

Issue brief India's AI playbook: From talent incubator to AI leader

By Trisha Ray

Bottom lines up front:

- India has adopted a proactive, use-case-driven AI strategy focusing on sectors like education, healthcare, energy, agriculture, and financial services, aiming to democratize access to AI and integrate informal workers into the Fourth Industrial Revolution.
- India's AI talent ecosystem is rapidly growing, supported by government skilling programs, university integration, and industry partnerships, but faces structural gaps.
- While the country is a top STEM talent exporter, facing high brain drain to developed Western economies, recent policy measures aim to retain and attract talent.

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Introduction

The successful adoption of artificial intelligence (AI) has become an axis of national power, crucial not just for the commercial success of companies but for economic progress, national resilience, and the livelihoods of citizens. Talent in the form of technical skills for building and deploying AI models, as well as for incorporating AI in processes in a way that makes them more accessible and useful, is a keystone of national competitiveness in AI.

India offers an instructive model. Home to the world's largest English-speaking STEM (science, technology, engineering, and math) talent pool and a deliberate government-led AI strategy, India has moved from being a passive adopter of AI to an active participant in the technology, proactively investing in homegrown large language models (LLMs) and use cases for its citizens.

The dual challenges of AI talent development and workforce transition are urgent for India, which overtook China to become the world's most populous country in 2023.¹ India's information technology (IT) sector experienced its first boom in the 1990s through the early 2000s, bolstered by economic liberalization policies, demand for labor resulting from the Y2K bug, and, later, immigration reforms in the United States that capped the number of H1B workers. The sector has since become aspirational for Indians seeking upward economic mobility. AI presents opportunities for growth in this area but also threatens to upend the established model of service-sector growth if either the workforce is not sufficiently equipped with skills to use AI effectively or industry is not poised to absorb this new AI workforce.²

This report, based on an event hosted by the Atlantic Council on January 23, 2026,

assesses India against a framework of a robust AI talent ecosystem and distills evidence-based lessons from India's approach that other emerging economies can adapt, with attention to both India's successes and the structural gaps it has yet to close.³

Note on scoring methodology

The approach used is based on a framework developed by the Atlantic Council and intended to help nations understand and evaluate AI readiness.⁴ Each metric is assessed on a five-point scale, informed by a combination of quantitative indicators and qualitative evidence. Quantitative inputs include internationally recognized indices and global rankings, and comparative datasets track country performance in areas such as AI skills. Qualitative inputs capture the broader institutional context, including case studies, policy and strategy implementation records, and an assessment of institutional and policy efficacy. Together, these data sources provide a more holistic and context-sensitive basis for evaluation than they would offer independently. To reduce the risk of subjectivity, scoring draws on triangulated sources and consistent calibration across countries.

This paper uses a subset of this framework focused on human capital, which measures countries on national skilling

programs, immigration pathways, and AI talent pools. All metrics carry equal weight and are scored out of five. An explanation of the scale follows.

1—Very limited: The country shows minimal activity or capability in this area, with significant gaps and little evidence of effective policy action. Progress is absent or at an early, undeveloped stage.

2—Weak: Some initiatives or structures exist, but they are fragmented, under-resourced, or inconsistently implemented. Overall performance remains below international norms.

3—Moderate: The country demonstrates steady but uneven capability, with clear policies or assets that are only partially realized. Performance aligns with global averages but lacks coherence or depth.

4—Strong: The country shows well-developed capacity with consistent implementation and measurable results. Policies and institutions are effective, though gaps or inefficiencies remain.

5—Leading: The country performs at a best practice or globally competitive level. Capabilities are mature and comprehensive, and consistently deliver high-impact outcomes.

Category score	Subcategory	Subcategory score
Human capital 3.3 out of 5 <i>Moderate</i>	National skilling programs	3.5
	Immigration pathways	3
	AI talent pool	4

■ The Indian government's approach to AI

Contemporary India's approach to AI policy is driven by use cases, which can be scaled in sectors with the highest social and economic returns.⁵ Priority sectors include education, healthcare, energy, agriculture, and financial services.⁶ The focus on use cases is driven in part by the large share of India's workforce, approximately 90 percent, that is categorized as "informal."⁷ NITI Aayog, the Indian government's think tank, notes that, "By embedding intelligent systems across sectors ranging from labor markets and financial services to health-care, skilling and social protection, India can integrate informal trade workers into the mainstream of the Fourth Industrial Revolution, ensuring that technology becomes a driver for opportunity, not displacement."⁸

