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The Next Decade of Indian Education

Which skills, degrees and disciplines will matter between 2026 and 2036

IN THIS REPORT

- Five forces reshaping Indian work, from generative AI to an ageing population
- A five-layer framework for shaping future skills
- The degree families likely to gain value, and three bets explained
- Disciplines that will grow, transform or contract
- Actions for institutions, policymakers, students, parents and employers

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About this report

This report examines how India's higher-education system should respond to generative AI, industrial policy, demographic change and graduate unemployment over the decade from 2026 to 2036. It draws on research and data from the World Economic Forum, the International Labour Organization, NITI Aayog, the Economic Survey 2025-26, the All India Survey on Higher Education, the India Skills Report, the Stanford Digital Economy Lab, the McKinsey Global Institute and sector studies on semiconductors, green jobs and the health workforce.

Figures reflect sources published up to November 2026. Forecasts are directional; the report states its main uncertainties in the final section.

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EXECUTIVE SUMMARY

Idea in Brief

THE PROBLEM

India is producing graduates faster than it is producing graduate jobs. Higher-education enrolment reached about 4.33 crore students in 2021-22, more than a third of undergraduates study arts, and the unemployment rate for graduates is roughly four times the national rate. Into this mismatch arrives generative AI, which targets precisely the routine cognitive work that absorbed Indian graduates for three decades.

WHY IT IS HAPPENING NOW

Indian higher education was built for a labour market that paid for credentials. A degree signalled trainability; the IT-services pyramid, government recruitment and campus placement converted that signal into a salary. Each converter is weakening at once. The five largest IT services firms ended FY26 with fewer employees than they started with, TCS has cut its planned fresher intake from more than 40,000 a year to about 25,000, and NITI Aayog warns that the tech-services workforce could shrink from about 8 million to 6 million by 2031 if nothing changes.

THE ARGUMENT

The next decade will not reward degrees in general, or technology degrees in particular. It will reward a specific combination: a deep domain anchored in physical, regulated or relational reality; fluency in working alongside AI systems; and judgement that can be demonstrated rather than certified. Health sciences, electronics and semiconductors, energy and climate, AI and cybersecurity with real depth, and re-tooled core engineering will gain value. Disciplines built on codified information processing — mass-market commerce and arts programmes without applied content, back-office-oriented computing degrees, and generalist management — will shrink or will have to transform.

THE WAY FORWARD

Universities should use the credit architecture of NEP 2020 to rebuild the bachelor's degree around apprenticeship, verification-heavy assessment and multidisciplinary depth. Regulators should allocate seats by outcome data rather than by applicant demand. Students should evaluate a programme by four tests — domain moat, AI fluency, real work, and published outcomes — rather than by the prestige of its label.

SECTION 1

Five Forces Reshaping Indian Work, 2026–2036

For three decades an Indian degree worked like a conveyor belt. A student entered a large, standardised programme, acquired codified knowledge, cleared an examination and was loaded onto a large, standardised employer that would finish the training on the job. The model was never elegant, but it scaled. Five forces are now dismantling it at the same time, and their interaction matters more than any one of them alone.

1. Generative AI is removing the bottom rung, not the whole ladder

The most careful evidence so far suggests that AI's first labour-market effect is concentrated on entry-level work. The ILO's 2025 refined index finds that about one in four workers globally is in an occupation with some exposure to generative AI, with clerical work the most exposed; only 3.3% of employment sits in the highest-exposure category. Exposure, in other words, mostly means transformation of tasks rather than elimination of jobs.

The transformation, however, is not evenly distributed by age. Using payroll records from ADP, Erik Brynjolfsson, Bharat Chandar and Ruyu Chen at Stanford's Digital Economy Lab found that since late 2022, workers aged 22 to 25 in the most AI-exposed occupations experienced a 13% relative decline in employment after controlling for firm-level shocks. Employment of young software developers fell by nearly a fifth from its peak, while older workers in the same occupations kept gaining. Where AI augmented rather than automated work, employment of young people held up.

