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INDIA'S AI WORKFORCE REPORT

June, 2026



ABOUT THIS STUDY



- A nationwide workforce intelligence study mapping how AI is reshaping India’s enterprise workforce.
- Built on reconciled workforce dynamics across sectors, spanning AI specialists, AI engineers and AI-embedded professionals across job families and functions.
- The study reconciles data across 10+ cities, 5+ experience bands, GCCs, IT services and enterprises, using total headcount and three months of demand data.

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EXECUTIVE SUMMARY

Scale Is Real. Capability Is Scaling Rapidly	India's AI talent market represents approximately **920K professionals** across core AI and AI Embedded talent segments, positioning India among the world's largest and fastest growing AI talent ecosystems.
AI Is Expanding Beyond Specialist Roles	**~28%** of the Total AI Workforce **(920k) is the core AI workforce,** making it the second largest AI talent hub globally. India continues to rank among the world's fastest-growing markets for AI talent.
Production-Grade AI Skills Are Emerging as Strategic Differentiators	Demand momentum is emerging across **GenAI, AI deployment engineering, MLOps, governance, NLP,** and model security, reflecting the market's shift from experimentation toward enterprise scale AI implementation.
Mid-Career Talent Is Powering Enterprise AI Transformation	The 3–5-year experience band carries the steepest demand at **49.1%.** This is the cohort enterprises lean on for delivery, ownership and scale.
Tier-1 Still Owns the Map	Tier-1 cities account for nearly 85–88% of India's overall AI workforce supply. Within the more specialised core AI talent segment, Tier-1 hubs contribute an even higher concentration of approximately **93–95% of the workforce**.
India Is Building Early Depth in Specialised FDE Capability	FDE talent pool is still evolving, with India estimated to have **1.3K–1.5K specialised FDE professionals**, reflecting the early stage nature of advanced enterprise AI deployment capability in the market.

[1] 350k refers to active AI-skill-cited job postings in the last 90 days. Structural gap of ~900K represents the estimated shortfall between total AI workforce demand and current supply across India.

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FROM THE LEADERSHIP DESK



India's AI workforce market is entering a new phase. The headline says scale. The story underneath says capability.

India’s AI workforce has reached an inflection point. With an estimated 920K AI professionals (core at 257K and embedded workforce at 663K) and ~350K active AI-skill-cited job postings in the last 90 days, the market has clearly achieved scale. The bigger story, however, is the shift in demand. AI hiring is no longer concentrated in data science or machine learning alone. It is expanding across software engineering, cloud, cybersecurity, product management, operations, marketing, finance, risk and customer experience.

Our analysis points to three distinct engines of AI growth. GCCs are building reusable AI platforms and governance capabilities, IT services firms are industrialising AI deployment at scale, and enterprises are embedding AI directly into business workflows and decision-making. Together, they are creating a talent landscape where execution capability matters more than experimentation.

The fastest-growing roles today include Agentic AI Developers, GenAI Architects, AI Platform Engineers, AI Product Owners and AI deployment specialists. Yet the market continues to face significant capability shortages, with talent gaps of 82.9% in GenAI, 72.4% in AI deployment engineering, 70% in AI governance and 68% in MLOps. These are not research gaps. They are production gaps that determine whether AI pilots translate into enterprise-wide business outcomes.

Perhaps the most important finding is that AI has become a horizontal enterprise capability. More than 70% of India’s AI workforce now sits outside traditional AI specialist roles, while nearly one-third of AI demand is emerging from business functions such as operations, customer service, marketing, finance, governance and workforce management. Customer operations could see 45–60% of workflows augmented by AI, while marketing is undergoing one of the fastest AI-led workflow transformations.

India is building one of the world’s largest AI talent ecosystems. The next phase will be defined by how effectively organisations develop production-ready skills, deploy AI responsibly and convert workforce capability into measurable business value.

[1] Demand figure (350k) represents active AI-skill-cited job postings in the last 90 days; structural gap refers to the estimated 900,000-role shortfall across India’s AI workforce.

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SECTION

01

INDIA'S THREE AI DEMAND ENGINES: GCCS, ENTERPRISES, IT SERVICES & CONSULTING



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ABOUT THIS STUDY — HOW THE 920K BREAKS DOWN

	01 Agentic AI Experts	02 AI Engineering Practitioner	03 AI Applied Professional	04 AI Power User (Embedded)	05 AI-Augmented Function User (Adopter)
Tools & Capability	Foundation models, novel architectures, agentic systems, applied research. PyTorch internals, custom kernels, distributed training, published research.	Production ML, GenAI engineering, MLOps and LLMOps. PyTorch/TF in production, LangChain, LlamaIndex, vector DBs, MLflow, Kubeflow, cloud ML stacks.	Data science, advanced analytics, applied ML, ML interpretation. scikit-learn, pandas, SQL, Python/R, BI tools with AI features.	Professionals in adjacent technology roles who understand AI capabilities and AI-embedded workflows, and act as champions of AI adoption and implementation across enterprise technology and business environments.	Professionals who demonstrate active AI workflow adoption and practical AI driven execution within their functional responsibilities, rather than basic usage of common AI tools.
%	3%	7%	18%	32%	40%
Headcount	~28K	~64K	~165K	~295K	~368K

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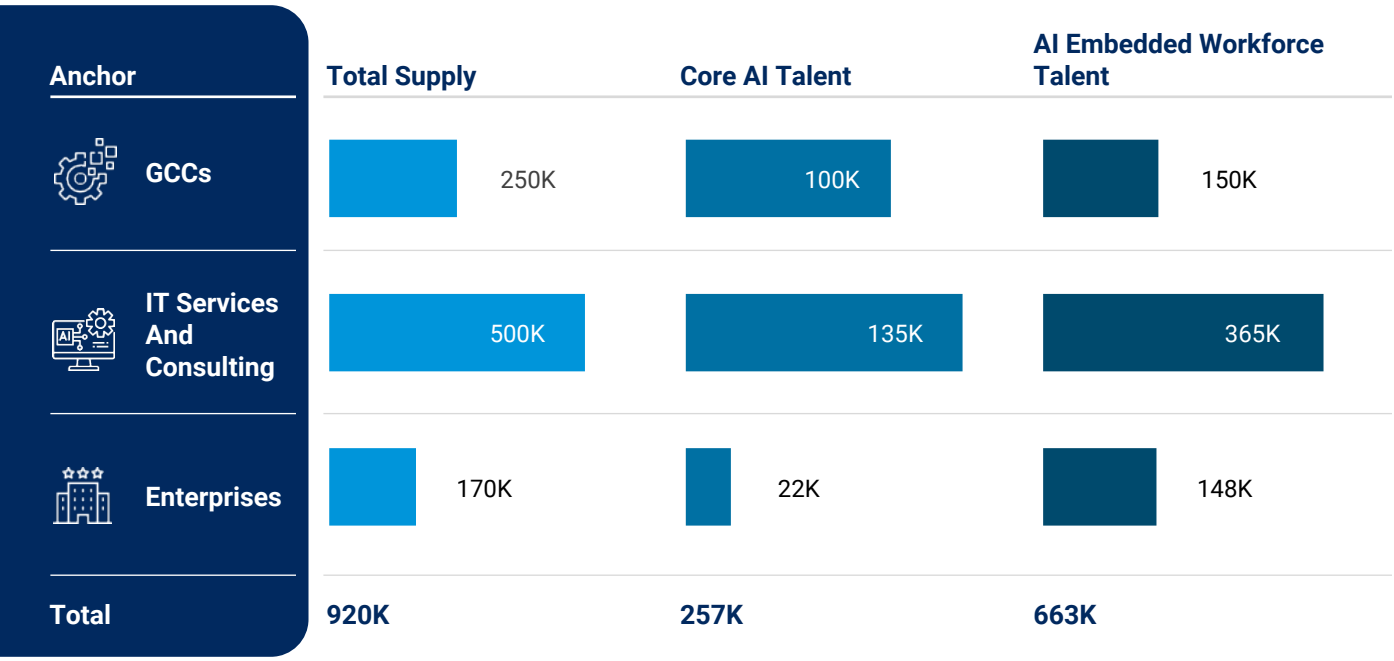
GCCs lead with a 40% Core AI share within their overall AI ecosystem, while IT services account for 27% Core AI and enterprises for 14% Core AI within their respective AI ecosystems

