

Anatomy of a Third Force: The AI Stack, Digital Labor, and the India-Europe Corridor

The infrastructure for AI-driven work exists. The question is who controls the stack.

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Executive Summary

Work is being unbundled from humans and reassembled as infrastructure. In 2025, enterprises invested €31.4B in generative AI, yet 95% of surveyed organizations report no measurable P&L impact. The gap between spending and outcomes defines the current moment.

This paper introduces a seven-layer model of the full AI stack—from energy and compute through data, models, orchestration, agents, and governance—and maps the chokepoints that determine who controls digital labor at scale.

India and Europe emerge as the most complementary corridor in global AI. India brings scale, speed, and proven digital public infrastructure at population level. Europe brings the world's first comprehensive AI regulation, research capital at scale, and irreplaceable semiconductor chokepoints through ASML's EUV monopoly.

Yet this corridor's potential remains overwhelmingly untapped. Cumulative private AI investment in India (€9.57B) is a fraction of the US (€399B) and China (€101B). What is missing is not institutional goodwill but operational connective tissue: the platforms and protocols that make cross-border collaboration frictionless.

The third force in global AI will not be built by outspending the superpowers, but by out-connecting them.

Key Takeaways

- AI is turning work into an infrastructure layer you can buy as an operational service, but most enterprises still struggle to measure real impact.
- Geopolitics follows architecture: the full AI stack is seven layers deep, and each layer has different chokepoints and leverage.
- India and Europe are unusually complementary across those layers, but a credible “third force” needs an operating layer that makes cross-border collaboration frictionless.

Anatomy of a Third Force: The AI Stack, Digital Labor, and the India-Europe Corridor

The infrastructure for AI-driven work exists. The question is who controls the stack.

The €31.4B Experiment That Mostly Isn't Working

Digital labor is no longer theoretical. In 2025, enterprises spent [€31.4B on generative AI](#), up [3.2x year-over-year](#). The results are arriving in forms that feel less like software upgrades and more like new hires. Salesforce says Agentforce [ARR reached €677M](#) in Q4 FY2026 ([+169% year-over-year](#)), with [29,000 Agentforce deals closed](#), branding Agentforce as [“the first digital labor platform for enterprises”](#). The headcount implications are already visible: Salesforce disclosed it had [reduced its own customer support staff from 9,000 to 5,000](#) through agentic AI. Microsoft disclosed that Microsoft 365 Copilot reached [15 million paid seats](#), with Copilot seat adds up [over 160% year-over-year](#). Cognition reported Devin revenue scaling from [€0.85M ARR \(Sept 2024\) to €61.9M ARR \(June 2025\)](#). ServiceNow announced its agreement to acquire Moveworks for [€2.42B](#) and said AI agents now resolve [~90% of IT requests](#) without human intervention.

Naming The Shift: Work-as-a-Service (WaaS)

I keep seeing the same shift described from different angles, like light refracting through a prism. Thoughtworks frames it as [Service-as-software](#): paying for autonomous outcomes rather than software seats. Others use terms like [Agentic AI as a Service \(AaaS\)](#) or [Agent-as-a-Service](#) to describe the delivery of goal-driven agents via platforms and APIs.

This essay proposes a clearer name for the category: **Work-as-a-Service (WaaS)**. The unit you buy is *work itself* (tickets resolved, briefs drafted, invoices reconciled, campaigns shipped), delivered by agents as an operational service.

Note: in IT, [WaaS is commonly used to mean “Workspace as a Service”](#) (desktop virtualization), which is not what I mean here.

Pricing is the clearest confession of intent. Salesforce lists Agentforce at [€1.70 per conversation](#). In legal services, large-firm partner billing rates can exceed [€1,950/hour](#), and AI copilots are increasingly priced like software rather than headcount. Companies like 11x sell named “digital workers” such as [Alice](#) and [Julian](#), explicitly targeting hiring budgets. OpenAI has [reportedly explored pricing specialized agents up to €17,000/month](#). McKinsey estimates that [currently demonstrated technologies could automate activities equivalent to ~57% of US work hours](#) (versus [up to ~30% of hours potentially automated by 2030 in their adoption modeling](#)).

