

EPISODE 7

When India's Corporate Engine Accelerates Who Keeps Up?

Inputs / What firms invest

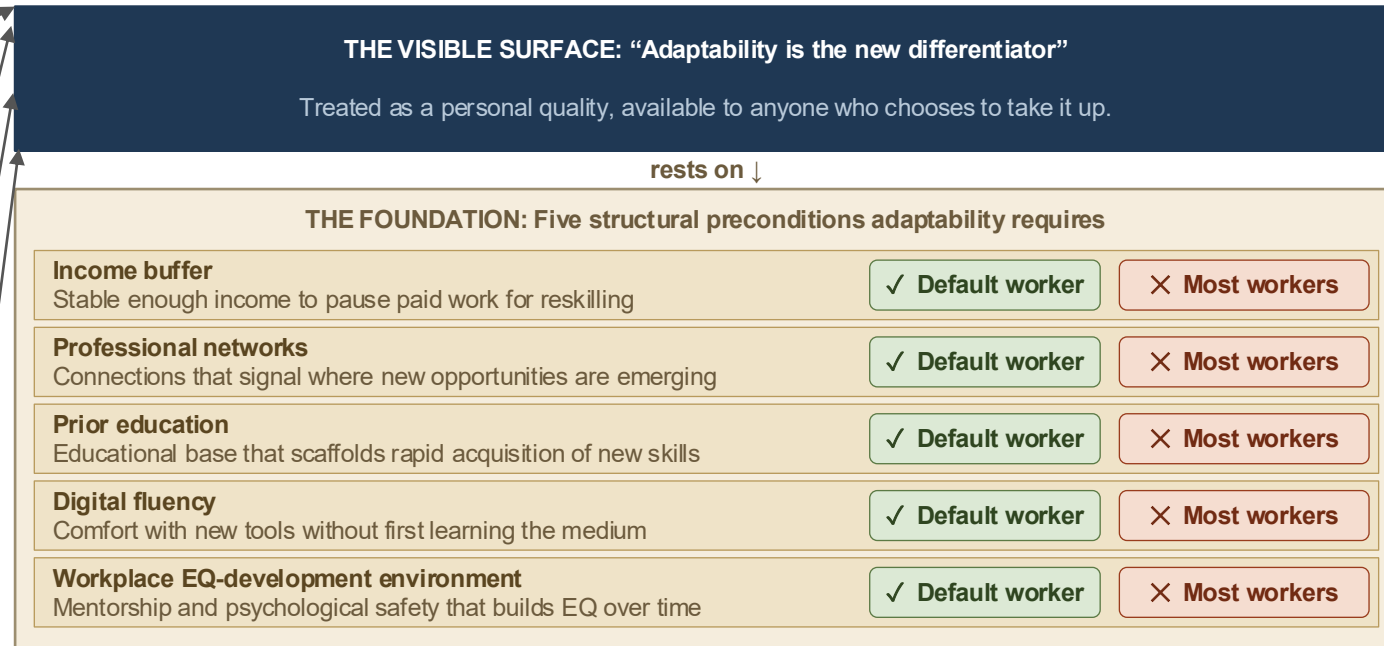
Capital investment
AI tools, infrastructure

Data infrastructure
GST data, analytics platforms

Regulatory frameworks
GST formalization, compliance

AI and automation
Tools replacing manual work

CORPORATE AI ADOPTION: What looks like adaptability rests on a foundation that is not distributed evenly



Whose interests it serves

Large firms, digitally fluent professionals
The workers already positioned to be “adaptable.”

Outputs

Efficiency

Speed of execution

Scale of operation

Shareholder return

Adaptability is not a personal quality. It is a product of accumulated advantage. The system rewards what the foundation already distributed.

Excluded: three populations, three different mechanisms

Entry-level workers

Where careers used to begin

The work that taught junior accountants and consultants by doing has been absorbed into AI tools. The training pathway is gone before any replacement was built. Deep expertise becomes a privilege of firms that choose to invest in it.

Workers without reskilling support

Treated as natural casualties of the transformation

No income buffer to pause work, no networks to surface alternatives, no educational base to learn quickly. Uday’s frame: they will probably wilt away, and that is fine. The framing dissolves the accountability the condition produces.

Informal economy

Outside the GST formalization that opens the new credit pipeline

Capital democratization through GST-linked trade finance reaches businesses inside the GST system. Most of India’s small enterprises are not. The democratization Uday describes runs along a track most of the economy is not on.