India's problem is that the bottom rung is where its volume sits. The country's IT-services model was a pyramid: very wide at the base, built on freshers who did testing, maintenance and support. That base is now narrowing. The combined headcount of TCS, Infosys, HCLTech, Wipro and Tech Mahindra fell by 7,389 in FY26, and TCS has guided to about 25,000 fresher hires in FY27, against 40,000 to 42,000 in earlier years. NITI Aayog's October 2025 *Roadmap for Job Creation in the AI Economy* frames the choice starkly: under business as usual the tech-services workforce shrinks from 7.5–8 million in 2023 to about 6 million by 2031; with coordinated action it could grow to 10 million and generate up to 4 million new roles. The Economic Survey 2025-26, which devoted a full chapter to AI for the first time, drew the educational conclusion directly: the traditional separation between formal education and work experience is becoming untenable as AI outperforms entry-level workers on routine cognitive tasks.

2. Capability, not cost, is India's new export

The same wave that is thinning the services pyramid is thickening a different structure. According to the Zinnov–Nasscom landscape report for FY26, India now hosts 2,117 global capability centres (GCCs) employing 2.36 million professionals, and accounts for roughly 28% of the global GCC AI talent pool. Industry projections put GCC employment near 3.5 million by 2030. GCCs hire differently from services firms. They want product managers, domain specialists, engineers who understand the parent company's business, and people who can own a problem end to end. The shape of demand is shifting from a pyramid to a diamond — fewer generic juniors, more mid-level specialists — and education must shift with it.

3. Industrial policy is pulling demand back toward atoms

For a generation, the prestige gradient in Indian technical education ran from hardware to software. Policy is now pushing the other way. India's semiconductor market is projected to grow from $54.3 billion in 2025 to $103.5 billion by 2030, with India Semiconductor Mission projects worth about ₹1.6 lakh crore, and an industry estimate of the semiconductor talent pool rising from about 250,000 to nearly 400,000 by 2030. On energy, India has committed to 500 GW of non-fossil capacity by 2030 and net zero by 2070; the Skill Council for Green Jobs estimates the transition could create up to 35 million green jobs by 2047, including roles in renewables, electric mobility, green construction and waste management. These are jobs that require physical systems knowledge, safety discipline and regulatory understanding — areas where AI assists but does not substitute.

4. Demography is turning, and care is the growth industry nobody markets

India's demographic dividend is real but temporary. The UNFPA–IIPS *India Ageing Report 2023* projects that the share of people aged 60 and above will rise from 10.1% in 2021 to 15% by 2036 and 20.8% by 2050, and that the elderly will outnumber children by about 2046. The health workforce is already short: a WHO estimate cited in Indian policy work puts the requirement at roughly 1.8 million additional doctors, nurses and midwives to reach 44.5 health workers per 10,000 people by 2030, and India has about two nurses per 1,000 people against a WHO benchmark of three. The WEF's global survey makes the same point from the demand side: nursing professionals, social workers and teachers are among the jobs expected to grow most in absolute terms.

5. The credential is inflating while its signal weakens

The final force is internal to education. Data For India's analysis of PLFS data shows a graduate unemployment rate of about 13% in 2024, against 3.2% for the workforce as a whole, with 85% of unemployed graduates under 30. An analysis of PLFS 2025 data reported in *The Hindu* put unemployment among tertiary-educated youth aged 18–29 at 29.4%, with 40.1% of them neither employed nor in education or training. Meanwhile NEP 2020 targets a gross enrolment ratio of 50% by 2035, up from 28.4% in 2021-22 — roughly 3.5 crore additional seats. If India doubles its graduate output without changing what graduates learn, it will double the mismatch rather than the dividend.

SECTION 2

How Future Skills Should Be Shaped

The public debate in India still frames skills as a contest between “hard” technical skills and “soft” human ones. The evidence points to a different conclusion: the valuable graduate of 2035 will hold a layered stack, and the most important shift is from skills of *production* to skills of *verification and judgement*.