920K
INDIA AI TALENT SUPPLY (CORE + AI Embedded)

250K
GCC AI/ML POOL
~27% OF NATIONAL SUPPLY

500K
IT SERVICES AI SUPPLY
~54% OF NATIONAL

170K
ENTERPRISES AI SUPPLY
~19% OF NATIONAL



Core AI Talent

Engineers and architects who design, build, integrate and operate client AI solutions across GenAI applications, cloud platforms, data stacks, MLOps and security controls.

AI Embedded Workforce

Adjacent technology roles with moderate AI capabilities, including delivery, consulting, functional and industry teams who use AI to shape use cases, accelerate delivery, improve productivity and support transformation.

Demand data is analyzed from 350k Job postings from last 90 data

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GCC AI WORKFORCE SPLIT BY INDUSTRY, CAPABILITY, & DEMAND TRENDS

GCCs | 250K Supply **Column Base: Core AI Talent = 100K | AI Embedded Workforce = 150K**

Sector	Core AI Talent	AI Embedded Workforce	Core AI Roles	How Demand Is Changing	What Is Available In The Market
BFSI	18–20%	38–40%	Fraud ML Engineer, Risk AI Engineer, Model Validation Engineer	42–48% of hiring is tied to fraud scoring, AML automation, explainability, and governed ML systems.	65–70% has analytics depth, but only 25–30% supports regulated ML deployment and governance.
Technology And Product	48–52%	18–20%	GenAI Engineer, MLOps Engineer, AI Platform Engineer, LLMOps Engineer	50–55% of demand is linked to copilots, deployment engineering, AI infrastructure, and developer platforms.	55–60% has software or cloud depth, while only 20–25% supports enterprise scale AI deployment.
Retail And CPG	5–6%	10–12%	Pricing AI Engineer, Recommendation Systems Engineer, Supply Chain AI Engineer	28–34% of hiring is moving toward forecasting, recommendation systems, pricing intelligence, and supply chain optimisation.	70–80% is analytics or BI led, but only 18–22% can operationalise commercial AI systems.
Healthcare And Pharma	5–6%	14–16%	Clinical NLP Engineer, Healthcare AI Engineer, Medical Data Engineer	30–36% of demand growth is focused on clinical NLP, pharmacovigilance automation, and medical intelligence.	50–55% has healthcare analytics exposure, but only 15–20% supports clinical AI and regulatory automation.
Telecom And Networks	7–8%	10–12%	Network AI Engineer, OSS/BSS AI Engineer, Telecom ML Engineer	32–38% of telecom hiring is linked to network intelligence, predictive maintenance, and traffic optimisation.	40–45% has telecom analytics capability, while only 12–18% supports real-time AI network operations.
Manufacturing And Industrial	4–5%	3–4%	Computer Vision Engineer, Industrial AI Engineer, Predictive Maintenance AI Engineer	26–32% of industrial hiring is centred on computer vision, IoT analytics, and digital twin operations.	45–50% has engineering analytics exposure, but only 15–20% supports production scale industrial AI deployment.
Automotive And Mobility	2–3%	2–3%	Autonomous Systems Engineer, Edge AI Engineer, Mobility AI Engineer	18–24% of mobility demand is focused on ADAS analytics, telematics intelligence, and edge deployment systems.	35–40% has embedded analytics exposure, while autonomous systems capability remains niche.

Residual: 4–5% includes emerging segments such as energy, media, logistics, aviation, education, legal and public-sector GCCs.

Core AI Talent

Engineers and architects who design, build, integrate and operate client AI solutions across GenAI applications, cloud platforms, data stacks, MLOps and security controls

AI Embedded Workforce

Professionals who demonstrate active AI workflow adoption and practical AI driven execution within their functional responsibilities, rather than basic usage of common AI tools.

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GCCS: FROM CAPTIVE DELIVERY CENTRES TO AI CAPABILITY ENGINES

Core AI Talent = 100K | AI Embedded Workforce = 150K

Sector	Core AI Talent	AI Embedded Workforce	Core AI Roles	How Demand Is Changing	What Is Available In The Market
Application Development and Experience Engineering	25%	13%	Generative AI Engineer, LLM Engineer, RAG Developer, Conversational AI Engineer	Secure copilots, enterprise search, and workflow assistants contribute 38–42% of GCC application AI demand.	App engineering supply remains deep at 70–75%, though only 18–22% demonstrates enterprise GenAI maturity.
Data Platforms and Cloud Infrastructure	24%	15%	ML Platform Engineer, MLOps Engineer, Cloud ML Engineer, Data Engineer	Lakehouse, MLflow, Databricks, and cloud deployment stacks account for 34–39% of platform hiring demand.	62–68% has data or cloud capability, while just 28–33% supports governed production pipelines.
Enterprise Architecture and Systems Integration	10%	8%	AI Solution Architect, ML Solution Architect, GenAI Architect, Applied AI Architect	ERP, CRM, APIs, and workflow integration environments are driving 22–27% of enterprise AI hiring.	Integration exposure exists across 45–50% of the market, but only 16–20% can design AI linked workflows.
Data Science, BI and Decision Intelligence	17%	14%	Data Scientist, Decision Scientist, NLP Engineer, Computer Vision Engineer	Forecasting, recommendation systems, and decision intelligence now influence 28–33% of analytics demand.	Analytics readiness stands at 66–72%, though only 26–31% converts models into business decision support.
Cybersecurity, Risk and Governance	14%	10%	AI Governance Specialist, Model Risk Analyst, AI Security Engineer, Responsible AI Specialist	Explainability, validation, privacy, and AI audit controls contribute 18–22% of regulated AI hiring.	Cyber or risk exposure is visible in 38–44% of supply, while governance depth remains limited to 19–24%.
Finance, HR, Procurement and Corporate Functions	0%	14%	Not applicable	Workforce analytics, planning automation, and spend intelligence contribute 14–18% of functional AI demand.	Functional analytics capability reaches 60–66%, but only 20–25% translates tools into measurable productivity gains.
Sales, Marketing and Customer Experience	0%	7%	Not applicable	Segmentation, service automation, and personalisation workflows now contribute 12–16% of customer AI hiring.	CRM or CX exposure exists in 52–58% of supply, though only 17–21% supports scaled data activation.
Operations, Supply Chain and Quality	0%	11%	Not applicable	Procurement intelligence, forecasting engines, and workflow optimisation drive 16–20% of operational AI demand.	Operations analytics exposure reaches 44–49%, while scalable workflow adoption capability stays at 15–19%.

