the burden of a rapidly changing environment with no institutional accountability on the other side.



WHAT 2030 DETERMINES FOR THE DECADES THAT FOLLOW



Whichever of these three scenarios materialises by 2030 will shape India's position on the trajectories. **The Optimistic Scenario** keeps India on track for the AI-accelerated GDP path, NITI Aayog has set out for 2035-capturing the full AI dividend and the multi-million strong reskilled workforce that underpins it.



The Baseline Scenario likely still delivers AI-driven growth but concentrated in large firms and metro regions, with the productivity gains in healthcare, agriculture, and MSMEs identified by NITI Aayog left largely unrealised.



The Adverse Scenario risks a structural divide that compounds well beyond 2030, making the broader Visit Bharat @2047 vision considerably harder to achieve, regardless of how advanced India's AI infrastructure becomes.



8.6 | Conclusion: Five Things This Research Tells Us

The evidence suggests that AI bigger impact will be on how work is done, what skills matter, and how fast workers, businesses, and institutions can adjust.

1. AI Is Changing Work More Than Replacing Jobs

AI is transforming the nature of work in many jobs. More and more routine and repetitive tasks are being automated or assisted by AI tools, while human skills like judgement, creativity, communication, and decision-making remain essential. The future workplace will likely depend on how well people integrate AI into their work, rather than AI completely replacing human workers.

1. Productivity Gains Depend on People, Not Just Technology

AI is already helping companies become more efficient, reduce manual tasks, and make faster decisions. But simply having access to AI tools will not ensure productivity gains. The main difference will be how well employees and organisations leverage these tools.

1. The Skills Gap Will Define the Next Phase of Workforce Change

A key challenge in AI adoption is the gap between those who can effectively leverage AI and those who cannot. As AI becomes part of daily work, AI-related skills are likely to influence job opportunities, career advancement, and business success. Making practical AI training common will be vital to making this transition fair and inclusive.

1. Education and Training Systems Need to Keep Pace

There is a growing disconnect between the skills employers need and how students and workers are currently being trained. Education systems must move beyond raising awareness of AI to focus on practical applications, stronger ties with industry, and continuous learning that supports individuals throughout their careers.

1. India Has the Building Blocks, but Execution Will Matter

India enters this transition with important advantages: a young workforce, solid digital infrastructure, technology capabilities, and rising investment in AI. The next phase will hinge on turning these strengths into readiness across the workforce — extending AI capabilities beyond large companies and tech roles to smaller businesses, other sectors, and workers in different regions.

“



From an investor's perspective, the most exciting companies are not those replacing humans with AI, but those enabling humans to do more with AI. The future belongs to augmented intelligence, not artificial intelligence alone.

Anil Joshi, Founder & Managing Partner, Unicorn India Ventures

”

Conclusion

The findings of this report suggest that the future of work in India will be defined by the speed with which workers, institutions, and organisations adapt to technological change.

AI is already reshaping tasks, skills, and productivity expectations across the economy. Those who successfully combine AI capability with human judgement, creativity, adaptability, and continuous learning will be best positioned to thrive.

India's opportunity is substantial. With the right investments in skills, education, governance, and workforce readiness, AI can become a catalyst for productivity, innovation, and inclusive economic growth.

The challenge before us is clear. The technology is advancing rapidly. The imperative now is to ensure that people advance with it.

The future of work in India will be determined by how effectively India prepares its workforce to work alongside Artificial Intelligence (AI).

Annexure

A. Sample & Methodology

Research Design: The study was designed to generate a grounded, evidence-based picture of how artificial intelligence is reshaping workforce dynamics in India with a specific focus on understanding the experience of workers, employers, students, and policymakers in the formal sector. The research was conducted between April and May 2026. It combines primary survey data with secondary literature synthesis, drawing on published data from national and international sources including NASSCOM, the International Labour Organization (ILO), the World Bank, NITI Aayog, and Stanford University's Global AI Vibrancy Index to situate findings within the broader policy and economic landscape.