What the evidence says

The WEF *Future of Jobs Report 2025*, based on more than 1,000 employers representing over 14 million workers, finds that employers expect 39% of workers' core skills to change by 2030. India's expected disruption, at 38%, is the highest among the BRICS economies. The three fastest-growing skills are AI and

big data, networks and cybersecurity, and technological literacy. But the rest of the top ten are largely human: creative thinking; resilience, flexibility and agility; curiosity and lifelong learning; leadership and social influence; talent management; analytical thinking; and environmental stewardship. Analytical thinking remains the single most demanded core skill, cited by seven in ten employers.

Two findings in the same report deserve more attention than they get. First, manual dexterity, endurance and precision shows a net decline for the first time, with 24% of employers expecting it to matter less — yet the growing jobs that do need manual skill (electrotechnology engineers, mechanics, solar installation engineers) demand *higher* proficiency combined with technical literacy. Physical work is not disappearing; low-skill physical work is. Second, an Indeed analysis for the report assessed more than 2,800 granular skills and found none with a "very high" capacity to be replaced by current generative AI; 69% showed low or very low substitutability. Skills that rely on physical execution, nuanced judgement and human interaction are the least exposed.

The McKinsey Global Institute's November 2025 study, *Agents, robots, and us*, adds an important nuance. It estimates that demonstrated technologies could in theory automate activities accounting for about 57% of US work hours — but also that more than 70% of today's skills are used in both automatable and non-automatable work. Skills are not being deleted; they are being redeployed into new contexts. The fastest-moving signal in hiring is demand for AI fluency — the ability to use and manage AI tools — which grew roughly sevenfold in US job postings in two years.

India's own policy documents now say the same thing. The Economic Survey 2025-26 argued that India should move away from narrow technical specialisation toward foundational abilities such as reasoning, communication, judgement and adaptability. Mercer's *India Graduate Skill Index 2025* shows how far there is to go: only about 46% of graduates met the employability bar on learning agility.

The five-layer stack

Taken together, the evidence suggests that future skills should be designed as five layers that compound on one another.

Exhibit 1 · The future skills stack

Layer	What it means in practice	How institutions build it
1. Durable foundations	Quantitative reasoning, statistical sense, clear argument in writing and speech, the scientific method	Fewer, deeper core courses; writing and estimation assessed in every year
2. AI fluency	Framing problems for AI systems, checking outputs, redesigning workflows, understanding failure modes and governance	AI embedded in every discipline, not a single elective; assessment of how students verify AI output
3. An anchored domain	Deep knowledge of a field tied to physical systems, regulation or human relationships — health, energy, chips, infrastructure, law, public systems	Majors with labs, clinics, field placements and industry-set problems
4. Human-centred capability	Leadership and influence, empathy, negotiation, teaching and mentoring, ethical reasoning	Team projects with real stakeholders, client work, structured feedback
5. Meta-skills	Learning agility, resilience, self-direction, career navigation	Multiple entry and exit, stackable credentials, reflective portfolios

Source: Business Frontiers analysis drawing on WEF (2025), McKinsey Global Institute (2025) and the Economic Survey 2025-26.

The design principle: from production to verification

The most useful single idea for curriculum designers is that AI makes *producing* a first draft cheap and *judging* it expensive. A student who can generate a market-sizing model in ten minutes is no longer scarce; a student who can tell that its growth assumption is implausible for Tier-3 India is. A graduate who can write code with an assistant is common; one who can review it for security flaws, latency and maintainability is not.

This has three implications. Foundations such as mathematics and writing remain essential even though the WEF shows a small net decline in demand for them as standalone tasks: they are the instruments of verification. Assessment must shift from recall, which AI makes trivial, to defended judgement — oral examinations, studio critiques, live cases and code reviews. And depth in a domain becomes more valuable, not less, because verification requires knowing what "right" looks like in a specific context.