Simultaneously, the government of India (GoI) has also sought to democratize access to computational power by providing compute resources to educational institutions at accessible prices. Affordable compute is a critical enabler given that access to GPUs is often cited as the primary barrier to quality AI education.⁹ The World Bank AI Handbook identifies India's participation in the global AI value chain, alongside Malaysia, Brazil, and Vietnam, as linked to its AI infrastructure base.¹⁰ GoI has explicitly recognized that compute access for universities is as fundamental a policy question as broadband access.¹¹

India's AI strategy explicitly positions the public sector as an early adopter and validator of AI tools. The deployment of AI in financial fraud detection at the State Bank of India and NITI Aayog's coordination of AI use cases in public services send a market signal that accelerates broader national uptake.¹² By demonstrating the usefulness and accessibility of AI within public services, the state lowers the perceived risk of adoption for private-sector organizations and citizens.

■ India's AI talent ecosystem

India's AI talent ecosystem is marked by rapid growth, supported by government policies on education and certification, bilateral agreements setting up AI labs, and partnerships with global AI industry leaders.

National skilling programs

The reach and effectiveness of government initiatives in deepening and democratizing AI literacy and fluency across both the private and the public sector are critical in widening the benefits of the technology. Given the government's

historically prominent role in education, the success of these programs is instrumental to meeting the demand for AI talent and ensuring sustainable economic growth through an AI-ready population.¹³

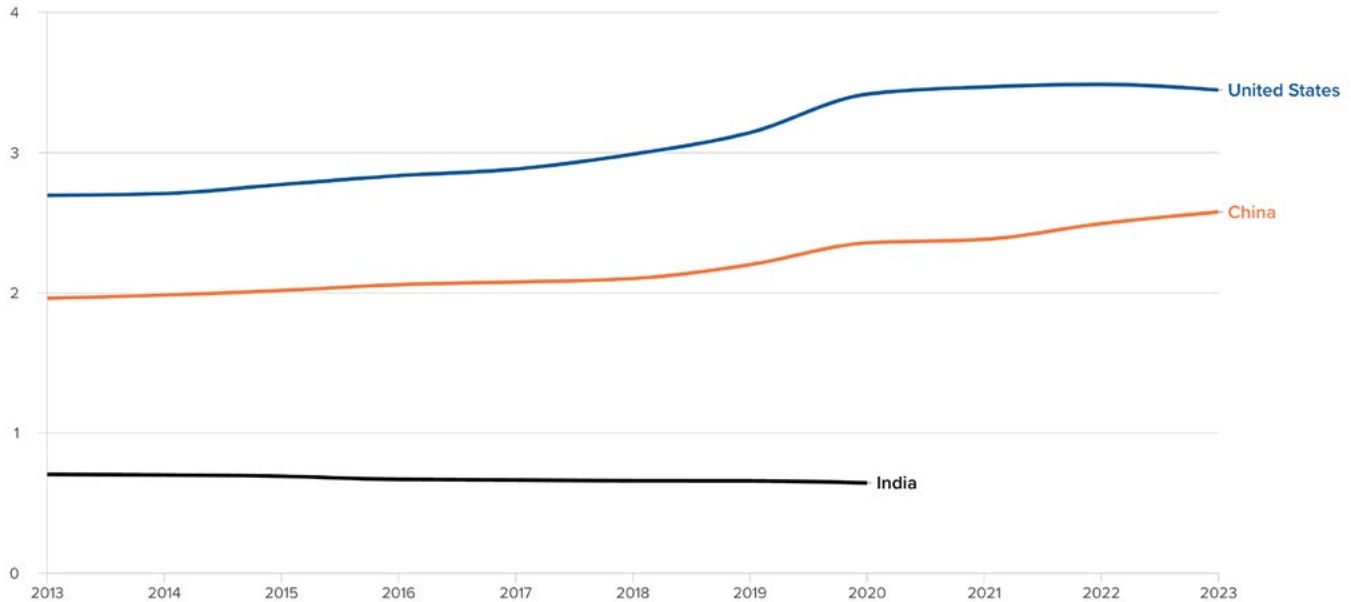
The scale of India's skilling initiatives is globally competitive. FutureSkills PRIME, a digital skilling initiative by the Ministry of Electronics and Information Technology and the National Association of Software and Services Companies (NASSCOM), an industry association, has 3.2 million learners.¹⁴ The initiative incentivizes learners by partially refunding course fees (for paid courses) or providing modest compensation if they enroll for a paid course (for unpaid courses). A European Commission report on benchmarking skilling initiatives globally ranked FutureSkills third out of forty-seven on performance metrics.¹⁵ The long-term success of this initiative rests on its ability to turn these enrollments into certifications. As of August 2025, the number of candidates who successfully completed courses sat at 337,000.

