AI-ML & DATA SCIENCE
TALENT LANDSCAPE

INDIA | 2025 – 26

A comprehensive analysis of talent pool, compensation, attrition and workforce behaviour across India's AI/ML ecosystem

April 2026

Peepal
20 YEARS OF TRUST

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EXECUTIVE SUMMARY — KEY FINDINGS 2025–26

2.75M+

Total AIML Talent Pool

55% YoY Growth

67%

Top 3 Industry Concentration

IT Services · GCCs · IT Product

82%

AI Leadership Talent Gap

Critical shortage, above global avg

₹20 LPA

Bangalore Median Comp.

+25% vs national avg

12.3%

Overall Attrition Rate

GenAI roles: 21–45%

~40%

Actively Switching Intent

74–84% passively open

01

OVERVIEW

Talent pool size · Industry distribution · Concentration analysis

TOTAL TALENT POOL — INDIA (2026)

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2,754,531

AIML Professionals in India

- 55% YoY growth from prior year
- Inclusive of Data Science & applied AI roles
- Data Science standalone: No 2025-26 direct aggregate
- Source: LinkedIn Talent Insights (2026)[1]

GROWTH CONTEXT

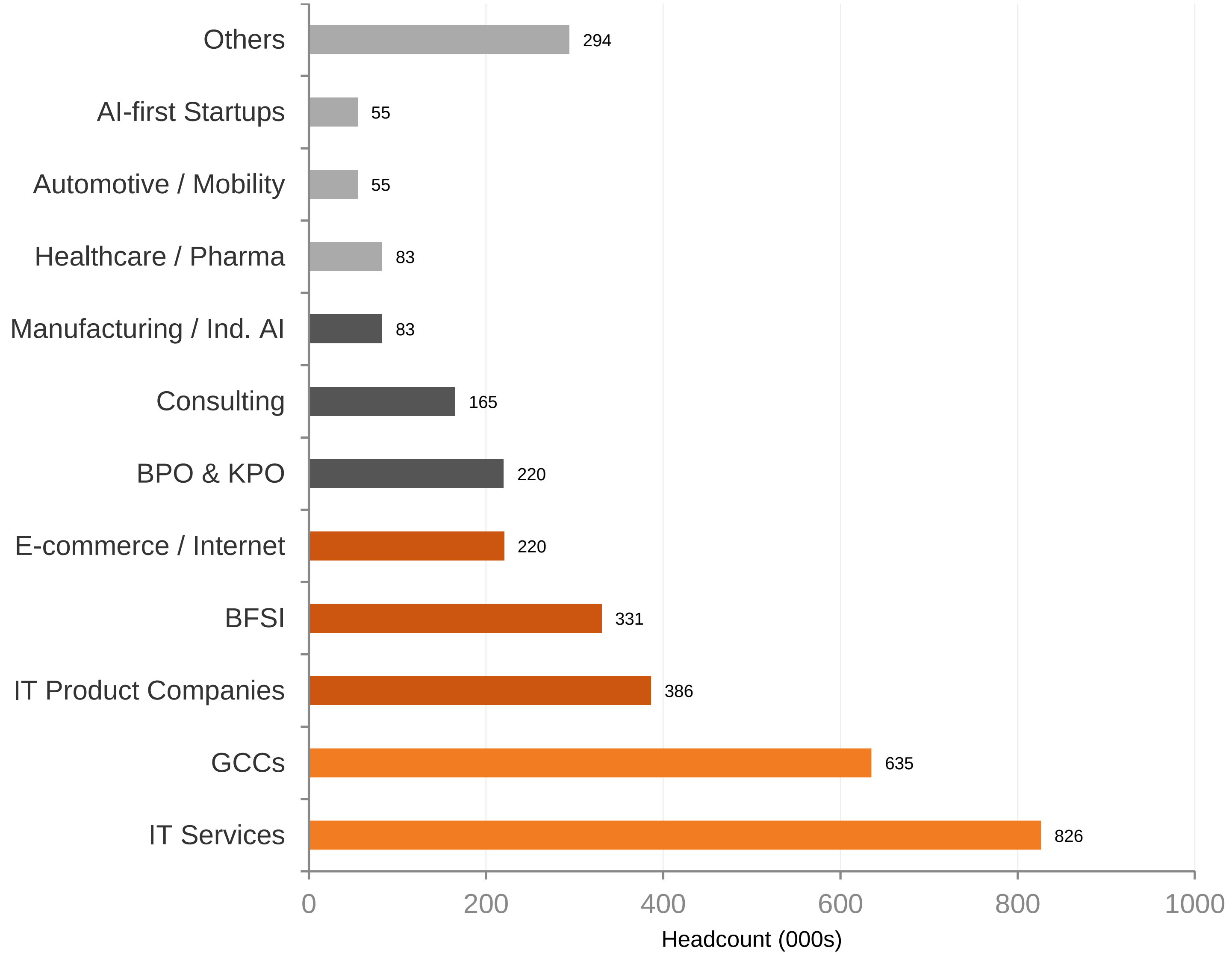
2026 Pool	**2,754,531**
YoY Growth	**+55%**
Data Sci (standalone)	**Included in pool**
Base Year	**2025 (direct)**

KEY IMPLICATION

India has the world's 2nd largest AI talent pool. At 2.75M professionals (55% YoY growth), the country is a critical global AI hub — but supply-side gaps persist in leadership, GenAI, and MLOps roles despite raw volume growth.

[1] LinkedIn Talent Insights 2026 | linkedin.com/pulse/india-now-has-275-million-aiml-professionals

INDUSTRY-WISE TALENT DISTRIBUTION (2026)



Industry	Headcount	%
IT Services	**826,000**	**30%**
GCCs	**635,000**	**23%**
IT Product Companies	386,000	**14%**
BFSI	330,000	**12%**
E-commerce / Internet	220,000	**8%**
Consulting	165,000	**6%**
BPO & KPO	220,000	**8%**
Manufacturing / Ind. AI	82,000	**3%**
Healthcare / Pharma	82,000	**3%**
Automotive / Mobility	55,000	**2%**
AI-first Startups	55,000	**2%**
Others	294,000	**11%**

E = Estimated (demand-share proxy) | P = Secondary Proxy (Quess) | R = Residual. Total = 2,754,531. Source: Quess Corp, NASSCOM, nareshit.com 2025–26.

INDUSTRY CONCENTRATION FRAMEWORK (2026)

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Top 3 Share	Top 5 Share	HHI Index	Fragmentation
67%	**87%**	**2,578**	**13%**
IT Services + GCCs + IT Product	High concentration confirmed	High concentration (>2,500)	Talent outside Top 5 industries

TOP 5 INDUSTRIES — CONCENTRATION BREAKDOWN

1	**IT Services**	826,359	30%	Outsourcing hubs (TCS, Infosys)
2	**GCCs**	635,000	23%	High comp, structured paths
3	**IT Product Cos.**	386,359	14%	SaaS / product companies
4	**BFSI**	330,544	12%	Fintech + banking AI
5	**E-commerce/Internet**	220,435	8%	Retail AI growth