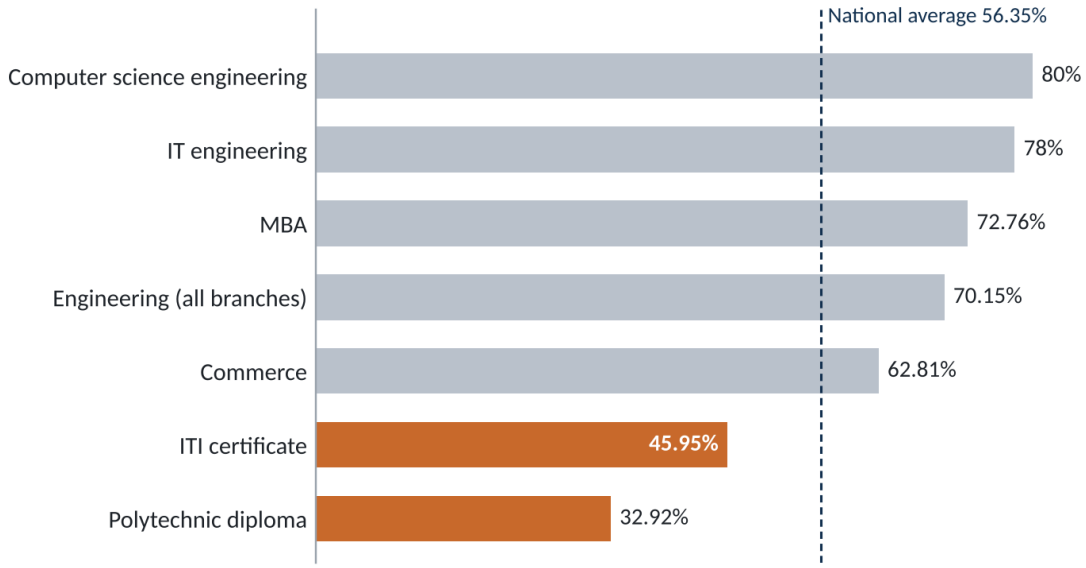
SECTION 3

Degrees Likely to Gain Value, 2026–2036

The degrees that will gain value over the next decade share one trait: they attach a scarce, hard-to-automate domain to AI-era tools. Today's employability rankings are a useful starting point but a poor guide to the future.

Exhibit 2 · Vocational graduates test far below degree holders

Share of assessed candidates rated employable, by stream (%)



Source: India Skills Report 2026 (Wheebox/ETS with CII, AICTE and AIU), based on more than 100,000 Global Employability Test candidates.

The *India Skills Report 2026* puts national employability at 56.35%, up from 46.2% in 2022. Computer science and IT engineering lead; MBA employability fell to 72.76% from 78% a year earlier, while commerce rose to 62.81% from 55% on the back of BFSI and fintech hiring. Two cautions apply. The measure is a test-pass rate among assessed candidates, not an employment outcome. And computer science's 80% score coexists with a sharp fall in fresher hiring — graduates can be assessed as ready for

jobs that are becoming scarcer. The ranking tells us where preparation is strong today, not where demand will be in 2035.