The National Education Policy (NEP) 2020 sought to modernize the school curriculum, introducing AI coding and data science courses for all school-going children aged 8 and up starting in 2026.¹⁶ Prior to this, in 2019, the Central Board of Secondary Education (CBSE), the largest national education board in the country, began offering AI modules for children in high school.¹⁷ At the university level, the All India Council for Technical Education (AICTE), which is responsible for planning and coordination of undergraduate and graduate education, integrated AI across all IT-related programs.¹⁸ Despite a strong showing on AI skills development, low female labor force participation remains a structural barrier to tapping into the country's full talent potential.¹⁹

Finally, in view of India's "public sector as early adopter" model, an AI-fluent workforce in government is an important enabler for broader adoption. Furthermore, if the bureaucracy becomes AI literate, it lowers the friction of doing business for the private sector. The National AI Competency Framework, based on a United Nations Educational, Scientific, and Cultural Organization (UNESCO) framework and launched in March 2025, targets 3.1 million civil servants for skill building to integrate AI into public service delivery.²⁰ Simultaneously, iGOT Karmayogi is a training platform that outlines recommended competencies for civil servants and provides training modules for them.²¹

India is ahead of the global curve in recognizing the importance of reforming the K–12 pipeline, orienting it toward AI-relevant coursework, and instituting initiatives to train its large public sector to become AI literate.

Chart 1: R&D as a percentage of GDP (2013–2023)



Source data: World Bank⁴²

As most initiatives are in their early days, with gaps in terms of even implementation and outcomes, India earns a score of 3.5 on our scale.

AI talent pool

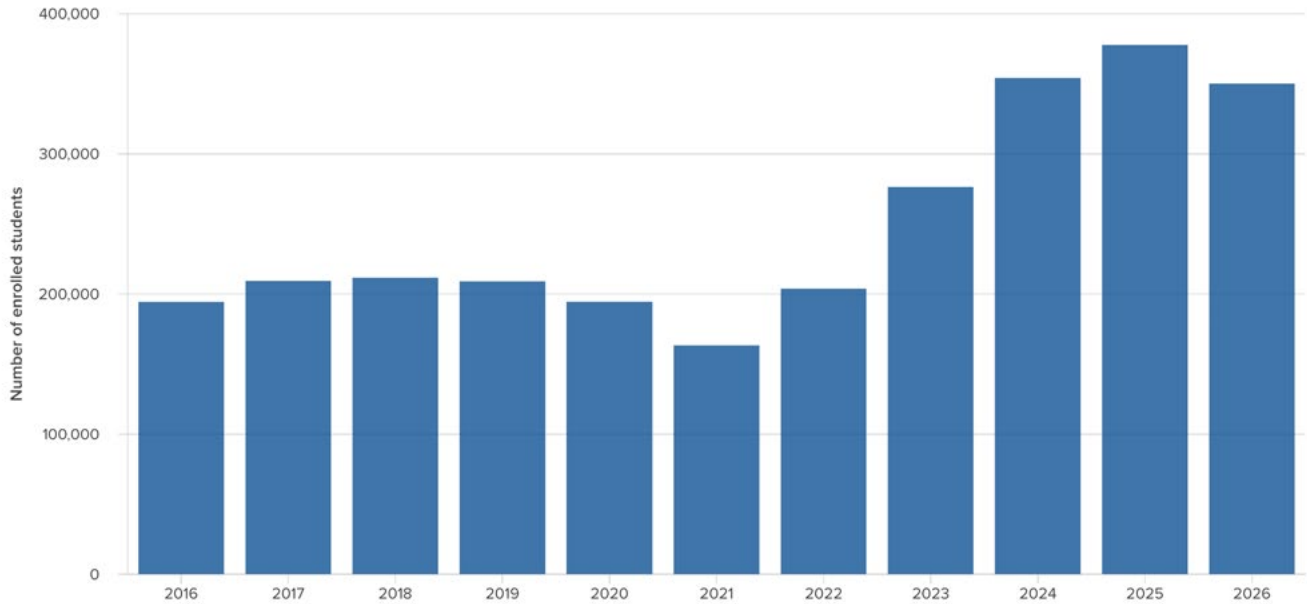
The scale, density, and research depth of India's current AI workforce will determine the country's foundational strength within the global AI landscape.

