



NITI Aayog

# NITIसंधान

Quarterly newsletter by Research and Networking (R&amp;N) Division of NITI Aayog



## Message from Vice Chairperson

India's onward journey towards *Viksit Bharat@2047* will be shaped not merely by the scale of its ambitions, but by the quality of the ideas, institutions and evidence that inform them. At a time when economic certainties are being recast by shifting trade patterns, technological change and new imperatives of sustainability and inclusion,

sound policy must remain both empirically grounded and alive to the possibilities of the future.

This edition of NITIसंधान reflects the breadth of this endeavour. From the *Trade Watch – Quarterly*, which brings a sharper lens to India's evolving engagement with the global economy, to the India Electric Mobility Index (IEMI) 2025, the second edition of an effort to benchmark and deepen the States and Union Territories' transition towards electric mobility, the research featured here addresses questions of immediate relevance and enduring consequence.

Yet these are but part of a wider intellectual enterprise – one that encompasses the future of work and skilling, manufacturing competitiveness, professional services and the care economy. Together, these studies embody NITI Aayog's continuing endeavour to place evidence at the heart of policy, foresight at the service of action, and knowledge in the pursuit of a more competitive, inclusive and resilient India.

**Shri Ashok Kumar Lahiri**  
Vice Chairperson, NITI Aayog



## From the Desk of the CEO

A nation's development is ultimately reflected in the opportunities it creates, the capabilities it nurtures, and the institutions it strengthens. As India pursues its long-term development goals, these priorities are increasingly interconnected across skills, manufacturing, services, technology and livelihoods.

This edition of NITIसंधान brings together research that engages with these transitions. Reimagining Skilling for *Viksit Bharat@2047* explores a more flexible and demand-driven skilling ecosystem, while Key Sectors to Position India as a Global Manufacturing Hub identifies pathways to deepen value chains and strengthen India's global competitiveness.

The study on India's Services Sector examines regulatory reforms that can strengthen professional services and expand their global potential. Research on care, alongside work on trade and electric mobility, further reflects the breadth of India's evolving policy priorities.

Together, these studies demonstrate the importance of rigorous research in translating evidence into meaningful policy action, advancing India's economic and social transformation, and contributing to the realisation of *Viksit Bharat @2047*.

**Shri Anurag Jain**  
CEO, NITI Aayog

## About Research and Networking (R&N) Division

The R&N Division seeks to position NITI Aayog as a leading facilitator of high-impact, policy-relevant research and a catalyst for strategic partnerships. It develops a robust pipeline of research studies, advances effective dissemination strategies, and fosters collaboration among diverse stakeholders within India's policy research ecosystem to strengthen evidence-based policymaking and knowledge exchange.

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## NITI Spotlight: Ideas, Impact, Insights



From national trends to block-level realities, the NITI for States platform brings data closer to decision-makers. Its Data Profiles enable States, districts and blocks to assess performance, identify gaps, benchmark progress and learn from peers – strengthening evidence-based planning and advancing the vision of *Viksit Bharat*. Access using QR provided.



## Research Publications This Quarter

- Trade Watch – Quarterly (April–June [Q1] FY27)
- India Electric Mobility Index (IEMI) 2025
- Reimagining Skilling for *Viksit Bharat@2047*
- Key Sectors to Position India as a Global Manufacturing Hub
- India's Services Sector: Insights on Regulatory Regime in Professional Services
- Reimagining Care: Strategies for Empowering Caregivers in *Viksit Bharat@2047*



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# Voice of Our Researchers



**Shri K.S. Rejimon**

Programme Director, Social  
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## Reimagining Care: Strategies for Empowering Caregivers in Viksit Bharat@2047

India is undergoing a significant demographic transition, with the elderly population estimated at 149 million in July 2022 and projected to reach 194 million by 2031 and 347 million by 2050, accounting for 20.8% of the population. Increasing longevity, changing family structures and migration for employment are expected to generate sustained demand for caregiving and allied services. The evolving care requirement therefore has implications for health, social protection, livelihoods and service delivery.

Against this backdrop, caregiving is emerging as an important component of India's social infrastructure and services economy. The Union Budget 2026–27 has provided a policy platform for developing a Care Ecosystem covering geriatric and allied care and NSQF-aligned programmes for training 1.5 lakh multi-skilled caregivers, linking demographic demand with skilling, employment and the growth of the care economy.