Exhibit 3 · Where degree value is heading

Degree family	Why demand grows	Exposure to AI substitution	Outlook to 2036
Nursing, allied health and public health (BSc Nursing, physiotherapy, lab and imaging technology, MPH, geriatric care)	Ageing population; a gap of roughly 1.8 million health workers; global demand for Indian nurses	Low — physical, relational and licensed	Strong growth
Electronics, electrical and VLSI engineering	Semiconductor market roughly doubling by 2030; EVs; grid modernisation	Low to medium — design tools automate, fabs and systems still need people	Strong growth
Energy, environmental and climate science and engineering	500 GW non-fossil target by 2030; up to 35 million green jobs by 2047	Low — field-based and regulated	Strong growth
AI, data and cybersecurity, with real depth	Among India's fastest-growing roles in the WEF survey; GCC AI build-out	High for routine coding; low for architecture, security and governance	Growth, but polarised
Re-tooled core engineering (mechatronics, robotics, civil with construction technology)	Infrastructure and manufacturing build-out; scarcity after years of course closures	Low to medium	Growth from a shrunken base
Specialised management (technology, healthcare, operations and supply chain, sustainability)	GCCs and industrial projects need managers who understand the domain	Medium	Growth for specialised; flat for generalist
Applied commerce, fintech and analytics-led finance	BFSI and fintech hiring	High for bookkeeping; lower for risk, advisory and audit judgement	Growth if applied; decline if generic
Law, public policy and economics with quantitative training	Regulation of AI, data and climate finance; state capacity	Medium — drafting automates, judgement does not	Moderate growth
Teacher education and learning design	NEP rollout; teachers among the largest absolute job gains in the WEF survey	Low to medium	Steady growth

Source: Business Frontiers analysis of sources listed at the end of this report.

Three bets worth explaining

Health is India's most underpriced degree. Status hierarchies in Indian families place nursing and allied health well below engineering, yet the economics run the other way. Demand is driven by an ageing population and chronic disease, the work is physical and relational, and qualifications travel: Indian nurses are in demand across the Gulf, Europe, Japan and the UK. A WHO-linked study in *Human Resources for Health* estimated that investment in expanding India's health workforce could generate about 5.4 million additional jobs within the sector. Few other degree families combine domestic shortage, global mobility and low AI substitutability.

Hardware is having its revenge. Between 2012-13 and 2024-25, AICTE data show that 454 BE/BTech mechanical and 409 civil engineering programmes closed, while colleges converted seats into computer

science and AI. That creates a scarcity premium just as semiconductors, electric mobility, renewable energy and infrastructure need engineers who understand physical systems. Early signals are visible: in Telangana, admissions to civil, mechanical and allied branches rose between 2024 and 2026 even as computer science and IT admissions declined. The winning version of these degrees will be hybrid — mechanical with mechatronics and data, civil with digital construction, electrical with power electronics and embedded software.

Computer science remains valuable, but it is no longer a safe default. The 2024-25 session alone added more than 2 lakh engineering seats, most of them in computer science and AI branches. Meanwhile the entry-level work those graduates once did is the work AI absorbs first. Value in computing will migrate toward depth — systems, security, ML engineering, AI evaluation and governance — and toward computing combined with a domain such as health, finance or manufacturing. A generic CS degree from an average college is becoming what a generic BCom became a generation ago: a crowded credential with a weak signal.

For business schools the lesson is similar. The fall in MBA employability in the 2026 report is consistent with a market that pays less for generalist management and more for managers who can run technology, healthcare, supply-chain or sustainability operations with AI in the loop.

SECTION 4

Disciplines That Will Grow, Transform or Contract

The more useful question is not which disciplines will "die" but which will grow, which must transform to survive, and which will contract in their current form. The dividing line is how much of a discipline's graduate work consists of codified information processing that AI now does cheaply.

Exhibit 4 · The direction of travel, by discipline

Discipline	Direction	Main reason
Nursing, allied health, public health, geriatric care	Grow	Ageing, chronic disease and a large domestic shortfall; low AI substitutability
Electronics, VLSI, power and embedded systems	Grow	Semiconductor mission, EVs, data centres and grid build-out
Energy, environmental and climate science; carbon measurement and verification	Grow	Net-zero commitments and green-job creation
AI and ML engineering, cybersecurity, data engineering	Grow	Fastest-growing skills globally and in India; geopolitical security demand
Materials science and applied chemistry	Grow	Batteries, semiconductors and advanced manufacturing
Agricultural science and food technology	Grow, moderately	AI applications in agriculture and climate adaptation; farmworkers among the largest absolute job gains globally
Computer science (general)	Transform	Routine coding and testing automate; systems, security and evaluation do not