India is the world's second-largest producer of AI talent.²² Its professional AI workforce has grown rapidly and is projected to more than double from 600,000 in 2024 to 1.25 million by 2027.²³ The Stanford AI Index ranks India second globally in AI skill penetration rates for the period between 2015 and 2024.²⁴ In the same period, India saw a 252-percent increase in AI talent concentration. However, industry is still expected

to face a shortfall because the demand for AI roles in India is projected to scale to more than two million by 2027.²⁵ The 2025 Hays Global Talent Tracker—which, in plain terms, measures how quickly organizations are able to scale and adapt to changing market conditions, based on existing labor regulations—ranks India seventh globally on talent market flexibility.²⁶ This metric implies a business-friendly environment, although it might also signal relatively weak employee protections.

India brings competitive scores on headline metrics such as authorship of highly cited AI research and patented inventions. For example, India ranks fifth globally in generative artificial intelligence (GenAI) patents published between 2014 and 2023.²⁷ Cities like Bengaluru and Hyderabad have become internationally recognized innovation hubs, producing large cohorts of STEM graduates and hosting major research and development (R&D) operations for global technology firms. At the same time, India spends only 0.65 percent of gross domestic

Chart 2: Number of Indian students enrolled in US universities (2016–2026)



Source: DHS

Source data: SEVIS Data Mapping Tool⁴³

product (GDP) on R&D, compared to China’s 2.58 percent or the United States’ 3.45 percent.²⁸

Therefore, while GoI’s use case focus seeks to bring the benefits of AI to its population by scaling applications rapidly, the comparatively low R&D spending could be a barrier to achieving significant innovative breakthroughs and retaining AI researchers who might prefer to move elsewhere where funding and salaries are more competitive.²⁹

The core challenge for India is converting its high volume of AI-relevant graduates into research and specialized expertise required for AI leadership, which earns it a score of four on our scale.

Immigration pathways

There is stiff global competition for AI talent. India must contend with other countries not just for these global flows but also for its own homegrown talent. Structural and policy factors will determine whether India remains a net exporter

of talent or successfully evolves into a global destination for top-tier AI experts.

India is a top exporter of STEM talent broadly, as well as top-tier AI research talent.³⁰ It experiences high rates of brain drain to advanced economies, as promising talent often leaves for other countries for work or to pursue advanced degrees.³¹ The tide of emigration is showing some signs of abating, however, due to a mix of factors including a chill on immigration in developed Western economies. Immigration pathways have become restrictive in certain historically popular destinations—such as the United States, Canada, Australia, and the United Kingdom—with newly stringent screening requirements, caps on temporary immigration numbers, and prohibitive fees.³² Although the United States still attracts more talent than it loses, its retention rate declined by nearly 90 percent between 2022 and 2025.³³

The Indian government has signed memoranda of understanding (MoUs) with more than twenty countries on labor mobility and mutual recognition of qualifications.³⁴ Some of these MoUs also facilitate skilling opportunities in partnership with

overseas educational and research institutions. For example, Canada and India signed thirteen MoUs in 2026 between their respective institutions, covering student exchanges and research collaboration.³⁵ Additionally, in December 2024, the Indian Ministry of Home Affairs introduced a Group of Twenty (G20) talent visa for scholars, researchers, and faculty from G20 countries.³⁶ By presenting skilling and training opportunities through exchanges, these measures might encourage promising talent to stay in India and attract overseas talent as well, although their effectiveness will need to be measured over the coming years.

Finally, GoI is working to provide incentives for science and technology talent to return to India. For example, the Ministry of Science and Technology now provides grants for returning expatriates, with an incentive package of INR 8.7 million (approximately \$91,000).³⁷

Whether India can fully turn the tide on talent flows depends on consistent implementation of policies to retain top AI talent, creating pull factors to complement the push factors coming from a chill on immigration pathways in advanced Western economies. The coming years might present a clear inflection point, earning India a score of three on our scale.