And yet the ground truth demands honesty. Beneath the demos and the press photos, the metrics stay stubborn. An MIT Project NANDA report on enterprise genAI found [95% of surveyed organizations reported no measurable P&L impact](#) from their genAI initiatives. McKinsey's global survey found only [23% of organizations are scaling AI agents](#) while [39% are still experimenting](#). Goldman Sachs estimates generative AI could expose tasks equivalent to [~300 million full-time jobs](#) to automation, but the World Economic Forum projects [170 million jobs created and 92 million displaced by 2030](#), a net gain of [78 million](#) with major skills disruption in between.

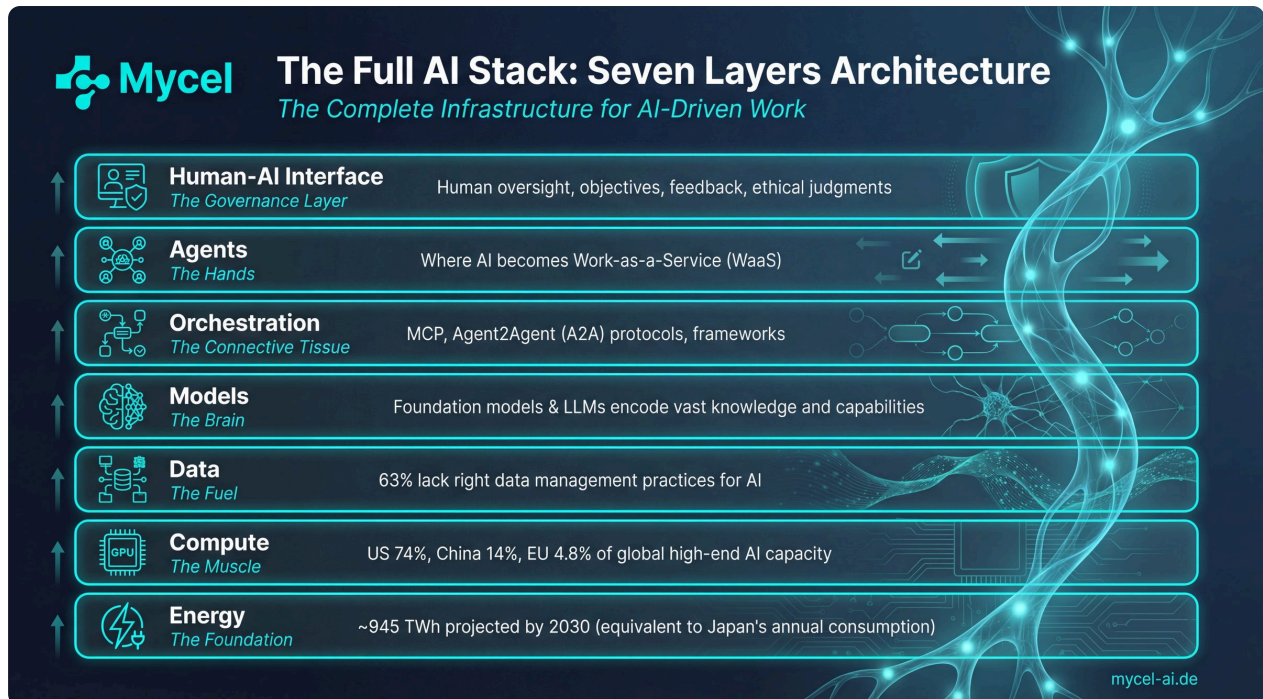
Venture capital is rarely sentimental. It does not invest in vibes. It invests in trajectories. Crunchbase estimates AI companies raised [€179B in 2025](#), about [half of global venture funding](#) and up [~85% year-over-year](#). Forecasts for the AI agent market vary, but one estimate puts it at [€6.47B in 2025](#) and projects growth to [€42.7B by 2030](#), while another projects [€200B by 2034](#). Industry standardization accelerated with the [formation of the Agentic AI Foundation \(AAIF\) under the Linux Foundation](#), co-founded by [Anthropic, OpenAI, and Block](#), which has since grown to [146 members](#). Anthropic's Model Context Protocol (MCP) had [10,000+ active MCP servers](#) by late 2025 and was [donated to AAIF](#), while the foundation's [AGENTS.md standard was adopted by 60,000+ open-source projects](#) including GitHub Copilot, Gemini CLI, and Devin.