Discipline	Direction	Main reason
Management	**Transform**	Generalist roles weaken; domain-specific and AI-enabled operations strengthen
Law	**Transform**	Drafting and research automate; advisory, litigation and AI and data regulation grow
Accounting and finance	**Transform**	Bookkeeping automates; audit judgement, risk and advisory grow
Journalism, media and design	**Transform**	Content production automates; editorial judgement and creative direction remain
Generic BA and BCom pass programmes without applied content	**Contract**	Weak signal, high enrolment, work closest to what AI does well
Programmes preparing for clerical, data-entry and back-office roles	**Contract**	Clerical work has the highest AI exposure in the ILO index
IT support and routine testing-oriented computing diplomas	**Contract**	Roles NITI Aayog flags as at risk of obsolescence

Source: Business Frontiers analysis drawing on WEF (2025), ILO–NASK (2025), NITI Aayog (2025) and AISHE 2021-22.

Why the growth list is physical, regulated or relational

The growing disciplines share a structural feature. Their work is either physical (a fab, a solar plant, a patient), regulated (licensing, safety, environmental compliance) or relational (care, teaching, negotiation). Each of these creates friction for automation. AI can design a circuit layout faster, but someone must qualify the process in a cleanroom. AI can triage a scan, but a licensed professional must act on it and a nurse must deliver the care. This is why the WEF survey shows frontline and care roles growing in absolute terms alongside technology roles, and why the Indeed analysis found the lowest substitution potential in skills requiring physical execution and human interaction.

What contraction will actually look like

The WEF list of the fastest-declining jobs is a map of what is shrinking: postal and bank clerks, data-entry clerks, cashiers and ticket clerks, administrative assistants and executive secretaries — now joined by graphic designers and legal secretaries, the first time knowledge-work roles of this kind have entered the list. NITI Aayog's roadmap similarly identifies quality-assurance engineers and support agents among the roles at risk in India's tech and customer-experience sectors.

The Indian programmes most exposed are those whose graduates feed these roles. That matters at scale because enrolment is concentrated precisely there. In AISHE 2021-22, arts accounted for 34.2% of undergraduate enrolment, with about 1.13 crore students in BA programmes, followed by science (14.8%), commerce (13.3%) and engineering and technology (11.8%). The MA alone accounted for 40.7% of postgraduate enrolment. Many of these are pass-course programmes with large classes, limited applied work and examination-centred assessment. They prepared graduates for clerical, administrative and entry-level service roles — the work AI is now absorbing.

Contraction is not the death of the humanities

It would be a serious mistake to read this as a case against the humanities and social sciences. The disciplines themselves become *more* relevant as AI spreads: someone has to decide what an AI system should be allowed to do, how a welfare algorithm affects citizens, how a product will be received in Bihar rather than Bengaluru, and what a contract actually commits a firm to. Psychology, economics, political science, philosophy and languages supply exactly the judgement, ethics and contextual understanding that the WEF and the Economic Survey identify as rising in value.

What contracts is a delivery model — the mass, low-contact, recall-assessed programme — not a field of knowledge. A history graduate trained in archival research, quantitative methods and policy writing, with an internship in a district administration, is well positioned for the next decade. A graduate who memorised notes for an annual examination is not, whatever the subject on the certificate.

SECTION 5

What Institutions and Policymakers Should Do

India already has much of the architecture it needs. NEP 2020 introduced the four-year undergraduate programme, multiple entry and exit, the Academic Bank of Credits and the National Credit Framework, which allows academic, vocational and experiential learning to earn credit on the same ledger. The gap is in use, not design: by mid-2025, 153 universities had implemented multiple entry and exit, benefiting about 31,000 undergraduates in a system of more than four crore students. Six moves would close it.