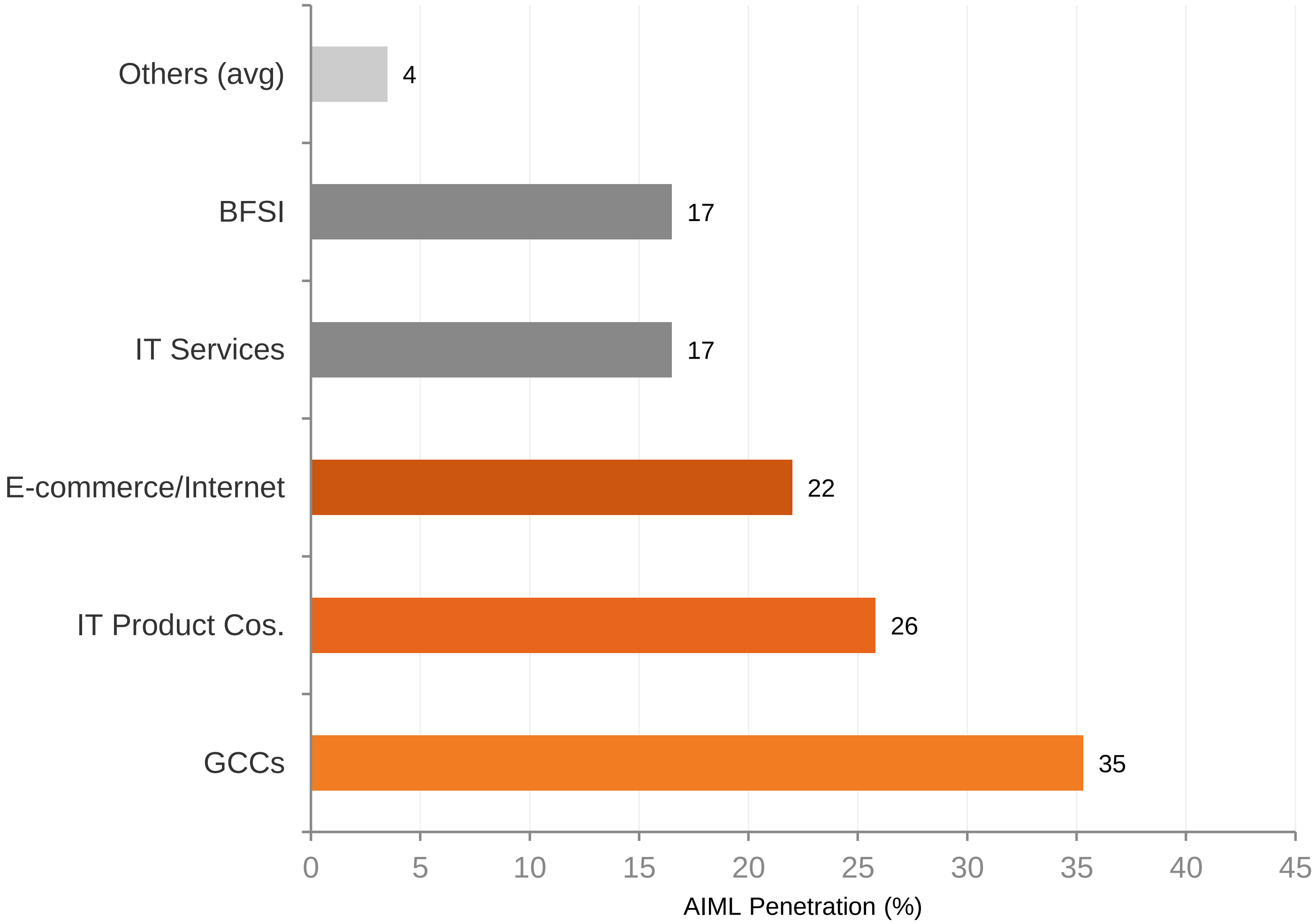
CONCENTRATION METRICS

Concentration Ratio CR3 IT Services + GCCs + IT Product	**67%**
Concentration Ratio CR5 High concentration	**87%**
HHI Score >2,500 = High concentration	**2,578**
HHI Classification Market highly concentrated	**HIGH**
Supply vs Demand BFSI / IT / GCCs dominate demand	**Aligned**

Source: Quess Corp 2025, LinkedIn Talent Insights 2026. HHI = Σ(share²) across 13 industries. CR3/CR5 per corrected industry taxonomy.

INDUSTRY INTENSITY VIEW — AIML PENETRATION (%)

AIML Penetration = AIML Headcount ÷ Total Sector Workforce. High penetration = AI-first or AI-intensive industry.



Industry	Workforce (Mn)	AIML HC	Penetration
GCCs	1.8	635,000	**35.3%**
IT Product Cos.	1.5	386,000	**25.8%**
E-commerce/Internet	1.0	220,000	**22%**
IT Services	5.0	826,000	**16.5%**
BFSI	2.0	330,000	**16.5%**
Others (avg)	Varies	Varies	**3.5%**

KEY INSIGHT

GCCs lead at 35.3% penetration — highest AI intensity globally. IT Product at 25.8% signals product innovation pull. Traditional BFSI & IT Services lag despite large headcount.

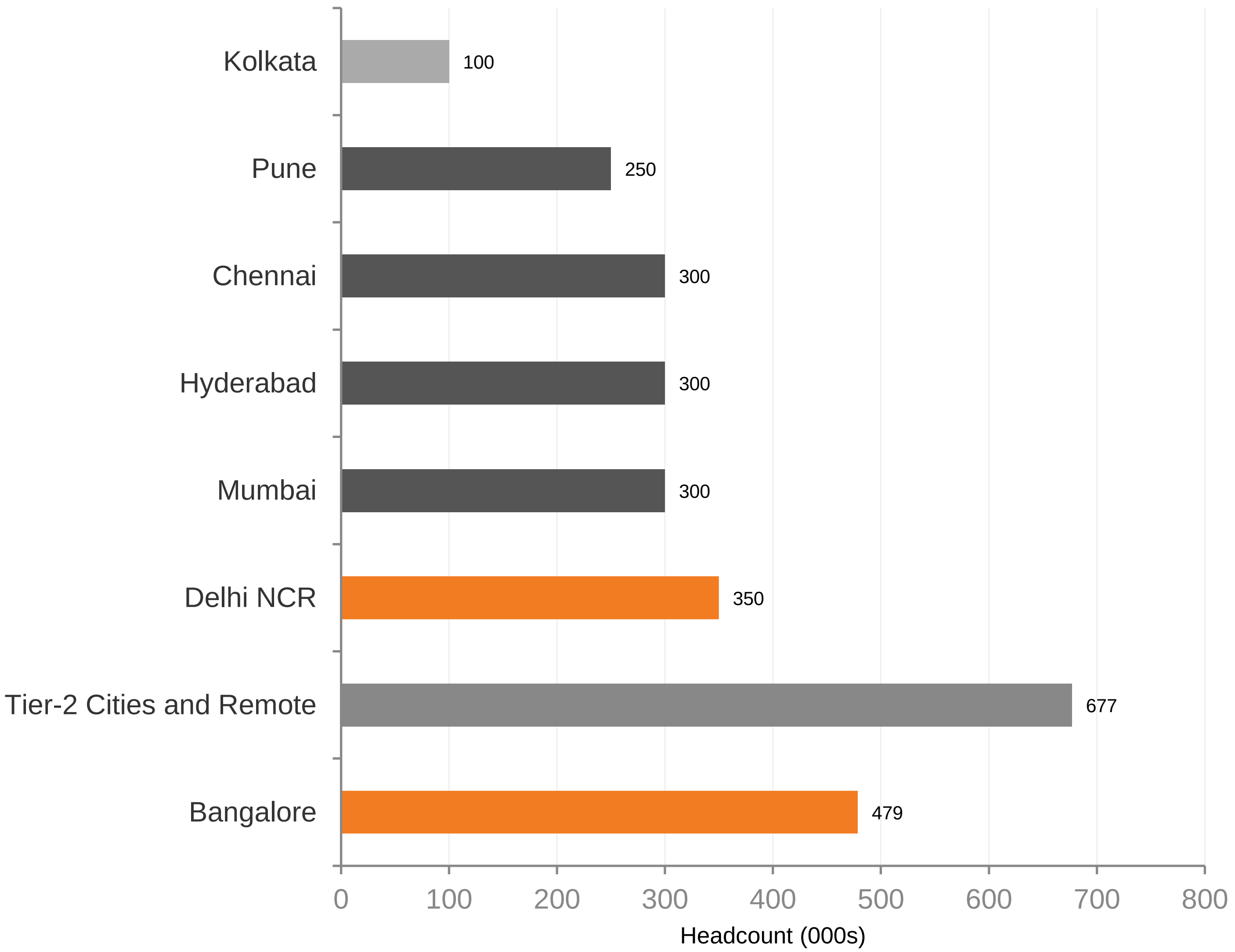
Source: NASSCOM proxy (~5Mn IT workforce), Quess GCC 2026, nareshit.com. Penetration = AIML headcount ÷ sector workforce (Mn).