Residual: 8-10% Covers small specialist pools such as evaluation, testing, annotation quality alongside PMO, documentation and service support.

Core AI Talent

Engineers and architects who design, build, integrate and operate client AI solutions across GenAI applications, cloud platforms, data stacks, MLOps and security controls

AI Embedded Workforce

Professionals who demonstrate active AI workflow adoption and practical AI driven execution within their functional responsibilities, rather than basic usage of common AI tools.

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IT SERVICES AND CONSULTING: INDIA'S INDUSTRIALISATION LAYER FOR AI

Core AI Talent = 135K | AI Embedded Workforce = 365K

Sector	Core AI Talent	AI Embedded Workforce	Core AI Roles	How Demand Is Changing	What Is Available In The Market
Application Development and Experience Engineering	34%	20%	GenAI Developer, LLM Application Engineer, RAG Engineer, Conversational AI Developer	Copilots, document intelligence, and enterprise search platforms now contribute 42–46% of AI delivery demand.	72–78% has application delivery depth, but only 20–25% can deliver secure GenAI at client scale.
Data Platforms and Cloud Infrastructure	27%	18%	Cloud ML Engineer, Data Engineer, MLOps Engineer, Databricks Engineer	Around 36–41% of transformation programmes are prioritising lakehouse migration, deployment architecture, and cloud data foundations.	65–70% has cloud or data skills, but only 30–35% connects platform work to model deployment.
Enterprise Architecture and Systems Integration	14%	11%	GenAI Solution Architect, ML Solution Architect, Integration Architect, Applied AI Architect	APIs, ERP, CRM, and workflow orchestration integration account for nearly 24–28% of enterprise AI programmes.	50–55% has systems integration depth, but only 22–27% can architect across complex client estates.
Data Science, BI and Decision Intelligence	10%	8%	Data Science Consultant, Applied Scientist, NLP Specialist, Computer Vision Specialist	Fraud analytics, pricing intelligence, forecasting, and customer analytics contribute 26–31% of sector led AI hiring.	60–66% is analytics ready, but only 25–30% combines data science with sector delivery.
Cybersecurity, Risk and Governance	8%	6%	Responsible AI Consultant, Model Risk Consultant, AI Security Consultant, Model Validation Analyst	Responsible AI, model risk, security testing, and AI monitoring now form 15–19% of governance focused hiring demand.	35–41% has cyber or risk exposure, but only 15–20% has applied AI controls.
Finance, HR, Procurement and Corporate Functions	0%	8%	Not applicable	Finance analytics, workforce adoption, and procurement intelligence represent nearly 10–14% of consulting led AI transformation demand.	58–64% has functional consulting depth, but only 18–23% links adoption to benefit delivery.
Sales, Marketing and Customer Experience	0%	10%	Not applicable	Use case shaping, value sizing, and AI solution packaging capabilities now influence 14–18% of commercial AI demand.	55–61% has pre-sales or CX depth, but only 19–24% shows credible commercial influence.
Operations, Supply Chain and Quality	0%	12%	Not applicable	Fulfilment intelligence, routing optimisation, and quality analytics contribute 18–22% of service delivery AI hiring.	48–54% has operations or QA exposure, but only 16–21% can apply AI to optimisation.

Residual: 8-10% Covers project coordination, documentation, training, support, annotation and managed service enablement roles. These roles sit around delivery execution and adoption support, but do not carry enough distinct skill depth to stand as separate role families.

Core AI Talent

Engineers and architects who design, build, integrate and operate client AI solutions across GenAI applications, cloud platforms, data stacks, MLOps and security controls.

AI Embedded Workforce

Professionals who demonstrate active AI workflow adoption and practical AI driven execution within their functional responsibilities, rather than basic usage of common AI tools.

[1] Analysis covers 350K job postings across GCCs, IT services and enterprises.

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ENTERPRISES: AI IS MOVING INTO LIVE BUSINESS DECISIONS

Core AI Talent = 22K | AI Embedded Workforce= 148K

Sector	Core AI Talent	AI Embedded Workforce	Core AI Roles	How Demand Is Changing	What Is Available In The Market
Application Development and Experience Engineering	12%	6%	GenAI Engineer, LLM Application Developer, Automation Engineer, Chatbot Engineer	Internal copilots, service assistants, and document workflows now account for 24–28% of enterprise AI application hiring.	55–61% has application exposure, but only 15–20% can build without partner dependency.
Data Platforms and Cloud Infrastructure	20%	7%	Machine Learning Engineer, Data Engineer, Cloud Data Engineer, ML Platform Engineer	Data pipelines, cloud platforms, and enterprise AI integration layers contribute nearly 30–35% of infrastructure demand.	60–66% has data or cloud exposure, but only 22–27% can support enterprise integration.
Enterprise Architecture and Systems Integration	7%	5%	AI Solution Architect, ML Solution Architect, GenAI Architect, Systems Integration Architect	ERP, CRM, APIs, and workflow integration environments are driving 18–22% of enterprise AI architecture hiring.	42–48% has systems exposure, but only 12–17% can convert use cases into workflows.
Data Science, BI and Decision Intelligence	41%	15%	Data Scientist, Decision Science Analyst, Forecasting Data Scientist, Computer Vision Engineer	Pricing, credit, churn, forecasting, and service intelligence use cases now represent 40–45% of enterprise analytics demand.	65–71% is analytics ready, but only 24–28% can support accountable business decisions.
Cybersecurity, Risk and Governance	9%	5%	Model Risk Manager, AI Governance Analyst, Cyber Risk Analyst, Privacy Analyst	Privacy, controls, model risk, and governance operations contribute around 14–18% of regulated enterprise AI hiring.	33–39% has risk or security exposure, but only 12–18% is ready for AI governance.
Finance, HR, Procurement and Corporate Functions	0%	20%	Not applicable	Planning automation, headcount analytics, spend intelligence, and reporting productivity now drive 22–26% of functional AI demand.	65–70% is reporting ready, but only 20–25% can embed AI into planning routines.
Sales, Marketing and Customer Experience	0%	20%	Not applicable	Pricing intelligence, retention analytics, campaign ROI, and customer intelligence contribute nearly 20–24% of commercial AI hiring.	55–60% has CRM or campaign exposure, but only 24–28% is customer action ready.
Operations, Supply Chain and Quality	0%	18%	Not applicable	Routing, inventory, fulfilment, quality, and utilisation optimisation now influence 18–23% of operational AI demand.	46–52% has operations analytics exposure, but only 18–23% can manage demand, cost, and service trade-offs.

Residual: Core AI residual is 11%, covering niche automation, evaluation, NLP support and model testing roles. AI Embedded residual is 4%, covering legal, admin, field operations, documentation & small functional user groups.