1. **Make the fourth year a work year.** Use the four-year degree's final year for a structured apprenticeship, research placement or industry project, credited through the Academic Bank of Credits. As employers shrink fresher intakes, universities must absorb part of the on-the-job training that firms once provided. The Economic Survey's warning about separating education from work experience is, in effect, a design brief.
2. **Assess judgement, not recall.** Replace a large share of written examinations with viva voce, studio critiques, live cases, lab practicals and code reviews in which students must defend, correct or reject AI-generated work. Recall-based examinations now measure little that employers value.
3. **Allocate seats by outcomes.** AICTE placed 58 colleges under progressive closure and discontinued more than 950 courses in 2025-26. That pruning should become systematic: approvals and expansions linked to published, stream-level data on employment, earnings and further study, not to applicant demand or a single blended placement figure.
4. **Invest where shortages are structural.** Expand nursing, allied health and public-health capacity with quality controls; fund laboratories for VLSI, power electronics and materials; and protect core engineering departments from conversion into undifferentiated computing seats.
5. **Retool faculty.** Faculty cannot teach AI-era practice they have not experienced. Pair sabbaticals in industry with professors of practice, and treat AI fluency as a teaching competency rather than a departmental specialism.
6. **Fix vocational quality, not just volume.** The 2026 India Skills Report shows ITI employability at 45.95% and polytechnic diploma holders at 32.92%. Growing roles such as electrotechnology engineers

and solar installation engineers demand high manual proficiency combined with technical literacy. Polytechnics should become the pipeline for these hybrid technician roles, with industry-run labs and recognised pathways into degree programmes.

At national level, NITI Aayog's proposal for a coordinated AI talent mission should be read as an education mandate as much as an industrial one. Its scenario gap — a tech workforce of 6 million versus 10 million by 2031 — is decided largely in classrooms over the next five years.

SECTION 6

What Students, Parents and Employers Should Do

Students should stop asking which branch is "best" and evaluate any programme against four tests:

1. **Domain moat.** Does the degree build expertise tied to physical systems, regulation or human relationships that AI cannot easily enter?
2. **AI fluency.** Will I learn to use, check and manage AI tools inside my discipline, not merely in a separate elective?
3. **Real work.** Are internships, labs, clinical hours or field projects built into the credits, or left to chance?
4. **Published outcomes.** What do employment and earnings data show for *this* stream at *this* institution?

A portfolio of verified work — projects, code reviewed by others, clinical logs, published analyses — will increasingly carry more weight than the degree title.

Parents should retire the status hierarchy of the 1990s. A nursing or power-electronics degree from a strong institution is a better bet for the 2030s than a computer science degree from a weak one.

Employers should keep the bottom rung alive. The Stanford evidence shows that firms are adjusting to AI mainly by not hiring the young, which saves money now and hollows out the leadership pipeline later. Two-thirds of employers in India told the WEF they plan to draw on more diverse talent pools, well above the global average of 47%, and many intend to move toward skills-based hiring. Co-designed apprenticeships with universities are the cheapest way to make that shift real.

SECTION 7

What Could Make This Forecast Wrong

Ten-year labour forecasts have a modest track record, and four uncertainties deserve explicit attention.

- **AI could move faster into physical work.** The WEF and Indeed analyses note that advances in robotics could erode the protection that physical execution now provides. If that happens before 2035, some "anchored" domains will be less sheltered than this report assumes.

- **Adoption could be slower than capability.** McKinsey stresses that its automation estimates describe technical potential, not forecasts, and the Economic Survey found no economy-wide displacement yet. Slower diffusion would give today's IT-services graduates more time.
- **The data are imperfect.** India Skills Report figures are test-pass rates, not jobs; PLFS estimates vary with age bands and definitions; green-job counts depend on contested classifications. Directions are more reliable than precise numbers.
- **Execution may lag ambition.** GER rose only from 27.9% to 29.2% between 2020-21 and 2022-23 against a 50% target, and multiple entry and exit remains marginal. Without implementation, the skills mismatch will persist regardless of which disciplines grow.

> *None of these uncertainties changes the central recommendation. A degree that combines an anchored domain, AI fluency and demonstrated judgement is robust across scenarios; a degree that relies on codified knowledge and a credential signal is fragile in almost all of them.*

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