02

TALENT ARCHITECTURE

City · Role · Experience · Campus Hiring · Talent Gap

CITY-WISE TALENT DISTRIBUTION (2026)



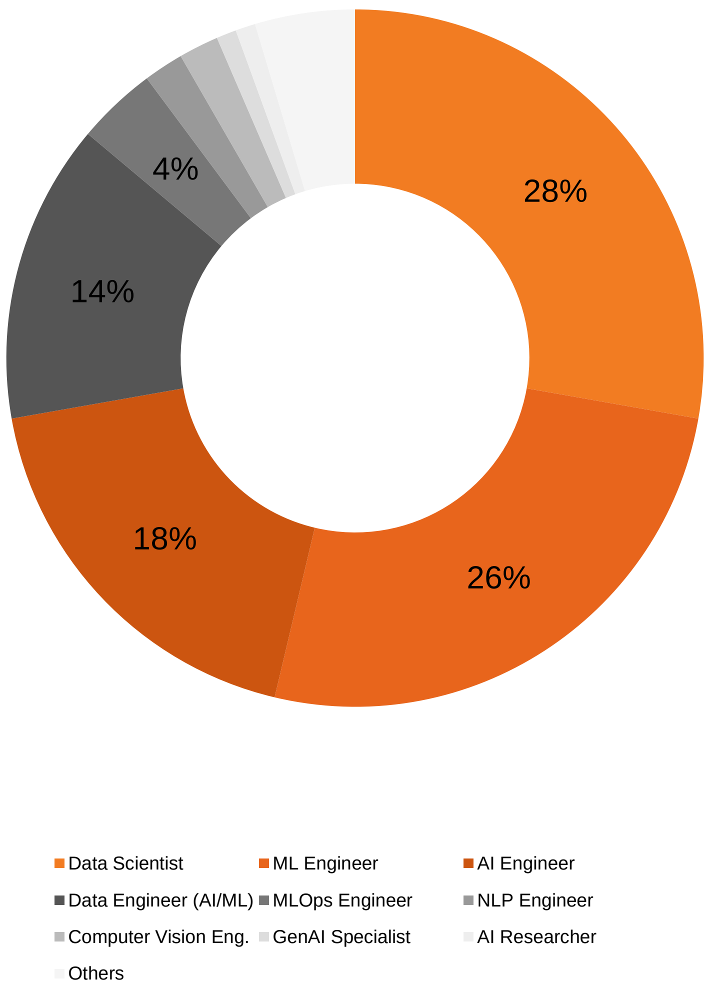
City	Headcount	%
Bangalore	**479,000**	**17%**
Tier-2 Cities (Grouped)	676,911	**25%**
Delhi NCR	350,000	**13%**
Mumbai	300,000	**11%**
Hyderabad	300,000	**11%**
Chennai	300,000	**11%**
Pune	250,000	**9%**
Kolkata	100,000	**4%**

Note: Tier-2 includes Coimbatore (+72% growth), Ahmedabad (+65%), and others. Kolkata estimated from residual allocation.

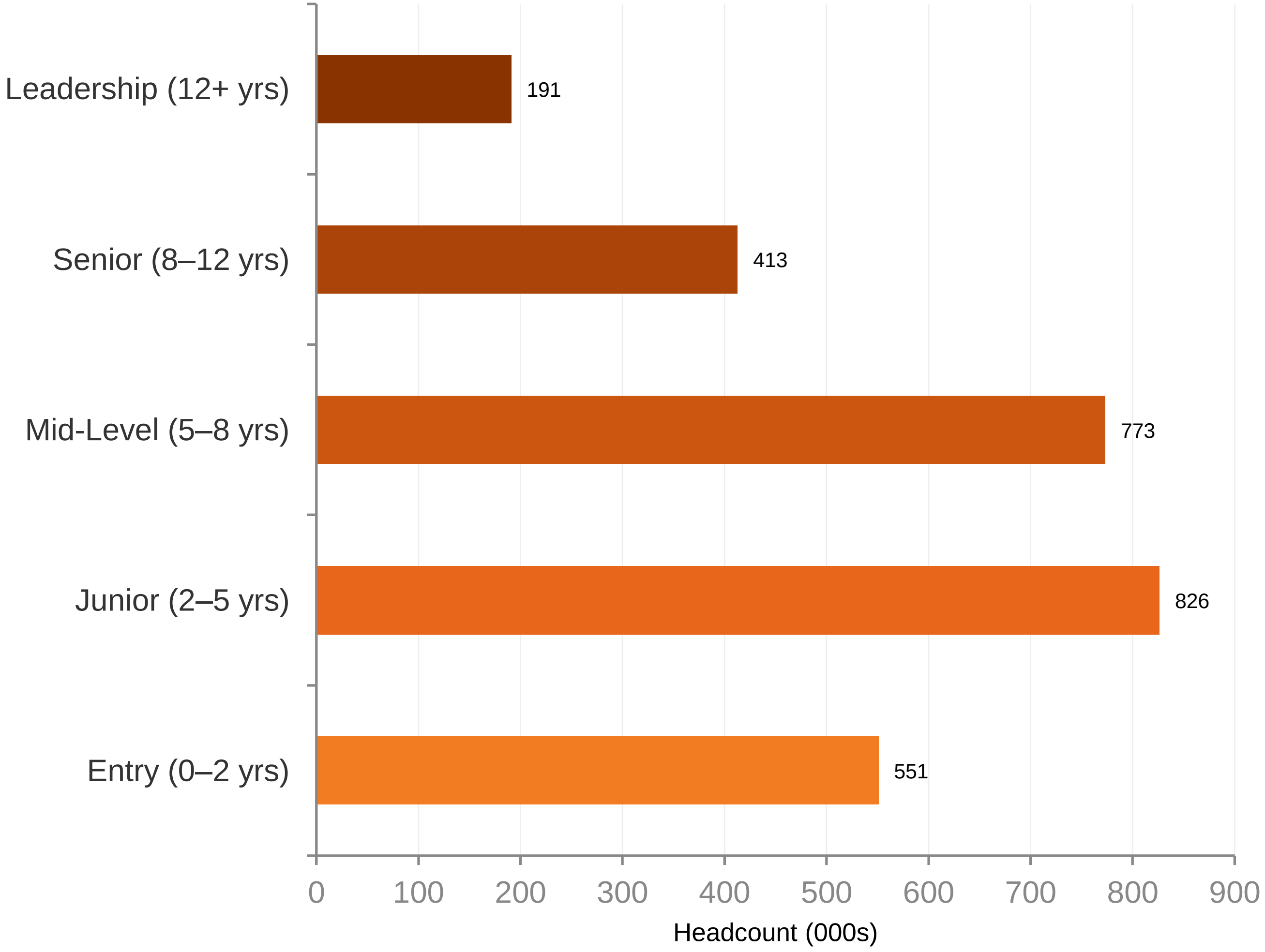
ROLE-WISE TALENT DISTRIBUTION (2026)

Role	Headcount	Share	Key Note
Data Scientist	826,000	30%	Dominant role — highest demand
ML Engineer	773,000	28%	High growth, niche churn risk
AI Engineer	551,000	20%	99% growth in postings
Data Engineer (AI/ML)	413,000	**15%**	Pipeline/infra role
MLOps Engineer	110,000	**4%**	Emerging — 80% talent gap
NLP Engineer	55,000	**2%**	Specialized — 70% gap
Computer Vision Eng.	55,000	**2%**	Specialized — 70% gap
GenAI Specialist	27,000	**1%**	Newest tier — 90% gap
AI Researcher	28,000	**1%**	Niche — most scarce
Others	135,000	**5%**	—

Source: LinkedIn Talent Insights, Quess Corp, growai.in 2025–26. Role definitions per LinkedIn/Quess classifications.