A structured stakeholder engagement was adopted. This approach was chosen to capture both the scale and the texture of AI's workforce impact across respondent groups. The seven hypotheses examined in the study (see Table 18) were developed at the outset to provide a structured analytical framework. Each hypothesis was tested against the primary survey data and cross-validated against secondary evidence, ensuring that findings are grounded in multiple evidence streams rather than a single data source.

Scope and Sectoral boundary: The study is explicitly scoped to India's formal sector. This includes organised enterprises across manufacturing, services, information technology, financial services, education, and public administration, sectors where employment relationships are documented.

The informal sector, which accounts for approximately 80–85% of total employment in India, falls outside the boundaries of this study. This is a deliberate methodological choice reflecting the nature of AI adoption, which is currently concentrated in formal, organised enterprises with the institutional capacity to integrate AI tools into workflows. Findings should not be generalised to the informal economy without appropriate qualification.

This boundary also reflects data availability constraints. Reliable, comparable data on AI adoption and skill requirements is substantially more accessible in the formal sector, where employer records, HR systems, and structured education pipelines exist. The primary survey captured responses from 345 participants. The sample was structured to ensure representation across five stakeholder groups. The survey was administered across 15 states and union territories, organised into five regional clusters to ensure that findings reflect the diversity of India's economic and industrial landscape.

Data Collection: The instrument was designed to capture both behavioural data (how respondents are currently using or experiencing AI) and attitudinal data (how respondents perceive the risks, opportunities, and governance requirements associated with AI adoption). Questions were calibrated to the specific role of each stakeholder group.

B. Survey Questionnaire

Research Design: The study was designed to generate a grounded, evidence-based picture of how artificial intelligence is reshaping workforce dynamics in India with a specific focus on understanding the experience of workers, employers, students, and policymakers in the formal sector.

The research was conducted between April and May 2026. It combines primary survey data with secondary literature synthesis, drawing on published data from national and international sources including NASSCOM, the International Labour Organization (ILO), the World Bank, NITI Aayog, and Stanford University's Global AI Vibrancy Index to situate findings within the broader policy and economic landscape.

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Key Survey Questions by Stakeholder Profile

Employees

1. **How is AI currently affecting your role?**
 - a) AI assists me in some tasks
 - b) Many tasks are now automated
 - c) No impact yet
 - d) My role has significantly changed
2. **Which tasks are most frequently automated by AI?**
 - a) Data analysis and reporting
 - b) Data entry or documentation
 - c) Customer communication or support
 - d) No tasks currently automated
3. **How important are workplace AI policies?**
 - a) Extremely important
 - b) Important but not urgent
 - c) Somewhat important
 - d) Not very important
4. **How has AI changed your daily work?**
 - a) Improves accuracy and productivity
 - b) Saves time on repetitive tasks
 - c) Has not changed work significantly
 - d) No change / do not use AI
5. **Do you believe workers without AI skills will face career growth challenges?**
 - a) Yes, strongly agree
 - b) Somewhat agree
 - c) Neutral
 - d) Disagree

Founders / Employers

1. **Do AI-enabled employees outperform their peers?**
 - a) Yes, significantly
 - b) Yes, somewhat
 - c) Not sure
 - d) No
2. **Has AI reduced execution time in your organization?**
 - a) Significantly reduced
 - b) Somewhat reduced
 - c) No noticeable reduction
 - d) Not sure
3. **What impact has AI had on your workforce?**
 - a) New roles have been created
 - b) Some roles have been reduced
 - c) Roles changed but were not reduced
 - d) No major changes
4. **How are hiring expectations changing for entry-level talent?**
 - a) Greater emphasis on AI and digital familiarity
 - b) New AI and data roles are emerging
 - c) Traditional roles are being redesigned
 - d) Hiring strategies remain unchanged
5. **What are the biggest skill gaps among graduates and new hires?**
 - a) AI and digital technology skills
 - b) Analytical and problem-solving ability
 - c) Communication and teamwork
 - d) Domain-specific technical knowledge