Core AI Talent

Engineers and architects who design, build, integrate and operate client AI solutions across GenAI applications, cloud platforms, data stacks, MLOps and security controls

AI Embedded Workforce

Professionals who demonstrate active AI workflow adoption and practical AI driven execution within their functional responsibilities, rather than basic usage of common AI tools.

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THE SHIFT IS FROM AI EXPERIMENTATION TO AI EXECUTION

Foundational ML and Decision Intelligence are reasonably staffed. GenAI, AI Model Operations, AI Deployment Engineering, NLP, AI Governance and AI Security all show critical shortages.

Which Themes are Driving The Critical Shortages

GenAI & Prompt Engineering — Gap 82.9%

IT Services, BFSI, Retail sectors
About 45% of GenAI demand sits in IT Services. BFSI and Retail follow as adoption shifts from experimentation to productisation.

Deployment Engineering — Gap 72.4%

BFSI, IT services, GCCs and Enterprise Tech sectors
Roughly 60% of AI deployment demand concentrates in regulated and platform-led sectors. Production rigour is non-negotiable.

AI Governance & Responsible AI — Gap 70.0%

BFSI, Pharma, Healthcare sectors
Demand is growing 3x faster in regulated sectors than overall AI hiring. DPDP enforcement is accelerating the curve.

AI Model Operations (MLOps) — Gap 68.0%

BFSI, IT services, GCCs and Enterprise Tech sectors
Around 55% of MLOps demand is GCC-led. Platform engineering depth is the new GCC differentiator.

Production AI capability remains concentrated in smaller specialist talent pools, with the highest gaps visible in GenAI deployment (83%), AI deployment engineering (72%), AI governance (70%), MLOps (68%), AI security (67%), and NLP (63%).

Foundational AI and analytics hiring remains comparatively stable, with lower gaps in foundational ML (29%) and decision intelligence (17%). Demand is steadily shifting toward operational AI systems that support scale, governance, reliability, and measurable business deployment.

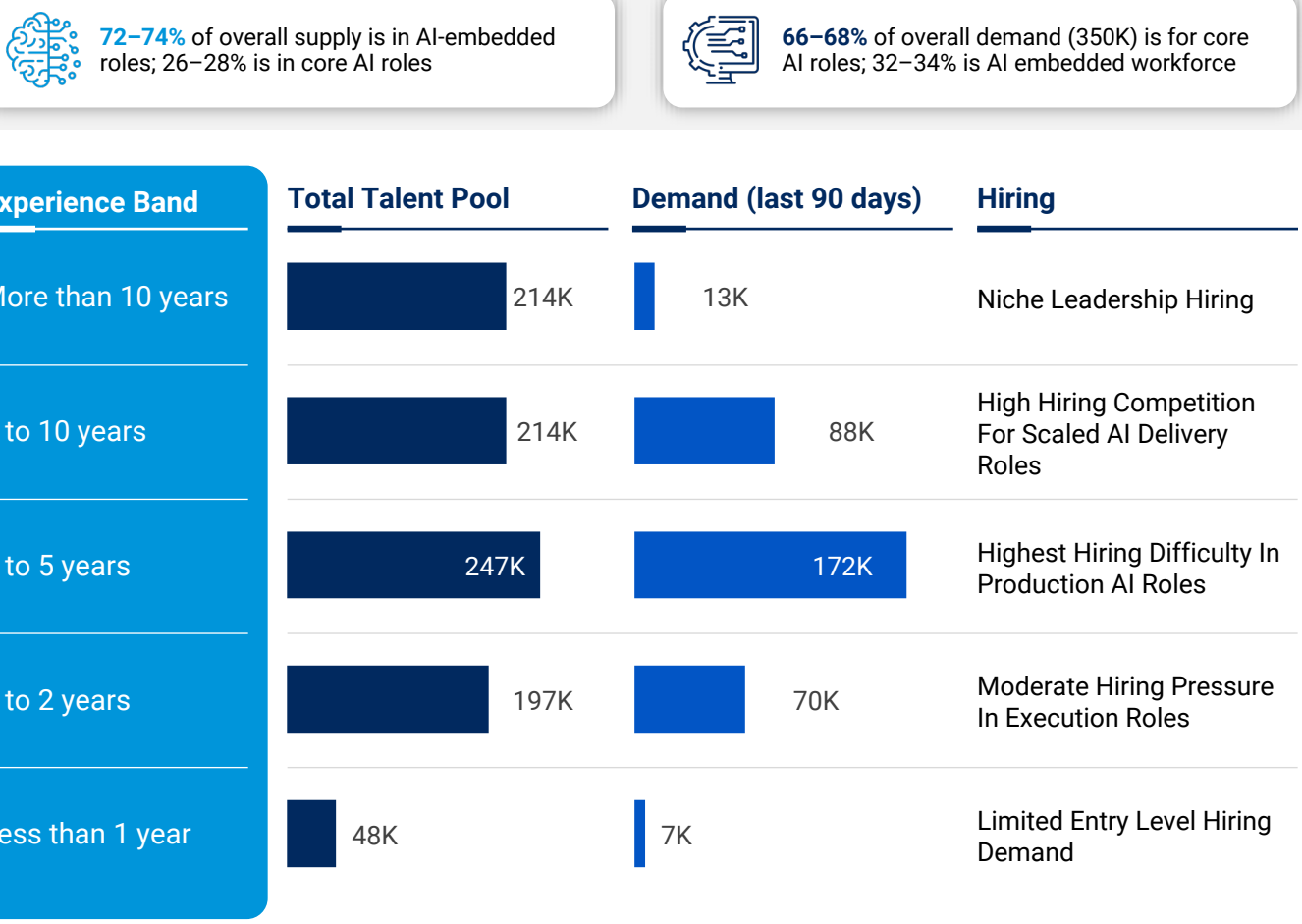
Where The Scarcity Lives

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THE NEXT OPPORTUNITY LIES IN STRENGTHENING MID CAREER AI CAPABILITY

72–74% of overall supply is in AI-embedded roles; 26–28% is in core AI roles

66–68% of overall demand (350K) is for core AI roles; 32–34% is AI embedded workforce



Two Binding Constraints On Enterprise AI Adoption

49.1%— Highest Hiring Pressure Sits In The 3–5 Year AI Talent Band

72K active AI demand versus 247K available talent,but only a smaller production ready segment holdsdeployment scale capabilities across LangChain,RAG, MLOps, and LLMOps environments.