This is no longer a question of whether AI will restructure work. It is a question of **who controls the infrastructure** on which that restructuring runs, and whether the current US-China duopoly in AI is the only game in town.

The Full AI Stack: Seven Layers

To understand the geopolitics of AI, you must first understand its architecture. I think of the AI stack as the anatomy of digital labor: electricity is the oxygen, compute the muscle, data the bloodstream, models the mind, orchestration the nervous system, agents the hands, and the human-AI interface the conscience.

This essay uses a **seven-layer** model, grounded in what has to exist to train and operate AI systems at scale. You will sometimes see these layers compressed into fewer boxes for convenience, but the separations matter. Each layer has different chokepoints, economics, and regulatory pressure.



Layer 1: Energy, the Foundation. At the base sits electricity. AI training and inference consume so much power that global data center electricity use is projected to **more than double to ~945 TWh by 2030**, roughly equivalent to **Japan's current annual electricity consumption**. Without cheap, reliable, and ideally clean power, nothing above this layer functions.

Layer 2: Compute, the Muscle. Next come the chips, servers, and data centers that convert power into processing capability. Global leadership in AI is tightly linked to compute capacity. The United States dominates cumulative AI supercomputer capacity, controlling an estimated **74% of global high-end AI compute**, while China holds **14%** and the EU **4.8%**. In 2024 alone, the United States added **5.8 GW of data center capacity**, compared with **1.6 GW in the EU**. Compute is capability: without enough GPUs and servers, you cannot train frontier models or deliver AI services at population scale.

Layer 3: Data, the Fuel. Data is the layer most often collapsed into “compute” or “models,” but in real deployments it becomes the bottleneck. Gartner warns that lack of AI-ready data can doom deployments: **63% of organizations either do not have, or are unsure they have, the right data management practices for AI**, and Gartner expects **60% of AI projects to be abandoned** without AI-ready data. Foundation models are only as good as the vast data they are trained on. This layer encompasses training data, enterprise data, vector databases, synthetic data generation, and data quality infrastructure. As a16z noted, in-context learning **“effectively reduces an AI problem to a data engineering problem”**.

Layer 4: Models, the Brain. Large-scale foundation models serve as the cognitive engines for performing tasks. They encode vast knowledge and capabilities, enabling them to recognize patterns, generate content, make predictions and decisions. Developing and owning advanced models is a strategic advantage, which is why there is a growing movement toward open-source and localized model development beyond the handful of US labs that currently dominate.