Key Survey Questions by Stakeholder Profile

HR Leaders

1. **What impact do you expect AI to have on the workforce?**
 - a) More task automation but same roles
 - b) Creation of new job roles
 - c) Reduction in workforce
 - d) No major change expected
2. **Which tasks have been most affected by AI?**
 - a) Administrative and repetitive tasks
 - b) Data processing and analysis
 - c) Customer service interactions
 - d) Strategic decision-making support
3. **What are the top skill gaps among graduates and employees?**
 - a) AI and digital technology skills
 - b) Analytical and problem-solving ability
 - c) Communication and teamwork
 - d) Domain-specific technical knowledge
4. **Does your organization provide AI training to employees?**
 - a) Yes, formal training programmes
 - b) Some guidance or workshops
 - c) Only self-learning is encouraged
 - d) No training provided
5. **What is the current state of AI governance in your organization?**
 - a) Comprehensive framework implemented
 - b) Some internal guidelines are in place
 - c) Policies are being developed
 - d) No governance framework exists

Students

1. **How prepared do you feel for AI-driven workplace changes?**
 - a) Very prepared
 - b) Somewhat prepared
 - c) Slightly prepared
 - d) Not prepared
2. **Are you actively learning AI skills?**
 - a) Through formal courses
 - b) Through online platforms
 - c) Planning to start soon
 - d) Not currently learning
3. **What challenges do you face in learning AI?**
 - a) Lack of guidance or mentorship
 - b) Limited access to training resources
 - c) Lack of technical background
 - d) High cost of courses
4. **Which learning pathway are you using?**
 - a) Formal courses
 - b) Online self-learning platforms
 - c) Industry certifications
 - d) Not currently pursuing AI learning
5. **How do you think AI will affect entry-level career opportunities?**
 - a) Traditional tasks are being automated
 - b) Entry-level roles require stronger technical skills
 - c) AI has created new opportunities
 - d) No visible impact yet

Key Survey Questions by Stakeholder Profile

Policymakers

1. What should be the government's highest priority regarding AI and employment?

- a) Integration of AI into school and university education
- b) AI regulation and governance
- c) Workforce reskilling programmes
- d) Expansion of digital infrastructure

2. Which support mechanisms would help workers adapt to AI?

- a) Access to AI tools and learning platforms
- b) Skill development programmes
- c) Education and training reforms
- d) Career guidance and mentoring

3. Which interventions are most important for improving AI readiness?

- a) Curriculum reforms
- b) Public-private partnerships
- c) AI literacy programmes
- d) Regional skilling centres

4. What are the biggest challenges to responsible AI adoption?

- a) Lack of AI governance expertise
- b) High implementation costs
- c) Unclear regulations
- d) Resistance from employees

List of Abbreviations.

Abbreviation	Definition
AI	Artificial Intelligence
HR	Human Resources
FICCI	The Federation of Indian Chambers of Commerce and Industry
AVGC-XR	Animation, Visual Effects, Gaming, Comics, and Extended Reality
WEF	World Economic Forum
API	Application Programming Interface
IT	Information Technology
SOAR	Skilling for AI Readiness
NIELIT	National Institute of Electronics & Information Technology
NASSCOM	National Association of Software and Service Companies
B, M, K,	Billion, Millon, Thousand
BCG	Boston Consulting Group
TCS	Tata Consultancy Services
MLOps	Machine Learning Operations
ML	Machine Learning
VC	Venture Capital
R&D	Research and Development
STEM	Science Technology Engineering Math
UPI	Unified Payments Interface
ONDC	Open Network for Digital Commerce
DPI	Digital Public Infrastructure
QS	Quacquarelli Symonds
GCC	Global Capability Centre
GIFT	Gujarat International Finance Tec-City
NPTEL/SWAYAM	National Programme on Technology Enhanced Learning/ Study Webs of Active-Learning for Young Aspiring Minds
GUVI	Grab Your Vernacular Imprint
CEO	Chief Executive Officer
PMKVY	Pradhan Mantri Kaushal Vikas Yojana
MSME	Micro Small and Medium Enterprises
IIT	Indian Institute of Technology
IIM	Indian Institute of Management

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