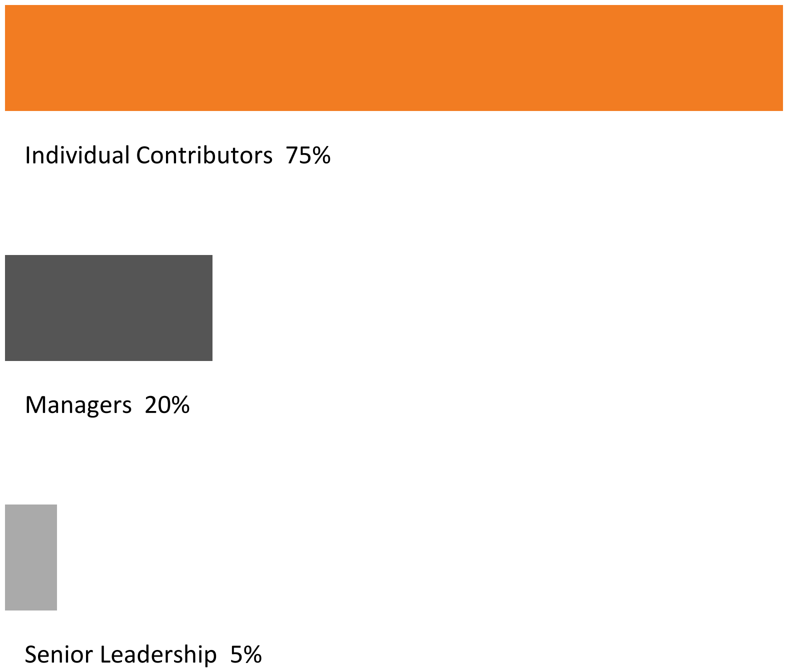


EXPERIENCE DISTRIBUTION & SENIORITY MIX



BOTTOM-HEAVY TALENT PYRAMID

SENIORITY MIX



KEY INSIGHT

50% of talent is entry/junior level. Leadership represents only 7% of pool — creating a critical 'barbell shortage' at the top.

Source: CiteHR, LinkedIn, Quess Corp 2025–26. Experience bands standard; bottom-heavy per intern growth trends (+150% entry postings).

CAMPUS HIRING PIPELINE (2025–26)

25%

Campus Hiring Share

vs 75% lateral hiring

50%

Graduates Industry-Ready

50–55% skill gap remains

₹8–12 LPA

Entry-Level Salary

AIML/Data Science fresher

865K

Cumulative Trained

via EdTech (Coursera etc.)

FEEDER INSTITUTE BREAKDOWN

25% Tier-1 (IITs, IISc, ISI)

Top technical institutes — highest placement quality

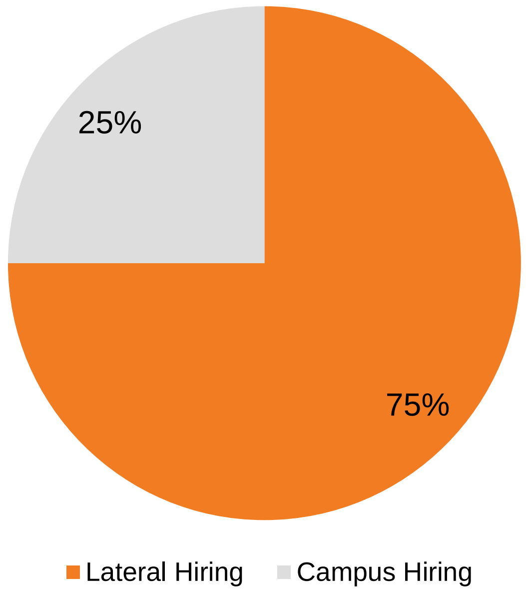
50% Tier-2 (NITs, State Univ.)

Volume supply — core pipeline for industry hiring

25% EdTech / Upskilling

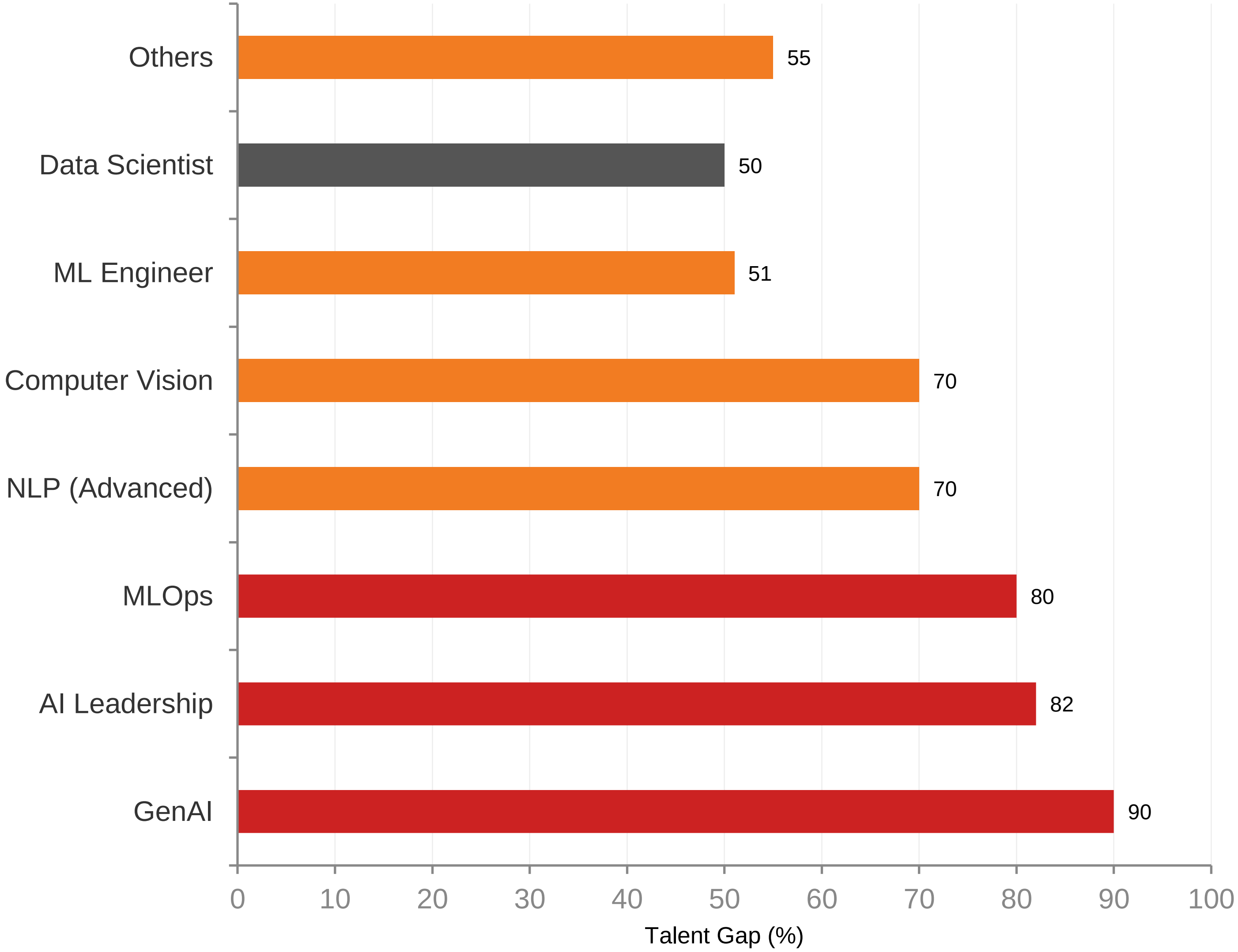
Coursera, UpGrad etc. — 865K trained cumulatively

HIRING MODE



Source: CiteHR, Quess Corp, downtoearth.org 2025–26. Offer acceptance rate: NA.