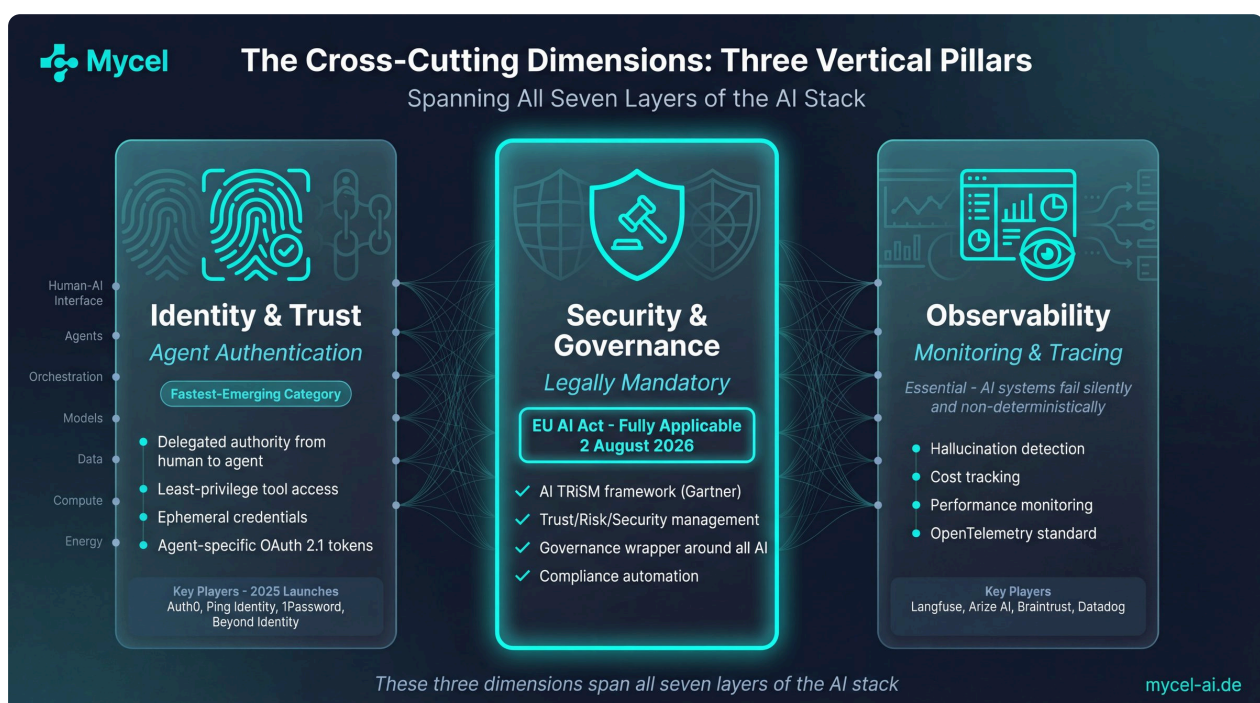
Layer 5: Orchestration, the Connective Tissue. This is the layer that separates toy demos from production systems. Orchestration includes agent frameworks (LangGraph, CrewAI, AutoGen), persistence engines (Temporal, Inngest), API gateways, and critically the emerging protocols: [MCP](#) for tool connectivity and [Agent2Agent \(A2A\)](#) for agent-to-agent communication. Nordic APIs calls AI gateways “[the missing layer in AI infrastructure](#)” for managing autonomous out-bound agent traffic. This layer transforms a stateless language model into a stateful, tool-using agent.

Layer 6: Agents, the Hands. Applied AI systems that carry out specific tasks or workflows. An AI agent uses one or multiple models plus tool integrations to achieve a goal autonomously. This is where AI becomes **Work-as-a-Service (WaaS)**: virtual assistants handling customer support, AI systems managing supply chains, expert systems assisting doctors. True autonomy emerges when multiple AI components work together in agentic architectures, beyond isolated models or chatbots.

Layer 7: Human-AI Interface, the Governance Layer. Even fully autonomous AI agents require human oversight at the top: setting objectives, providing feedback, handling exceptions and ethical judgments. This encompasses evaluation, safety checks, alignment tools, and the organizational policies that define what AI agents can or cannot do without human sign-off. It is the mechanism that connects the entire AI stack to human society, providing accountability and user-friendly channels for AI-delivered services.

The Cross-Cutting Dimensions

Beyond these seven horizontal layers, three vertical dimensions span the entire stack. They seep through everything, whether you plan for them or not.



Identity and Trust is the fastest-emerging new category. As agents act autonomously on behalf of humans, traditional identity management breaks down entirely. Key concepts include delegated authority, least-privilege tool access, and ephemeral credentials.

Security and Governance is legally mandatory under the EU AI Act, which entered into force on [1 August 2024](#) and will be fully applicable on [2 August 2026](#) (with staggered earlier obligations). In practice this forces governance capabilities across the stack; Gartner's AI TRiSM framing is widely used in industry discussions of this governance layer [as a Trust/Risk/Security management approach](#).