5% — Senior AI Leadership Talent Remains a Specialised Pool (10+ Year Band)

Only a limited share of senior technology leaders currently carry long term production AI deployment experience across enterprise scale platforms, governance, and AI transformation programmes

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THE SAME AI ROLE SIGNALS DIFFERENT HIRING INTENT ACROSS GCCS, IT SERVICES AND ENTERPRISES

High Growth Role	GCCs	IT Services	Enterprises
Agentic AI Engineer	Build agent workflows on internal platforms with governance, monitoring and enterprise data access.	Deliver agentic systems for clients using LangGraph, LangChain, RAG, APIs and cloud deployment.	Use agents inside sales, service, claims, risk, finance and operations workflows.
AI Technical Architect / GenAI Architect	Set blueprint and standards for enterprise AI agent development, integration and reuse.	Architect client solutions using LLM APIs, RAG, cloud, ERP, CRM and workflow integration.	Translate priority use cases into systems architecture that works with existing enterprise apps.
AI Software Engineer, Agentic AI And MCP Systems	Build internal agent frameworks, MCP connectors and reusable orchestration components.	Engineer client-ready agent systems using CrewAI, LangGraph, LangChain, TypeScript and Python.	Build focused tools where agentic workflows need to connect with customer or employee systems.
GenAI / Agentic AI Developer	Develop internal copilots, document workflows and knowledge assistants with guardrails.	Build GenAI applications across client accounts using RAG, LLM orchestration and backend APIs.	Extend existing applications with GenAI features rather than building standalone AI platforms.
Responsible AI Tech Lead	Embed privacy, explainability, audit trails and validation into internal AI build cycles.	Add responsible AI checks, governance controls and delivery standards into client programmes.	Partner with legal, risk and business teams where AI decisions need accountability.
AI Product Manager / Product Owner	Convert internal AI use cases into reusable products, backlogs and adoption roadmaps.	Package use cases into client propositions, delivery plans and scalable solution assets.	Own adoption, value tracking and workflow change inside business units.

GCCs

45–50% of JDs focus on reusable internal AI platforms, governance, and enterprise integration.

IT Services

55–60% AI JDs are written around client deployment, orchestration, and scaled delivery programmes.

Enterprises

60–65% of JDs emphasise workflow integration across operations, finance, risk and employee systems.

The same AI role no longer signals a uniform hiring need. GCCs are hiring these roles to build reusable internal capability, IT services firms are hiring them to industrialise client delivery, and enterprises are hiring them selectively to embed AI into business workflows. This shows that AI talent demand is now shaped more by operating model than by role title alone.

The above data is analysed from the 350k total active job postings analysed (last 90 days); Insights are captured from job postings that represent role-level archetypes across GCCs, IT services and enterprises.

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SECTION

02

AI JOB FAMILY ANALYSIS



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AI CAPABILITY IS MOVING ACROSS ENTERPRISE JOB FAMILIES, NOT STAYING CONFINED TO SPECIALIST ROLES

66–68% Of Overall Demand (350K) Is For Core AI Roles

Job Family	Supply (K) Overall	Demand (K) 90 Days Rolling	Pressure
Machine Learning Engineering	85	56	Critical
Data & Analytics	185	78	High
Platform & Data Engineering	50	23	Critical
DevOps & Site Reliability Engineering	25	16	Critical
Cybersecurity	20	10	Critical
Cloud & Infrastructure	15	9	Critical
Enterprise Applications	30	12	Critical
Product Engineering	25	11	High
Product Management	20	7	High
UX / UI & Design	10	3	High
Research & Applied Science	35	5	Balanced

Pressure reflects overall hiring intensity, deployable talent availability, and production readiness across each AI capability cluster.

Note

Supply (K) refers to:

1. Engineers and architects who design, build, integrate and operate client AI solutions across GenAI applications, cloud platforms, data stacks, MLOps and security controls.
2. Professionals in Adjacent technology roles who understand AI capabilities AI Embedded workflows, and act as champions of AI adoption and implementation across enterprise technology and business environments

Demand (K) refers to active job postings from the last 90 days in which AI skills are explicitly cited in the JD.

[1] 350k total active job postings analysed (last 90 days); demand figures represent AI-skill-cited postings per job family within this universe.

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NON-TECH BUSINESS FUNCTIONS NOW ACCOUNT FOR 120K DEMAND, LED BY OPERATIONS AND MARKETING FUNCTIONS

32–34% Of Overall Demand (350K) Is For AI Embedded Workforce

Enterprise And Business Families	Supply (K) Overall	Demand (K) 90 Days Rolling	Pressure
Operations	185	57	Surplus
Marketing	50	12	Balanced
Customer Operations & Service	45	10	Balanced
Sales & Revenue Operations	30	7	Balanced
Finance & Risk	20	4	Balanced
Governance, Risk & Compliance	25	22	Critical
People & Talent	18	8	Moderate

Pressure reflects overall hiring intensity, deployable talent availability, and production readiness across each AI capability cluster.

Note

Supply (K) reflects only specialised AI-embedded business professionals with demonstrated AI implementation, governance, orchestration, automation, or transformation capability within enterprise workflows, excluding generic AI productivity usage across the broader workforce rather than basic usage of common AI tools

For example, within People & Talent, the analysis included only professionals demonstrating specialised AI embedded capability in areas such as AI-driven workforce planning, skills intelligence and AI-based hiring orchestration, talent analytics automation, conversational AI Embedded HR operations, workforce intelligence platforms, and AI governance within HR workflows

Demand K refers to 90 days rolling job postings where AI, automation, analytics, governance or workflow intelligence skills are mentioned. Gap % and pressure remain the overall market view.

[1] 350k total active job postings analysed (last 90 days); demand figures represent AI-skill-cited postings per job family within this universe.

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AGENTIC AI WORKFORCE SPREAD ACROSS ROLE CLUSTERS

Agentic AI Role Cluster	Supply spread
Agentic AI Application Build	**85.8% show API or integration exposure, which makes it the fastest** convertible pool for agent application build.
Agentic AI Model Engineering	**28.2% of supply, but only 54.9% show integration exposure**.
Agentic AI Consulting And Delivery	**75.7% show cloud or runtime** exposure, but governance depth is visible in only 5.9%.
Agentic AI Product And Workflow Ownership	Product ownership is under **10% of supply, creating** a gap between technical build capacity and business adoption ownership.
Agentic AI Evaluation And QA	**73.2% show evaluation**, QA or testing signals, making this the main assurance pool for hallucination checks and workflow reliability.
Agentic AI Runtime And Platform Operations	Runtime supply is thin at 3.3%, while 97.6% of this pool has cloud or runtime depth, making it a high value conversion segment.
Agentic AI Architecture And Integration	Integration supply is small, **but 78.8% show API or architecture exposure, which is critical when agents move into ERP, CRM and workflow systems.**

24–26%
Of Emerging Agentic AI Supply Sits In GenAI Developer Roles

8–10%
Of Supply Sits In Responsible AI & Governance Roles

22–24%
Of Agentic AI Talent Is Concentrated In Workflow & Orchestration Engineering

[1] 350k total active job postings analysed (last 90 days); demand figures represent AI-skill-cited postings per job family within this universe.

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AGENTIC AI WORKFORCE DEMAND COMPOSITION

Agentic AI Role Family	Share Of 8.5K Postings	Top Skills Cited In JDs
Agentic Application Development	22%	Python, GenAI, LLM APIs, backend engineering, API integration
Multi-Agent Orchestration and Tool Calling	18%	LangGraph, CrewAI, AutoGen, function calling, workflow routing
RAG, Vector DB And Context Engineering	15%	Embeddings, semantic search, vector stores, retrieval pipelines, knowledge grounding
Architecture, Systems Integration And MCP	12%	MCP, enterprise APIs, microservices, ERP connectors, CRM workflows
AgentOps, Runtime And Observability	10%	Kubernetes, Docker, monitoring, tracing, deployment pipelines
Safety, Governance And Trust	9%	Guardrails, responsible use, privacy checks, validation, audit trails
Evaluation, Prompt Ops And QA	7%	Test design, hallucination checks, prompt regression, benchmark suites, AI QA
Product, Workflow And Adoption	5%	Use case ownership, roadmap planning, adoption metrics, ROI tracking, workflow design
CX, Voice And Conversational Agents	2%	Voice bots, multilingual support, conversational flows, service automation, IVR redesign

Build & Orchestration Driving **40%** Of Hiring

Runtime & Integration Form **37%** Of Demand

Governance Hiring Is **8x** Larger Than CX Agents

The above data are analysed from agentic AI job postings over the last 90 days.