TALENT GAP ANALYSIS — ROLE / SKILL CLASSIFICATION



CLASSIFICATION FRAMEWORK

LOW — **0–25%**
Supply meets / exceeds demand

MODERATE — **26–50%**
Manageable with targeted hiring

HIGH — **51–75%**
Significant hiring challenges + premiums

CRITICAL — **76%+**
Severe shortage, war for talent

Source: Quess Corp, Manpower Group, analytixlabs.co.in, growai.in 2025–26.

03

COMPENSATION

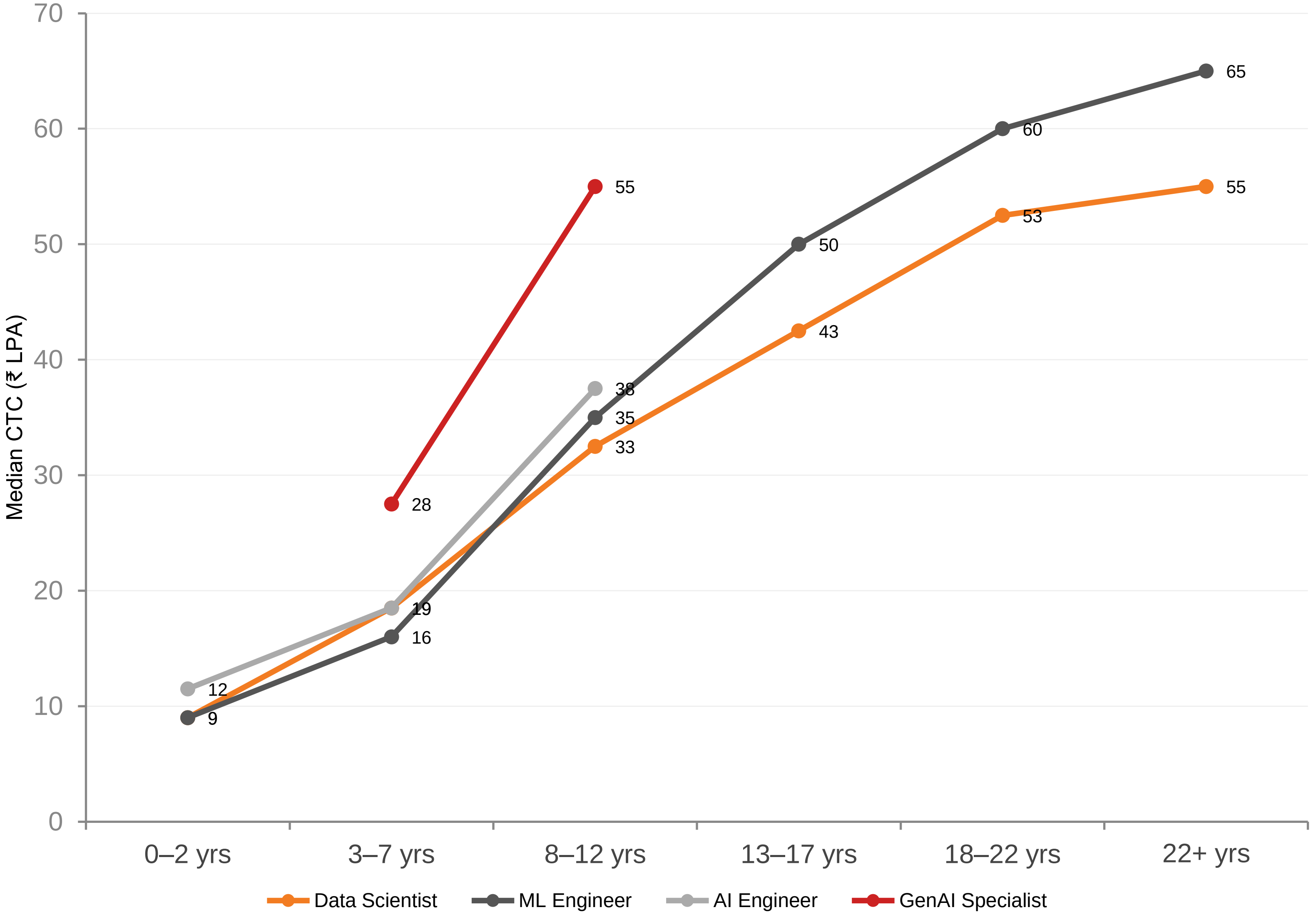
Role × Experience Matrix · Medians · Industry & City Premiums · Skill Premiums

COMPENSATION MATRIX — ROLE × EXPERIENCE (₹ LPA)

Role	0–2 yrs	3–7 yrs	8–12 yrs	13–17 yrs	18–22 yrs	22+ yrs
Data Scientist	₹6–12	₹12–25	₹25–40	₹35–50	₹45–60	₹50+
ML Engineer	₹6–12	₹12–20	₹25–45	₹40–60	₹50–70	₹60+
AI Engineer	₹7–16	₹12–25	₹25–50	NA	NA	NA
Data Engineer (AI/ML)	₹6–10	₹12–18	₹20–35	NA	NA	NA
MLOps Engineer	NA	₹15–25	₹30–45	NA	NA	NA
NLP Engineer	NA	₹16–30	₹30–50	NA	NA	NA
CV Engineer	NA	₹16–30	₹30–50	NA	NA	NA
GenAI Specialist	NA	₹20–35	₹40–70	NA	NA	NA
AI Leadership	—	—	₹50–100	₹70+	₹80+	₹100+

All figures in ₹ LPA (Total CTC), representing 10th–90th percentile ranges. NA = insufficient data for that band. Shaded cells = senior premium tier.

MEDIAN COMPENSATION BY EXPERIENCE BAND (₹ LPA)