Observability, covering monitoring, tracing, hallucination detection, and cost tracking, is essential because AI systems fail silently and non-deterministically. [OpenTelemetry](#) is emerging as a vendor-neutral standard, with vendors offering specialized LLM observability.

The complete picture, then, is **seven horizontal layers plus three cross-cutting verticals**, bounded by regulatory frameworks and economic structures. Any nation or bloc that wants to be a serious AI player must have a credible position across all of them. Which brings us to the two regions that, together, might actually pull it off.

India's Ground Truth: Momentum and Gaps

Whenever I read a country through its press releases, I remind myself that announcements are weather, not climate. Strip away the government press releases and the startup hype, and India's AI infrastructure reveals a genuinely interesting picture: not the triumphalism of official announcements, nor the dismissal of skeptics, but a country with real momentum running into real constraints.

Energy: The Quiet Strength and Achilles Heel

India's energy story is both inspiring and unforgiving.

India crossed [500.89 GW of total installed electricity capacity](#) as of [30 September 2025](#), with non-fossil sources reaching [256.09 GW \(51.13%\)](#). Renewable energy capacity reached [220.10 GW as of 31 March 2025](#), after a record [29.52 GW added in FY 2024–25](#). On [29 July 2025](#), renewables met [51.5% of India's electricity demand](#) for the first time. As of [31 December 2025](#), total installed generation capacity stood at [513.73 GW](#), with non-fossil at [266.79 GW \(51.93%\)](#).

But the grid tells a harsher story. Capacity is the headline, reliability is the footnote that decides everything. Electric power transmission and distribution losses were [~14.16% of output in 2023](#). For data centers requiring five-nines uptime, reliability constraints still force heavy investment in redundant power or location limitations to stronger-grid metros.

Compute: Real, Still Constrained

Compute is where ambition meets physics.

India's installed data centre capacity stood at [~1.3 GW as of H1 2025](#), with Mumbai alone at [~594 MW operational](#) in that snapshot.

The GPU picture is accelerating. By the India AI Impact Summit in February 2026, the IndiaAI Mission reported [over 38,000 high-end GPUs operational](#), available to startups, researchers, and public institutions at [₹65 per GPU-hour \(~€0.61\)](#). The government announced [20,000 additional GPUs](#) to be added imminently, with a target to cross [100,000 GPUs by end of 2026](#). On the private side, Yotta's Shakti Cloud runs [16,000+ NVIDIA H100 GPUs](#) in production, and the company announced plans to [deploy 20,736 NVIDIA Blackwell Ultra GPUs](#) at its Greater Noida campus by August 2026. L&T partnered with NVIDIA to build [India's largest gigawatt-scale AI factory](#), and TCS announced [AI-optimized data centres scaling from 100 MW to 1 GW](#) with OpenAI as first customer.

Through the **India Semiconductor Mission** (outlay [€7.11B](#)), India reports that total approved projects under ISM reached [10](#) with cumulative investments of around [€15B](#). Tata's Dholera foundry partnership with PSMC highlights a focus on mature nodes, including [28nm](#).

Models: From Niche to Sovereign

Models are where narratives inflate fastest, and where constraints surface fastest too. But the India AI Impact Summit in February 2026 marked a genuine inflection point.

Sarvam, selected under the IndiaAI Mission to build India's sovereign LLM ecosystem, delivered on that promise at scale. On [18 February 2026](#), Sarvam launched two foundation models: [Sarvam-30B](#), a 30-billion-parameter mixture-of-experts (MoE) model activating ~1B parameters per token with a 32K context window, pre-trained on ~16 trillion tokens across all 22 scheduled Indian languages; and [Sarvam-105B](#), a 105-billion-parameter MoE model activating ~9B parameters per token with a [128K context window](#). Critically, Sarvam stated both models were [trained from scratch](#) on IndiaAI Mission compute (Yotta + NVIDIA), not fine-tuned on existing open-source systems like Meta's Llama or DeepSeek. Two days later, Sarvam launched [Indus](#), a consumer-facing AI chat application powered by the 105B model, handling text and voice in Hindi, Malayalam, Gujarati, English, and more, India's first serious indigenous rival to ChatGPT and Claude. Alongside these, Sarvam unveiled AI dubbing, speech recognition, TTS systems, enterprise conversational agent platforms, and [on-device AI for secure environments with Qualcomm](#).