### India's elderly population (aged 60 years and above)

**149 million**  
(10.5% of population)



2022

**194 million**  
(projected)



2031

**347 million**  
(20.8% of population)



2050

### Family caregivers in India



of India's population  
are family caregivers

### Global shortage of health and care workers



**11 million**

estimated global shortage  
by 2030, including doctors,  
nurses, midwives, other health  
professionals and personal  
care workers  
(WHO, 2025)

### Why the demand for caregivers is increasing in India



Increasing  
female labour  
force participation



Urbanisation



Migration of  
younger family  
members



Shift from joint  
to nuclear  
families

### What this means



The demand for long-term care and caregiving services will increase substantially in India, requiring a skilled and professional caregiver workforce, with standardised training, certification, quality assurance and an enabling ecosystem.

Care Economy in India: Demographic Shifts and Growing Caregiver Demand

### Major Recommendations

- **Institutional architecture:** Establishment of a National Caregiving Council as the apex institution for regulating, coordinating and promoting the caregiving ecosystem, with convergence among relevant stakeholders.
- **Skills and professionalisation:** A National Caregiving Qualification Framework to standardise education, competency-based training, accreditation and certification, supported by accredited regional centres, quality benchmarks, trainer capacity-building and periodic assessment of demand and supply.
- **Digital workforce systems:** A National Caregiver Registry and Digital Portal for registration and verification, matching caregivers with care seekers, digital learning, monitoring, grievance redressal and service delivery.
- **Care quality and specialised capacity:** Specialised training for geriatric, disability, dementia, palliative, mental health and long-term care, with defined career pathways and stronger quality assurance.
- **Social protection and community care:** Strengthened welfare and social protection for caregivers, alongside greater support for family and community caregivers and integrated community-based care.
- **Technology and enterprise:** Technology-enabled care, assistive technologies and digital platforms, together with opportunities for MSMEs, entrepreneurship, CSR and private investment across home-based care, assisted living, training and specialised services.
- **Women and international mobility:** Greater formalisation of care work to support women's employment and entrepreneurship, alongside standardised qualifications, language training and international partnerships to build a globally competitive caregiving workforce.

### Policy Relevance

The report positions caregiving as an employment-intensive segment of the services sector with potential to strengthen social infrastructure, women's economic participation, international workforce mobility, and home and community-based care. Together, the proposed measures seek to strengthen the quality, accessibility and sustainability of care while preparing India for emerging domestic and global care needs.



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report

## Trade Watch - Quarterly (April–June [Q1] FY27)

### Economics and Finance - I Division

Global trade remained resilient in the first half of calendar year 2026, with goods trade reaching approximately US\$13.7 trillion, up 12.5% y-o-y, while services trade grew by 10.5%. Geopolitical uncertainty continued to drive the reconfiguration of global supply chains and trading relationships, resulting in shifts in bilateral trade patterns and greater diversification of trading partners.

India's merchandise and services trade performance recorded a 15.5% y-o-y increase during April–June 2026, supported by growth in both exports and imports. During this period, total trade reached US\$506.9 bn, up from US\$438.9 bn in the same period last year. In the current period, exports grew 13.0% to US\$236.2 bn, while imports grew 17.8% to US\$270.6 bn between April–June 2026.



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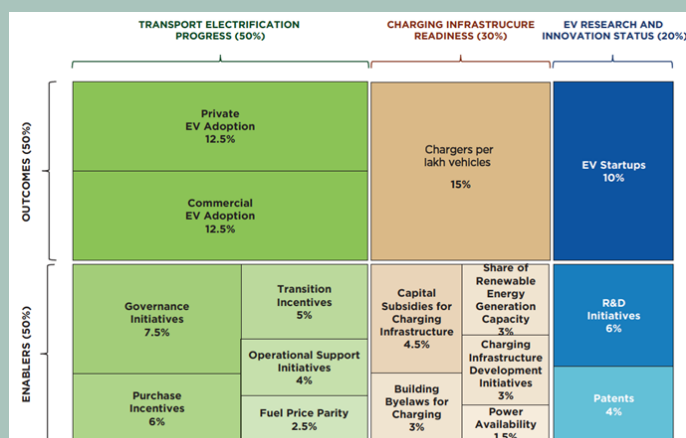
Source: Department of Commerce, MoC&I, GOI