KEY MEDIANS SUMMARY

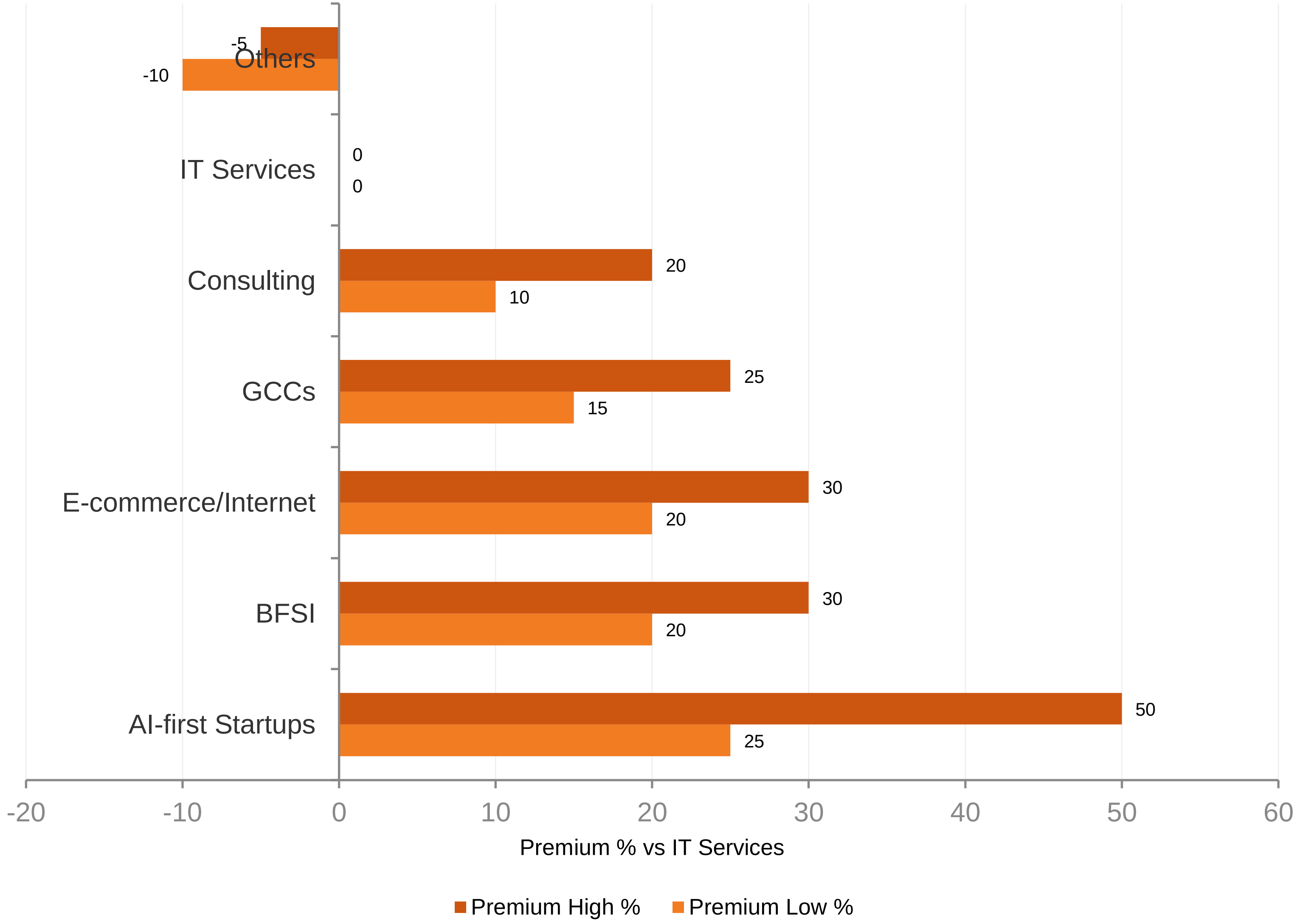
Band	Data Sci.	ML Eng.
0–2 yrs	₹9	₹9
3–7 yrs	₹18.5	₹16
8–12 yrs	₹32.5	₹35
13–17 yrs	₹42.5	₹50
18–22 yrs	₹52.5	₹60
22+ yrs	₹55+	₹65+

METHODOLOGY NOTE

Medians = (Range low + high) / 2. Ranges with 'X+' format use X × 1.1 as proxy. Zero values shown for absent data points.

Source: futurense.com, testleaf.com, analytixlabs.co.in, upgrad.com 2025–26. Total CTC (LPA). 10th–90th percentile.

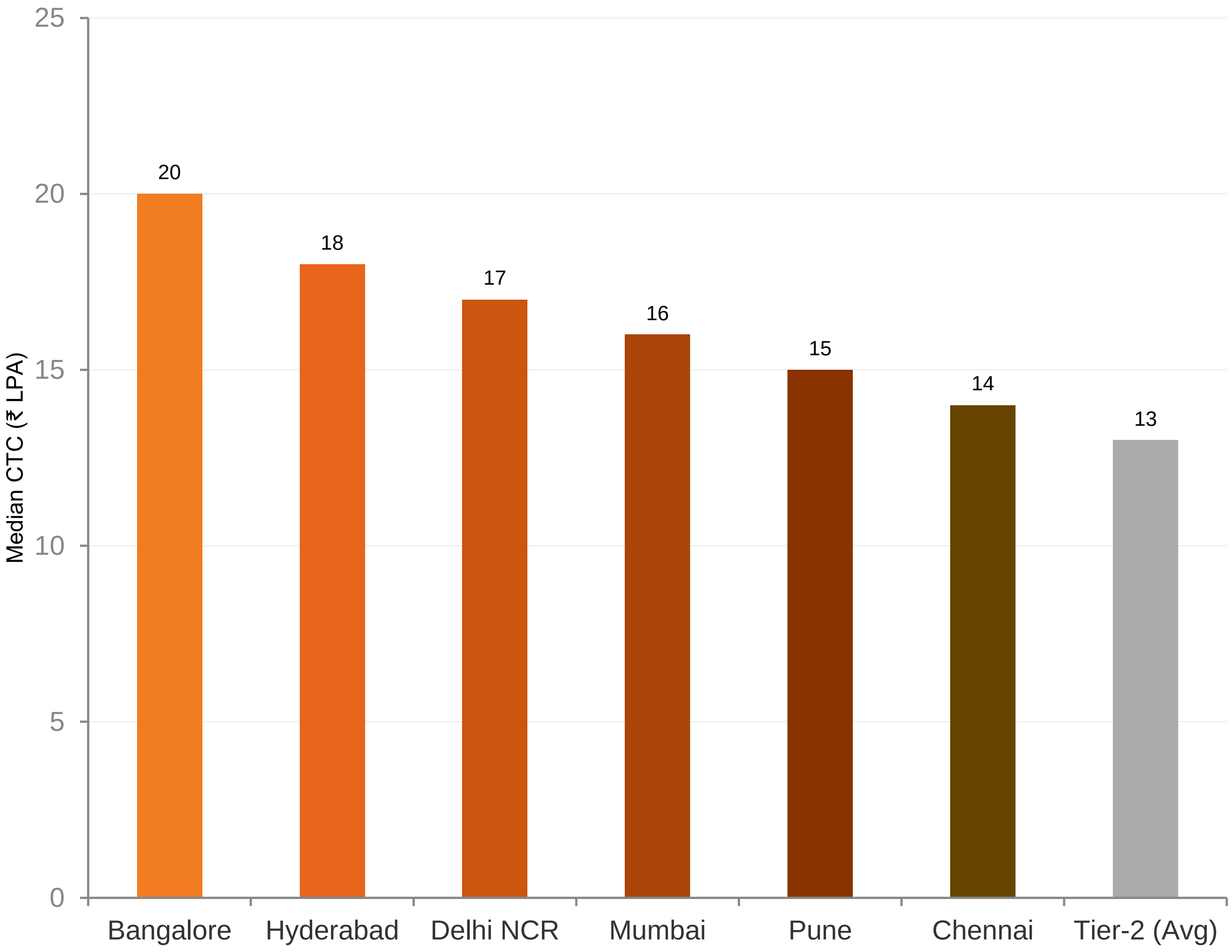
INDUSTRY COMPENSATION PREMIUMS (vs IT Services Baseline)



Industry	Premium	Roles
AI-first Startups	**+25–50%**	GenAI, CV
BFSI	**+20–30%**	GenAI, AI Leadership
E-commerce/Internet	**+20–30%**	ML Eng, Data Eng
GCCs	**+15–25%**	AI/ML Eng, Data Sci
Consulting	**+10–20%**	MLOps, NLP
IT Services	**0% (Baseline)**	All (Baseline)
Others	**+-10–-5%**	Entry-level

Source: LinkedIn, AIM Research, sarkaritel.com, omnivoo.com 2025–26. Premiums are estimated ranges vs IT Services baseline.