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SECTION

03 IMPACT OF AI



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AI DEMAND IS EXPANDING ACROSS COMMERCIAL, MARKETING, SERVICE, AND OPERATIONAL FUNCTIONS

Non Tech Business Function	Roles Most Impacted By AI	Estimated Workflow Impact	AI Workflow Shift Visible in JDs
Customer Operations And Service	Customer Support Executives, Service Desk Agents	45–60% of repetitive workflows	Voice AI, ticket routing, conversational workflows, virtual agent support
Marketing, Growth And Content	Content Writers, SEO Specialists, Campaign Executives, Digital Marketing Analysts	40–50% of campaign and content workflows	AI SEO, GEO, AEO, LLMO, campaign automation, AI content workflows
Sales And Revenue Operations	Pre Sales Analysts, Proposal Teams, Sales Operations Specialists	25–35% of proposal and coordination workflows	RFP automation, AI assisted demos, sales workflow automation
Business Operations And Coordination	Operations Coordinators, Reporting Analysts, Workflow Executives	35–45% of operational coordination tasks	Workflow orchestration, CRM automation, AI operations
Finance And Compliance Operations	Reporting Analysts, Compliance Coordinators, Risk Operations Teams	15–25% of reporting and compliance workflows	AI governance, controls automation, audit intelligence
Product And Programme Operations	PMO Analysts, Product Operations Specialists	20–30% of programme and reporting workflows	AI adoption metrics, workflow redesign, AI programme governance

60%
Highest AI Workflow Impact Is Visible In Customer Operations

50%
Marketing Functions Show The Fastest AI Led Workflow Transformation

45%
Operations And Coordination Roles Are Seeing Large Scale Workflow Automation

30%
Sales and Product Functions Are Moving Toward AI-Assisted Execution

Methodology:

Estimated workflow impact percentages are directional modelling estimates derived from mapping repetitive, coordination, reporting, service, and execution-oriented activities within each function against enterprise AI adoption patterns and automation use cases.

- Estimates are triangulated using enterprise AI job descriptions, recurring AI skill references in non tech hiring, workflow transformation themes, and broader supply side role distribution across impacted business functions.
- AI workflow impact does not represent workforce replacement. It reflects the proportion of activities where AI assisted execution, workflow automation, copilots, orchestration, or decision support systems are increasingly being embedded.

[1] 350k total active job postings analysed (last 90 days); demand figures represent AI-skill-cited postings per job family within this universe.

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AI IMPACT IS RISING IN WORKFORCE INTELLIGENCE CAPABILITIES



In corporate and advisory functions, AI demand is moving into judgement-heavy work. These JDs are not asking for model builders; they are asking for functional specialists who can use AI to improve decision quality, control discipline and workforce capability.

Non Tech Business Function	Roles Most Impacted By AI	Estimated Workflow Impact	AI Workflow Shift Visible in JD's
People, Talent And Learning	Talent Acquisition Coordinators, Recruitment Sourcing Specialists, Learning Operations Executives	20–30% of HR and workforce workflows	Talent analytics, AI hiring orchestration, conversational HR workflows, workforce intelligence
Finance, Credit And Business Risk	Credit Risk Analysts, Financial Control Analysts, Compliance Reporting Specialists, Risk Operations Associates, financial modelling experts	15–25% of reporting and governance workflows	AI governance, risk analytics, audit intelligence, controls automation
Consulting And Transformation	Operating Model Consultants, Business Transformation Analysts, Process Excellence Specialists, Change Transformation Leads	25–35% of transformation and process workflows	Workflow redesign, AI adoption strategy, transformation, enterprise automation
Business Intelligence And Analytics	MIS Analysts, Dashboard Reporting Specialists, Data Visualisation Analysts, Business Reporting Executives	30–40% of reporting and analytics workflows	AI assisted analytics, dashboard automation, automated insight generation etc

35–45% Business Operations Roles Are Rapidly Moving Toward Workflow Automation

15–35% HR, Finance And Transformation Roles Are Seeing AI Assisted Decision Support Adoption

Methodology:

Estimated workflow impact percentages are directional modelling estimates derived from mapping repetitive, coordination, reporting, service, and execution-oriented activities within each function against enterprise AI adoption patterns and automation use cases.

- Estimates are triangulated using enterprise AI job descriptions, recurring AI skill references in non tech hiring, workflow transformation themes, and broader supply side role distribution across impacted business functions.
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SECTION

04

WHERE THE TALENT SITS



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CITY CHOICE IS NOW A STRATEGY CALL — NOT A GEOGRAPHY CALL

Each city reflects a different AI sourcing strategy.

Four City Archetypes. Four Different AI Bets.



AI Scale Hubs — Bengaluru

Headcount mandate at any scale. Best for centralised CoEs and platform engineering pools where talent gravity matters.



Enterprise AI Hubs — NCR · Hyderabad · Mumbai

Large-enterprise AI corridors. Mature supply ecosystems make these the best home for sector-specific AI CoEs — BFSI in Mumbai, healthcare in Hyderabad.



Specialist AI Hubs — Pune · Chennai · Kochi

Sector-tilted depth at 20–30% lower premium than scale hubs. Pune for BFSI and Manufacturing AI. Chennai for engineering and auto AI. Kochi for analytics and GCC overflow. Ideal for hub-and-spoke models.



Emerging AI Nodes — Coimbatore · Indore · Bhubaneswar · Jaipur

Around 12–15% of supply and are compounding quickly. 40–50% of Bengaluru cost for comparable junior-mid AI talent. The 24–36-month bet that compounds — early movers will lock in cost arbitrage before parity arrives by 2028.

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TIER-1 CITIES PROVIDE STRONGER MARKET DEPTH, BUT TALENT COMPETITION REMAINS HIGH

Bengaluru contributes nearly 27% of India's overall AI workforce. In specialised core AI talent, its share rises to nearly 36–38%, making it India's Silicon Valley for advanced AI engineering, GCCs and enterprise AI capability.

City	Supply	Demand 90 Days	Pressure
 Bengaluru	260K	105K	Very High
 Hyderabad	140K	54K	High
 Delhi NCR	125K	50K	Very High
 Pune	90K	36K	High
 Chennai	80K	26K	Elevated
 Mumbai	95K	39K	High

Supply refers to the overall AI and AI Embedded talent pool. Demand refers to AI skill cited active job postings in the last 90 days.

[1] 350k total active job postings analysed (last 90 days); demand figures represent AI-skill-cited postings per job family within this universe.