Total Trade performance between April–June 2026

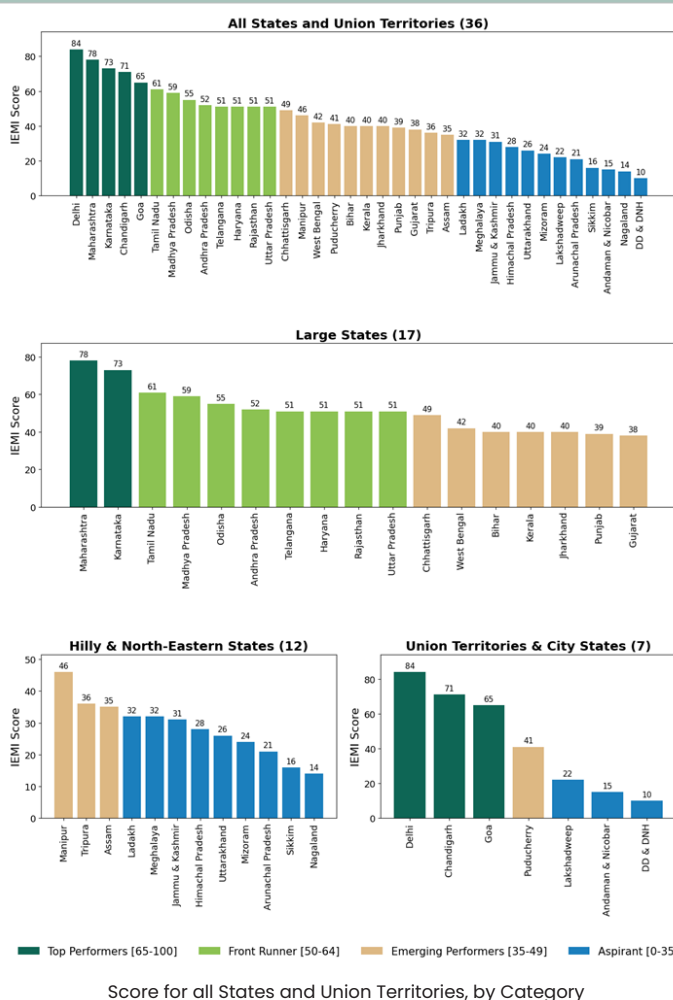
## India Electric Mobility Index (IEMI) 2025

### E-Mobility Division

The India Electric Mobility Index (IEMI) 2025 is the second edition of the Index developed to assess the progress of States and Union Territories (UTs) in the transition towards electric mobility. The Index tracks both the policy framework and implementation outcomes for the year 2025, providing a common framework for benchmarking performance, identifying areas for improvement, facilitating peer learning and supporting evidence-based policymaking. The three themes and 16 indicators of the IEMI, along with their weightages, are indicated in the diagram.



Theme and Indicator Weightages. EV: electric vehicle; R&D: research and development



The methodology was refined based on feedback from States and UTs, with peer grouping into 17 Large States, 12 Hilly & Northeastern States, and 7 UTs & City States, alongside expanded data points, improved data sources, and enhanced normalisation.

Based on overall scores, States and UTs are classified into four performance categories: Top Performers (65 and above), Front Runners (50–64), Emerging Performers (35–49), and Aspirants (below 35). Delhi (84), Maharashtra (78), Karnataka (73), Chandigarh (71) and Goa (65) are classified as Top Performers. Among the Large States, Maharashtra and Karnataka recorded the highest scores, while Manipur (46) recorded the highest score among Hilly and Northeastern States. Among UTs and City States, Delhi, Chandigarh and Goa recorded the highest scores. Madhya Pradesh recorded the highest improvement in rank, moving from 23rd in IEMI 2024 to 7th in IEMI 2025.

The report provides detailed State and UT profiles and serves as a reference for policymakers to benchmark performance, identify priority areas and strengthen implementation towards a cleaner, more inclusive and sustainable mobility ecosystem.

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## Reimagining Skilling for Viksit Bharat@2047

### Skill Development, Labour & Employment Division

India's ambition to emerge as a developed nation by 2047 rests fundamentally on the capabilities, adaptability and aspirations of its people. Against the backdrop of rapid technological change, evolving industry requirements, artificial intelligence, automation, the green transition and shifting global value chains, this report presents a comprehensive roadmap for transforming India's skilling ecosystem.

The report moves beyond viewing skilling as a standalone intervention and instead positions it as an integrated, lifelong journey spanning education, training, employment and entrepreneurship. It examines the diverse needs of learners and workers and identifies persistent barriers related to access, information, financing, learning models, industry alignment and system governance.

At the heart of the report is a Reimagined Skilling Architecture, anchored in five strategic reforms and four system enablers. These include integrating employability and vocational exposure into schools; strengthening industry-backed, outcome-linked programmes; embedding apprenticeships and work-integrated learning; and enhancing career guidance to enable informed choices. Complementing these reforms are a Digital Skills Passport, outcome-based financing, greater adoption of the National Credit Framework (NCF), and skills-first policies and infrastructure.