CITY-LEVEL COMPENSATION (MEDIAN ₹ LPA)

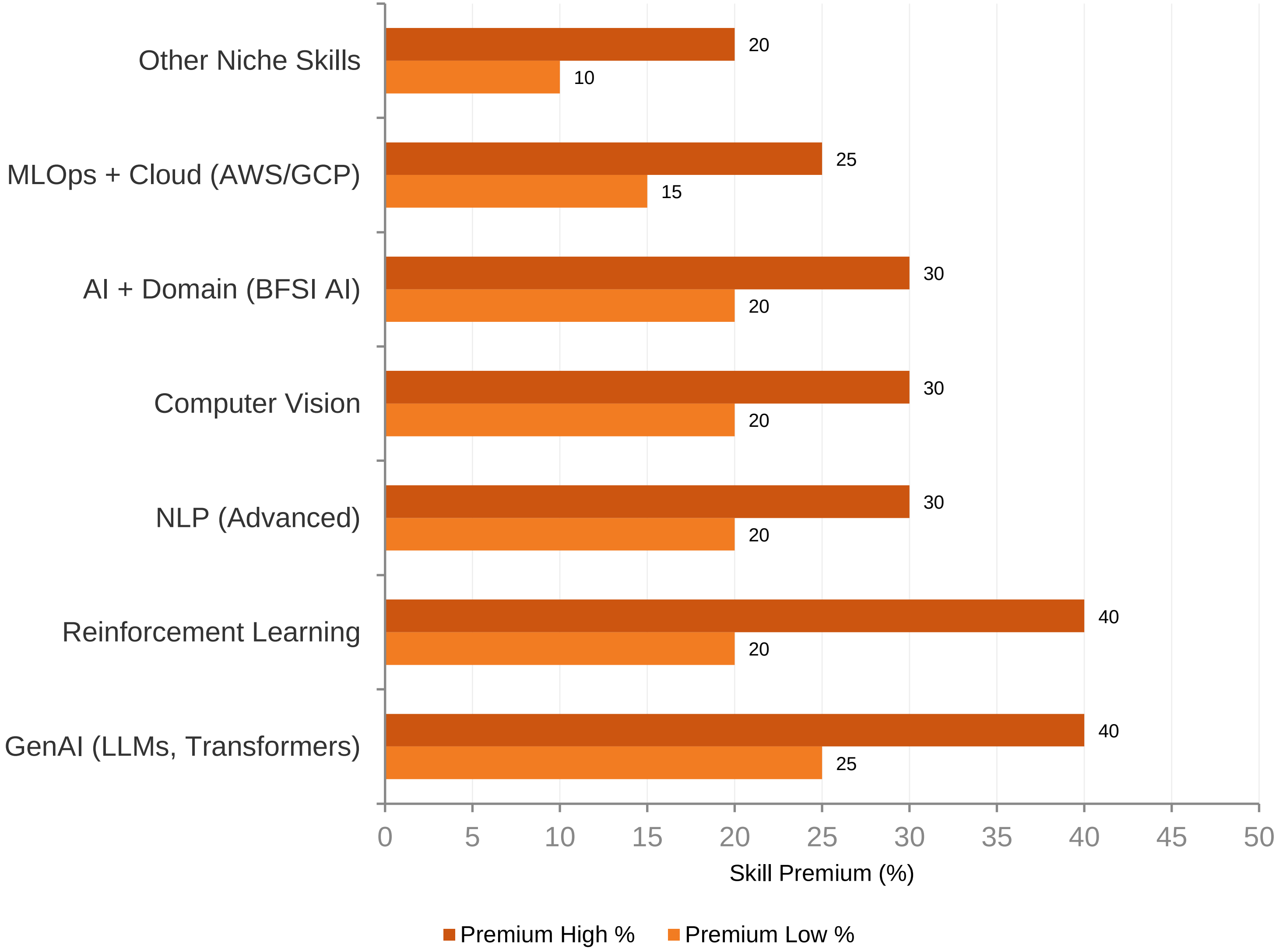


City	Median ₹LPA	vs National Avg
Bangalore	**₹20**	+25%
Hyderabad	**₹18**	+20%
Delhi NCR	**₹17**	+15%
Mumbai	**₹16**	+10%
Pune	**₹15**	+5%
Chennai	**₹14**	0% (Base)
Tier-2 (Avg)	**₹13**	-10 to -20%

National Average baseline: ~₹14 LPA (mid-level AI/Data Science aggregate).
Kolkata: insufficient data.

Source: scaler.com, upgrad.com 2025–26. Medians for AI Engineer role used as city baseline. Kolkata: NA.

SKILL PREMIUMS (% ABOVE MARKET MEDIAN)



Skill	Role	Premium
GenAI (LLMs, Transformers)	Data Scientist	**+25–40%**
Reinforcement Learning	ML Engineer	**+20–40%**
NLP (Advanced)	NLP Engineer	**+20–30%**
Computer Vision	CV Engineer	**+20–30%**
AI + Domain (BFSI AI)	AI Engineer	**+20–30%**
MLOps + Cloud (AWS/GCP)	MLOps Engineer	**+15–25%**
Other Niche Skills	Various	**+10–20%**

Source: futurense.com, analytixlabs.co.in, omnivoo.com 2025–26. Premiums are over market median; certifications (AWS/GCP/Azure) further boost MLOps by ~5%.

04

WORKFORCE BEHAVIOUR

Attrition trends · Switching intent · Role & industry breakdown

ATTRITION ANALYSIS — INDIA AIML/DATA SCIENCE (2026)

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15–25%

AIML Avg. Attrition

GenAI/LLM: 31–40%

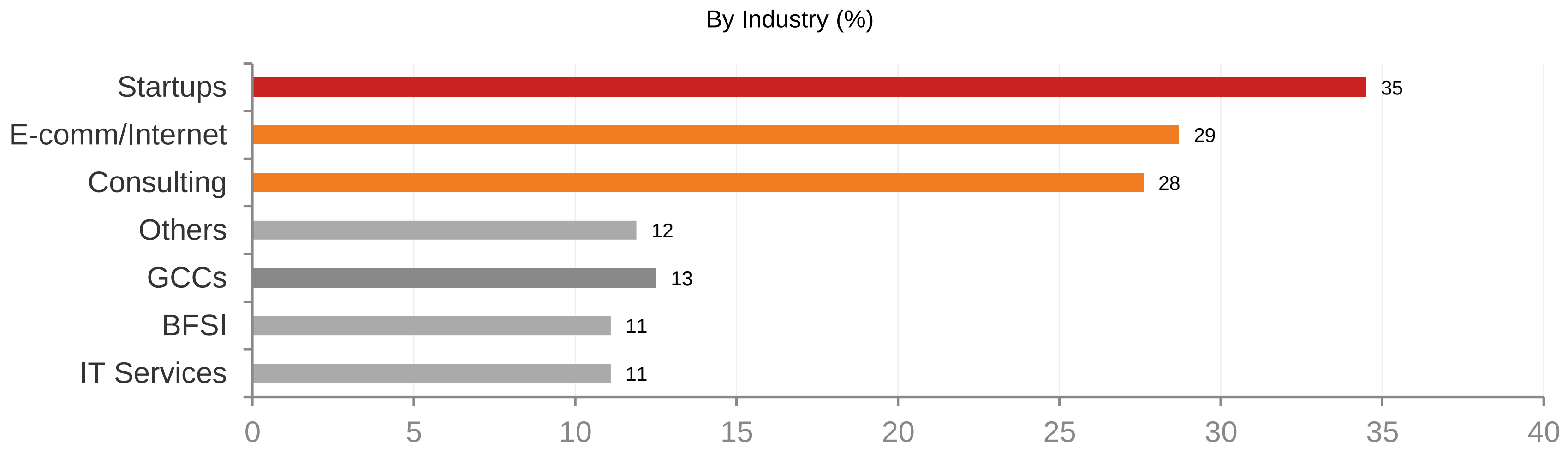
(ML Eng · AI Eng · GenAI)