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TIER-2 CITIES OFFER COST-EFFICIENT POOLS, BUT DEPTH IS CONCENTRATED IN SELECTED SKILLS

City	Supply	Demand 90 Days Rolling	Pressure
 Kolkata	20K	4.5K	Elevated
 Ahmedabad	20K	7.0K	High
 Coimbatore	15K	3.5K	Elevated
 Indore	10K	3.0K	Elevated
 Jaipur	9K	2.5K	Elevated
 Bhubaneswar	6K	1.5K	High
 Kochi	5K	3.5K	Very High

Other locations account for 45K supply and 12K demand in the last 90 days, covering Chandigarh, Surat, Vadodara, Nagpur, Mysuru, Mangaluru etc.
These markets support overflow and junior-to-mid-level workforce
Supply refers to the overall AI and AI Embedded talent pool. Demand refers to AI skill cited active job postings in the last 90 days.

[1] 350k total active job postings analysed (last 90 days); demand figures represent AI-skill-cited postings per job family within this universe.

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SECTION

05

FASTEST GROWING AI ROLES



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AI ROLES WITH THE SHARPEST DEMAND GROWTH

Fastest Growing AI Role	Growth %: Year-on-year growth compared with active demand	Demand Signal From Postings
Agentic AI Developer	+260%	Postings ask for Python, LangChain, RAG, cloud and backend API development.
AI Software Engineer, Agentic AI And MCP Systems	+225%	Role language includes MCP systems, CrewAI, LangGraph, TypeScript and agent frameworks.
GenAI And Agentic AI Engineer	+205%	Postings combine GenAI, Agentic AI, RAG, LLM, Python and cloud deployment.
Agentic AI Architect	+185%	Titles include Agentic AI Architect, Agentic AI Solutions Architect and GenAI RAG Architecture.
RAG And Agentic AI Lead	+165%	Roles mention RAG, backend, orchestration, MCP, CRM, access control and Python.
GenAI Solution Architect	+145%	Visible titles include AWS and GenAI Solution Architect, TC GenAI Architect and AI Technical Architect.
AI Product Owner / Product Manager	+120%	Titles include Agentic AI Product Owner and Principal Product Manager, Agentic AI.
AI Platform Engineer / AI Systems Engineer	+105%	Roles include Senior Platform Engineer Agentic AI, Specialist Software Engineer AI Systems and Principal AI Engineer.
Senior Lead Quality Engineer, GenAI	+82%	Postings include quality engineering, automation, risk assessment and GenAI product quality.
AI Automation / DevSecOps Platform Engineer	+68%	Postings include AI automation, Kubernetes, microservices, QA, IAM and shift-left security.

[1] 350k total active job postings analysed (last 90 days); demand figures represent AI-skill-cited postings per job family within this universe.

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THE NEXT AI HIRING WAVE IS MOVING FROM MODEL BUILDERS TO AI IMPLEMENTERS

India's AI talent market is beginning to create a new hybrid engineering layer focused on deployment, workflow integration, and enterprise execution rather than standalone model experimentation. **This is where Forward Deployed Engineer (FDE) roles are emerging.**

The current talent pool remains relatively small. India is estimated to have only **1.3K–1.5K narrowly defined FDE professionals**, while the broader adjacent implementation ecosystem is estimated at **12K–15K professionals**

India is already building an adjacent FDE-like talent pool of nearly **12K–15K engineers across backend engineering, cloud platforms, APIs, AI** deployment, and enterprise integration environments.

Top Hubs	Primary Market Position	Estimated FDE Supply Depth	Why The Hub Matters
Bengaluru 	Largest FDE hiring and supply hub	38–42%	Strongest concentration of AI startups, GCCs, Enterprise SaaS, GenAI platforms, and production AI engineering capability.
Hyderabad 	GCC and cloud engineering hub	16–18%	Strong AI infrastructure, cloud, MLOps, and enterprise platform engineering ecosystem led by GCC expansion.

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THE RISE OF INDIA'S AI IMPLEMENTATION ENGINEERING WORKFORCE

FDE Hiring Themes	Share Of FDE Hiring Signals	Supply Side Observation
AI-Native Development and Copilot Workflows	60–65%	Strong backend engineering supply exists, but AI native workflow adoption remains concentrated in a smaller specialised pool.
Backend Engineering, APIs And Cloud Infrastructure	55–60%	India has broad cloud and backend talent depth, though fewer engineers carry production AI deployment exposure.
Agentic Workflow Design And Automation	45–50%	Supply remains early stage, with most capability concentrated inside AI startups, GCCs, and advanced SaaS engineering teams.
MCP And Enterprise System Integrations	40–45%	Enterprise integration talent exists at scale, but AI linked workflow orchestration capability remains niche.
Customer-Facing AI Problem-Solving	35–40%	Very limited supply combines engineering depth with customer workflow consulting and implementation ownership.
AI Deployment And Runtime Operations	35–40%	Runtime and operational AI capability remains one of the thinnest specialist pools in the current market.

Nearly Half Of FDE Demand Is Concentrated Around Workflow Orchestration And Enterprise Integration

70%+ Of Emerging FDE Demand Is Centred On Production AI Execution Rather Than Model Research

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SECTION

06

SECTOR-WISE AI WORKFORCE ANALYSIS



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BFSI — AI IS RESHAPING THE VALUE CHAIN. MATURITY VARIES SHARPLY.

Value Chain Coverage	Customer Acquisition · Onboarding & KYC · Underwriting & Credit · Servicing & CX · Risk & Fraud · Compliance
High Value Today	• AI Fraud Detection — real-time pattern detection delivering 35–42% loss reduction • Credit Decisioning — alternative-data scoring with faster turnaround • Customer Service — conversational agents handling 60%+ of tier-1 queries
Emerging / Scaling	• GenAI Advisory — wealth and retail-banking advisory copilots • AI Underwriting Augmentation — document AI for SME and trade credit • AML & KYC AI Intelligence — entity resolution, behaviour analytics
Limited Value / Nascent	• Fully-Automated AI Lending — regulatory and explainability still gating • Branch-Level AI Personalisation — data integration immaturity limits depth • Predictive AI Compliance — sector frameworks still emerging

Sector Indicators

~40%
of BFSI AI demand concentrated in fraud, risk and decisioning workflows

1.4x
higher demand pressure on governance & compliance vs broader analytics

~30%
of BFSI hires now require regulated-domain + AI fluency

Workforce Capabilities Required

- Senior NLP / AI decision-intelligence specialists
- AI Governance, risk and model-explainability leads
- AI MLOps engineers with regulated-domain experience
- Domain-fluent AI product managers (lending, cards, risk)

Key Takeaway

BFSI carries the second-largest absolute AI hiring pressure in India and the steepest dependency on regulated-domain AI specialists.

The sector is competing with global GCCs for the same scarce 4K–7K pool of AI governance talent.