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### System Enablers



### Core Reforms



The proposed architecture is guided by three principles: non-linear learning pathways, skilling as a lifelong process, and outcomes centred on employability, progression and livelihoods. By enabling individuals to move more flexibly between education, skilling and work, the report seeks to create a more responsive, inclusive and future-ready workforce, strengthening India's human capital and supporting the broader vision of Viksit Bharat@2047.

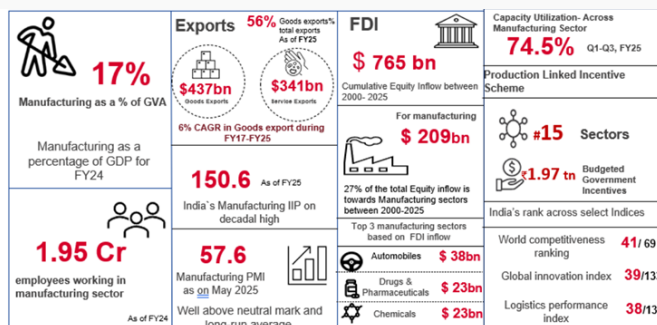
## Key Sectors to Position India as a Global Manufacturing Hub

### Industry & Foreign Investment Division

As India advances towards the vision of Viksit Bharat@2047, strengthening manufacturing competitiveness will be central to expanding investment, exports, employment and participation in global value chains. The report presents an evidence-based roadmap for identifying and developing sectors with the potential to strengthen India's position in global manufacturing.



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### An Overview of Manufacturing in India

The study adopts a structured four-phase methodology, beginning with an assessment of 62 manufacturing sectors based on domestic and global market size and growth prospects up to FY30. This analysis shortlisted 12 sectors: Automobiles, Chemicals, Capital Goods, Electronics, Pharmaceuticals, Defence & Drones, Food Processing, Textiles, Steel, Leather & Footwear, Telecom Equipment, and Solar PV Manufacturing. These sectors were subsequently assessed through the lenses of strategic alignment, operational and financial viability, and value-chain positioning, and benchmarked against leading manufacturing nations.

The first volume focuses on Chemicals, Textiles, Solar PV Manufacturing, and Telecom & Networking Products – sectors that together represent a diverse mix of export-oriented, technology-intensive and employment-focused opportunities. The report examines their market potential, raw material dependencies, technology readiness, competitiveness and value-chain opportunities, while identifying sector-specific constraints and targeted interventions.

At its core, the report emphasises that India's manufacturing ambitions must extend beyond expanding production to moving up the value chain, building globally competitive enterprises, strengthening advanced manufacturing capabilities, and deepening integration with global production networks. It seeks to translate this ambition into actionable, sector-specific strategies that can enhance competitiveness, generate employment and support India's emergence as a globally integrated manufacturing hub.

## India's Services Sector: Insights on Regulatory Regime in Professional Services

### Services and Economic Intelligence Unit

The report offers a comprehensive assessment of the regulatory architecture governing India's legal, accounting, architectural, engineering and healthcare professions. It examines these sectors through three dimensions: professional regulation, competency and licensing requirements, and restrictions governing market access and service delivery.

Its analysis identifies persistent structural challenges, including fragmented regulatory oversight, restrictions on foreign participation, rigid rules governing organisational forms, and barriers to interstate and cross-border mobility. The report also highlights gaps such as the limited legal recognition of in-house counsel, the absence of comprehensive statutory frameworks for engineering and bookkeeping, and constraints affecting multidisciplinary professional practices. Looking ahead, NITI Aayog proposes a four-pronged strategy centred on continuous professional development, regulatory transparency, value-chain enhancement and adoption of emerging technologies, particularly AI. Key reforms include pursuing Mutual Recognition Agreements, enabling multidisciplinary practices, recognising diverse legal professionals beyond advocates, and harmonising governance across the healthcare sector.

By addressing these regulatory frictions, India can strengthen domestic professional services, enhance global competitiveness, expand services exports and facilitate more effective trade negotiations. The report positions regulatory modernisation as an important component of India's broader ambition to build a high-productivity, globally integrated professional-services ecosystem aligned with the vision of Viksit Bharat@2047.



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### Four-pronged Strategy

Continuous Professional Development for Professionals

Adoption of best practices in professional services

Elevate professional services within the services value chain

Advance the emerging trends in professional services