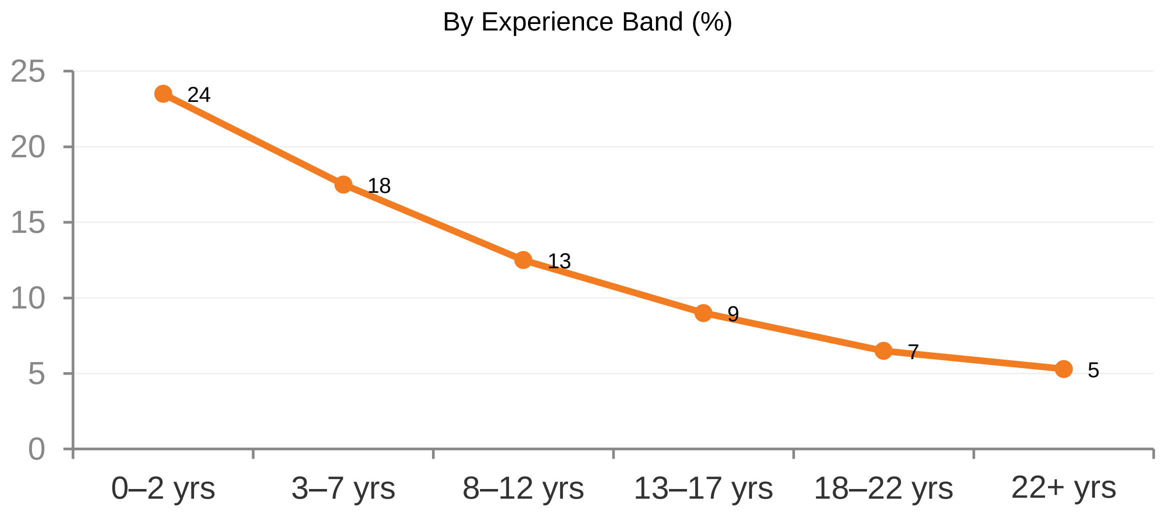
5–12%

Data Science Attrition

Stable in enterprise

(Data Sci · Solutions Arch.)





BY ROLE

Role	Attrition	Status
Data Scientist	**5–12%**	Stable
ML Engineer	**15–20%**	High
AI Engineer	**15–20%**	High
MLOps Engineer	**15–25%**	High
GenAI Roles	**21–45%**	Critical

Source: AIM Research 2026 (direct), Wisemonk, talentnauts.com. E-comm/Startups: proxy from overall industry attrition.

JOB SWITCHING INTENT — ROLE & INDUSTRY BREAKDOWN

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~40%

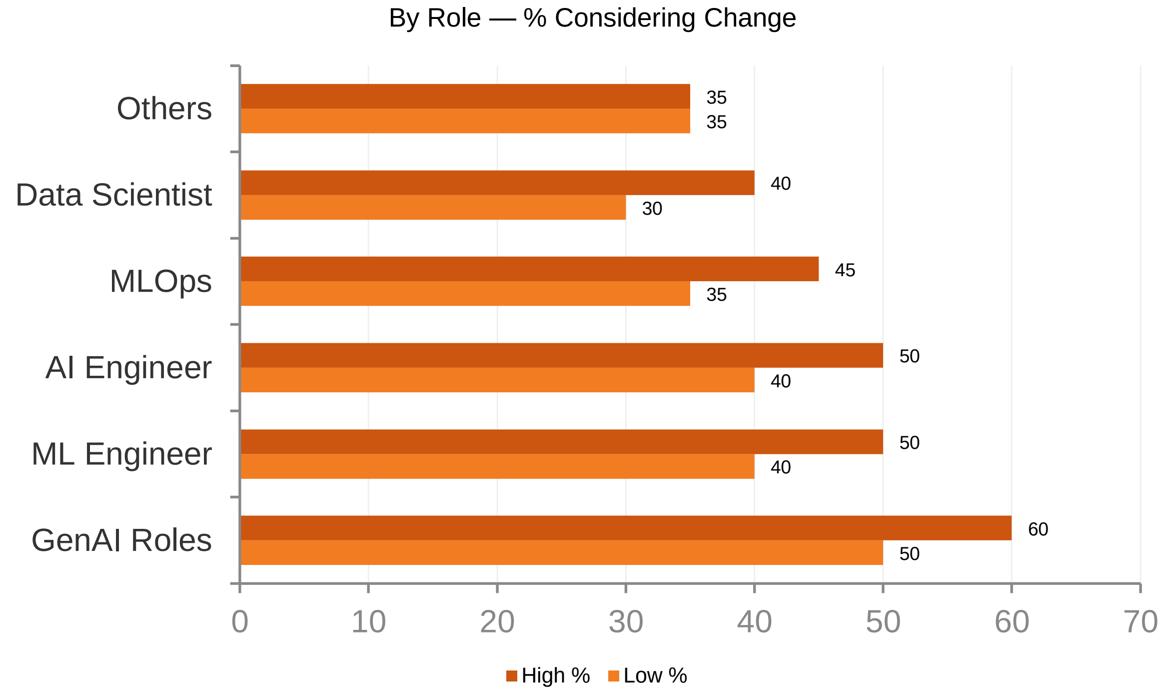
Actively Seeking Change

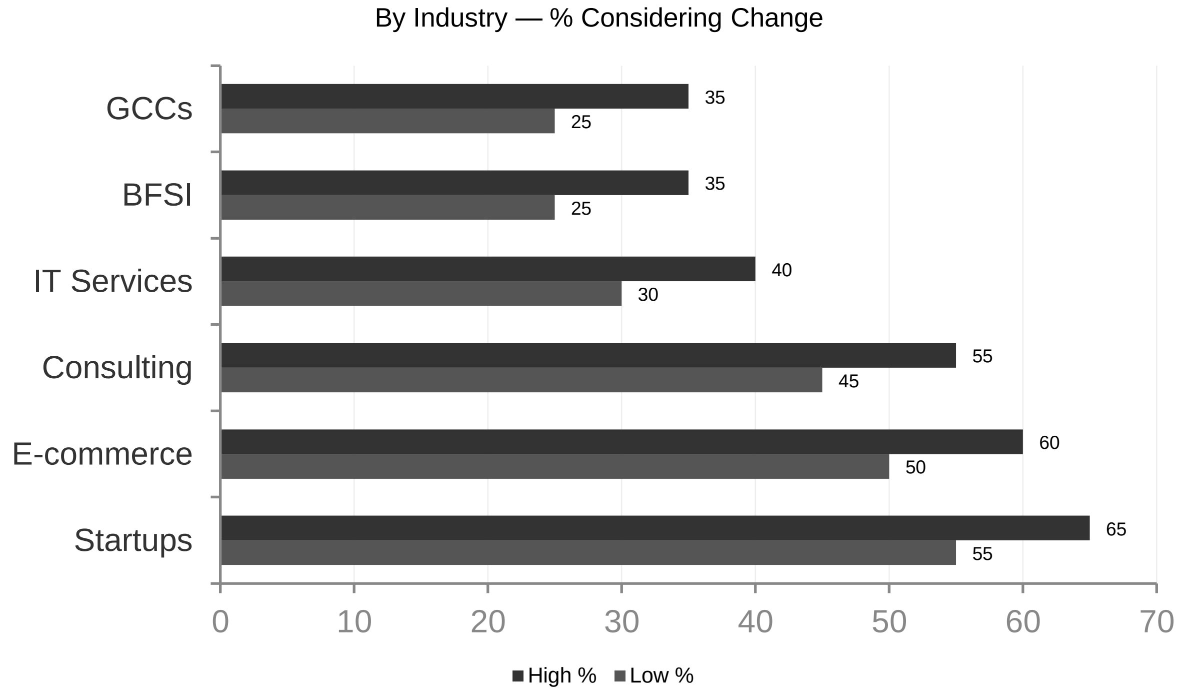
2026 AIML professionals

74–84%

Passively Open

Open to opportunities (LinkedIn 2026)





Source: LinkedIn 2026, AIM Research, Wisemonk. Active intent ~40%; passive 74–84%. Role/industry estimates scaled from attrition volatility.

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