Recommendations for the government of India

First, India's national AI skilling initiatives will benefit from addressing the gap between high enrollment numbers and verified certification completion. While platforms like FutureSkills PRIME mobilize millions of learners, a drop-off occurs before final assessments. Bridging this gap is essential to transforming the "AI-curious" learners into a certified, competent workforce. Course fees are also high for the average working Indian: up to INR 21,995, which is near the median monthly wage.³⁸ Moving evaluation metrics from enrollment numbers to completed credentials will ensure public funds drive measurable outcomes.

The government of India should tie funding of skilling initiatives to industry partnerships that guarantee interviews or placement.

Second, the lack of granular AI adoption metrics to inform workforce development policies is a challenge for India. Policymakers cannot make strategic decisions without knowing where AI is creating value. Standard AI adoption metrics are increasingly irrelevant because individual AI use is highly

varied. The Anthropic Economic Index 2025 finds that the top five countries in Claude.ai usage globally are the United States, India, Japan, the United Kingdom, and South Korea, but usage patterns differ considerably by education level, task type, and economic context.³⁹ Policymakers risk funding training programs that oversupply entry-level certifications while failing to address the highly specific skills in demand in the labor market.

To pivot skilling and certifications for where the market is, the Ministry of Electronics and Information Technology (MeitY) should collaborate with frontier AI labs, many of which have a physical presence in India, to leverage data on task-level uses of AI.

Third, India should position itself not just as a global talent incubator but as a destination for top AI talent. With 0.65 percent of GDP spent on national R&D, Indian institutions are unable to offer the compensation or computational resources found in other emerging and developed economies. Without structural interventions, India's most promising undergraduate talent will continue to emigrate for advanced studies and job opportunities. While opportunities for returning talent exist, GoI, partnering with universities and industry, must improve their scale and sustainability. For comparison, China's "Thousand Talents" program offers incentives of up to \$500,000 for returnees.⁴⁰

The Ministry of Science and Technology should partner with homegrown and global tech companies to launch a fund that gives select returning AI talent up to \$150,000 in start-up grants and incentives.

Transferrable insights

India's AI talent playbook demonstrates that a country can build global-scale AI relevance through strategic government investment, use case focus, and infrastructure democratization, even while structural gaps remain.

First, India's use-case-based, public-sector-first approach is well suited to countries with large informal workforces, where the priority is integrating AI into existing economic activity rather than producing frontier models. Emerging economies could identify sectors in which AI can address a documented public service delivery gap and build enabling infrastructure.

Emerging economies should sequence AI workforce strategy around use case deployment in select, high-impact sectors.

Second, India's deployment of its AI Competency Framework, paired with an existing central platform (like iGOT Karmayogi) and aligned with international benchmarks (like UNESCO's AI Competency standards), can help fast-track AI fluency in government.

Emerging economies do not need to build training platforms for their public sectors from scratch. India's successful deployment of UNESCO's AI Competency Framework demonstrates that models exist and can be scaled to meet a country's needs.

Third, emerging economies should be ready to leverage the global shift in immigration policy. Emerging economies often view the immigration of top tech talent to advanced economies in the West as an enduring loss. The tide of brain drain can be stemmed through partnerships allowing for training opportunities in other countries paired with incentives for returnees. India also benefits from its diaspora, which pours venture capital and mentorship back into cities such as Bengaluru and Hyderabad.⁴¹

Emerging economies experiencing brain drain should maintain strong ties with their diaspora and institute incentive programs that turn the drain into circulation, enabling mobility for top-tier AI talent and opportunities to contribute their skills and investment to their countries of origin.

Fourth, by partnering directly with an industry body (NASSCOM) for the FutureSkills PRIME initiative, the Indian Ministry of Electronics and IT sought to ensure that the skills being taught were aligned with industry demand.

Creating an AI-ready workforce requires public-private partnerships for skilling initiatives to ensure there is a baseline guarantee that certifications and degrees are translated into a professional AI workforce.

■ Conclusion

Preparing a population of nearly 1.5 billion for an AI-enabled economy is no small task. India's playbook for this challenge spans from K–12 education to compute resources for universities, certification aligned with industry standards, and training for its massive bureaucracy. Through these coordinated public and private interventions, India aims to transform its home-grown AI talent into an engine of technological innovation and inclusive growth.

About the author

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About the center

The Atlantic Council GeoTech Center has a mission to shape the future of technology and data to advance society.

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