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MANUFACTURING — THE MOST ACHIEVABLE AI WORKFORCE BUILD

Value Chain Coverage	Design & R&D · Sourcing & Procurement · Production & QC · Maintenance & Reliability · Supply Chain · Customer & After-Sales
High Value Today	• Computer Vision QC — AI defect detection and in-line inspection delivering 18–25% defect reduction • Predictive Maintenance — sensor-driven failure prediction delivering 15–30% downtime reduction • AI Energy Optimisation — process-level energy modelling and tuning
Emerging / Scaling	• AI Digital Twin Operations — plant-level digital replicas for simulation and tuning • AI Supply Chain Intelligence — demand sensing, multi-tier visibility • AI Yield Optimisation — process-parameter tuning via reinforcement learning
Limited Value / Nascent	• Autonomous AI Plant Operations — integration immaturity, change management gates • Generative AI Product Design — engineering toolchain integration still developing • AI-led Procurement — vendor-data fragmentation limits depth

Sector Indicators

~45%
of Manufacturing AI demand concentrated in CV-QC and predictive maintenance

~3x
slower governance hiring vs BFSI — capability-light today

Workforce Capabilities Required

- Computer Vision AI engineers + edge deployment specialists
- OT/IT AI integration engineers — bridging plant systems and cloud
- Manufacturing technologists who can run AI in plant context
- Industrial AI data engineers — sensor and time-series fluent

Key Takeaway

Manufacturing has the most achievable AI workforce build of the major sectors — visible ROI from CV-QC AI and predictive maintenance, and a lower AI demand-supply gap than BFSI or Pharma. The constraint is integration depth, not headcount. The sector will benefit disproportionately from sovereign cloud, edge GPUs and Tier-2 city AI talent expansion.

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HEALTHCARE & PHARMA — SMALL TEAMS. DEEP CAPABILITY.

Value Chain Coverage	R&D & Discovery · Clinical Trials · Diagnostics · Patient Care · Pharmacovigilance · Regulatory & Compliance
High Value Today	• AI Diagnostic Imaging — radiology, pathology, ophthalmology with measurable accuracy improvement • AI Molecule Discovery — generative chemistry + protein modelling driving meaningful R&D acceleration • Clinical Trial NLP AI — site selection, protocol design and material trial-cycle compression
Emerging / Scaling	• AI Patient Triage & Routing — hospital-level triage assistants and admin automation • AI Pharmacovigilance Intelligence — adverse-event detection from real-world data • AI Regulatory Intelligence — submission drafting and comparator analysis
Limited Value / Nascent	• Autonomous AI Diagnosis — clinical accountability frameworks still maturing • Generative Drug Design at Scale — validation cycles still long; wet-lab gating • Patient-facing Conversational AI Care — trust and liability framework gaps

Sector Indicators

~50%
of demand sits in diagnostics, discovery and trial NLP

5.2%
of national demand vs 2.0% of supply

Workforce Capabilities Required

- AI applied scientists and research-trained modellers (very thin pool)
- Clinical NLP specialists with domain ontology fluency
- Regulated-domain AI MLOps and AI governance leads
- Healthcare-specific AI product managers — bridging clinical + technical

Key Takeaway

Healthcare and pharma hiring will follow a “small team, deep capability” model rather than a scale-hiring model. Sector AI success depends less on volume hiring and more on attracting AI research-grade specialists from global GCCs and academia. Regulatory clarity — DPDP and sectoral AI guidance — will be the single biggest unlock for the next 36 months.

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SECTION

07

FUTURE OF WORK



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AI WILL CREATE NEW ROLES AND RESHAPE WORK BY 2030

The defining advantage of the next decade is the workforce able to work with AI — not around it.

By 2030, India will create **2.3M+** AI Embedded roles and transform **4.5M+** existing roles.

Roles At High AI Disruption Risk By 2030

- Routine BPO and content moderation
- Entry-level coding and QA
- Routine analytics and reporting
- Junior creative production
- Mid-level admin and coordination

Roles that could be impacted by AI

Role Cluster	Signal
Customer Operations, Contact Centre and Service Support Roles	High automation exposure
Marketing Content, SEO and Campaign Operations Roles	Workflow redesign
Sales Operations, Proposal and Pre Sales Coordination Roles	Productivity augmentation
BI Reporting, MIS and Dashboard Analyst Roles	High automation exposure
Operations Coordination and Workflow Administration Roles	High workflow restructuring exposure
HR Operations, Recruitment Coordination and Workforce Support Roles	Workflow redesign
Finance Reporting, Compliance and Risk Operations Roles	Productivity augmentation
Entry-Level Engineering, QA and Support Delivery Roles	High automation exposure
Product Operations, PMO and Transformation Coordination Roles	Human judgement intensive roles

Future enterprise value will increasingly be measured through productivity uplift, workflow efficiency, automation coverage, and decision quality rather than workforce scale or headcount expansion alone.

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CONCLUSION

Statistics to Watch

Headline	What It Says	Why It Matters
920K	AI Talent Pool	Core AI + AI Embedded workforce
350K	AI Hiring Demand (last 90 Days)	~2.6 candidates per role on the surface
68%	Core AI Demand	specialist-only
49.1%	AI Mid-Career Demand	3–5 yr band carries the steepest gap
82.9%	GenAI Shortage	Critical AI scarcity at the production edge
85-88%	Tier-1 Total AI Workforce	Tier-2 still growth nodes, not scale leaders
93-95%	Tier-1 Core AI Workforce	Tier-1 outpaces Tier-2 cities with big margins
4.5M+	Roles AI-Redefined	Transformation exceeds creation by 2030



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METHODOLOGY

Building a Reliable AI Talent Supply and Demand Baseline

How the 920K supply and 350k demand baseline was built — and what it would take to break it. This section is designed to answer the questions a statistical reviewer would ask before accepting any number in this report.

1. Research Design — Framework



This study employs a rigorous, multi-layered workforce intelligence methodology to estimate India's AI talent landscape, arriving at a baseline of **920,000 AI professionals** and **350,000 active AI-skill-cited job postings**. Rather than relying on a single source, the analysis uses a mixed-method and triangulated approach, combining large-scale quantitative datasets with expert validation to ensure accuracy and reproducibility. More than **40 million data records** were analysed as part of the study.

2. Data Sources — Three Layers



1. Public Secondary Data

Industry reports, workforce statistics and publicly available datasets.

2. Labour Market Intelligence

AI-related job postings from public job boards and enterprise career portals. Professional profile signals, including skills, roles, locations and AI tool expertise. Contributor activity from developer ecosystems to validate technical depth and AI engineering capability.

3. Subject Matter Expert Validation

Findings were reviewed and validated by AI industry experts to ensure practical relevance and accuracy.

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METHODOLOGY (CONT'D)

3. Supply Estimation Approach



AI talent supply was calculated using a bottom-up model across two distinct cohorts:

Core AI Specialists: Professionals demonstrating AI/ML expertise through role history, technical skills and production-level AI experience.

AI-Embedded Professionals: Individuals in technology, consulting, functional and business roles who actively use AI to drive productivity, transformation and decision-making.

4. Demand Estimation Approach



Demand was measured using a rolling 90-day analysis of AI hiring activity, with advanced de-duplication techniques to eliminate reposts and duplicate listings. Additional modelling was applied to account for hiring through referrals, internal mobility, executive search and confidential mandates that do not appear on public job boards. Roles were classified by sector, function, location, experience level and AI use case to identify true market demand.

5. Quality Controls and Confidence Levels



Every data point was validated against multiple independent inputs. Where significant variations occurred, conservative reconciliation methods were applied. Headline estimates carry a confidence band of **±10–15%**, ensuring transparency around modelling assumptions and market variability.

6. Governance and Refresh Cycle



The demand baseline is refreshed quarterly, while sector and city-level insights are updated monthly. The methodology prioritises transparency, consistency and reproducibility, making it a reliable workforce intelligence framework for strategic talent planning and AI market analysis.

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