The government-backed [BharatGen Param2](#), a 17-billion-parameter MoE model supporting 22 Indian languages with multimodal capabilities, was also unveiled at the Summit. Gnani.ai launched [Vachana TTS](#), a text-to-speech system capable of cloning voices in 12 Indian languages using less than 10 seconds of recorded audio. IndiaAI's [AI Kosh](#) has expanded to over 7,500 datasets and 270+ AI models as shared national resources.

Honesty remains essential. India's sovereign model ecosystem is real and advancing fast, but it is not yet at frontier scale. Open-source contributions show sustained strength: the Stanford AI Index estimates India was the [second-largest contributor to GitHub AI projects in 2024 \(19.9%\)](#). And the sovereignty picture is nuanced: while Sarvam's models are trained from scratch, some other Indian platforms (such as Yotta's myShakti consumer chatbot) build on DeepSeek's models, illustrating that true end-to-end sovereignty is emerging unevenly.

Agents and Workforce: The Paradox

India has a fast-growing AI services and startup ecosystem, but the workforce paradox remains. Momentum is real, and so is unevenness.

In the Stanford AI Index (LinkedIn-based metrics), India had one of the highest relative AI skill penetration rates in 2015–2024 ([2.5](#)) and the highest relative AI hiring rate year-over-year in 2024 ([33.4%](#)).

Yet overall skills benchmarks vary. Coursera's Global Skills Report 2025 ranks India [89th globally overall](#), and IMD's World Talent Ranking 2025 places India at [63rd](#). Meanwhile, the U.S. International Trade Administration notes India has a pool of [~600,000 AI professionals](#).

How can all of this be true at once? Because transitions are messy. India's opportunity is not just to grow the pool, but to deepen it, so momentum compounds into durable capability. The ecosystem is growing to match: a NASSCOM-Zinnov report counts [over 4,200 deep-tech startups in India, 84% of them in AI](#), with deep-tech ventures raising [€1.95B in 2025](#) (up 37% YoY). AI funding in India [jumped 58% in 2025](#), and the government approved a [€0.93B state-backed venture capital fund](#) for AI and advanced manufacturing startups, while also [doubling the deep tech startup recognition period to 20 years](#).

Europe's Complementary Hand

India brings scale and speed. Europe brings institutions, chokepoints, and the slow power of governance. Together, they could form something neither has alone.

Regulation as strategic asset. The EU AI Act, the world's first comprehensive AI regulation, will be fully applicable on [2 August 2026](#). Enforcement is already live: prohibited AI practices became [enforceable on 2 February 2025](#) (carrying penalties of up to €35M or 7% of revenue). Finland's [national AI Act supervisory laws took effect on 1 January 2026](#), designating [Traficom as the single point of contact](#). Love it or loathe it, the Act sets a benchmark for risk-based AI management and forces governance maturity across the stack for companies that want EU market access.

Research and capital. Horizon Europe is the EU's research and innovation programme for 2021–2027 with a budget of [€95.5 billion](#). Europe's open model work includes EuroLLM, whose team states it built [a multilingual model supporting all 24 official EU languages](#).

Hardware sovereignty. ASML is the [sole global manufacturer of extreme ultraviolet \(EUV\) lithography machines](#), a chokepoint technology for leading-edge semiconductors. EU industrial policy aims to scale manufacturing: the EU budget framing for the Chips Act highlights [€43 billion of policy-driven investment](#) through 2030.

Market access and institutional frameworks. The EU and India concluded negotiations for a Free Trade Agreement on [27 January 2026](#). India's factsheet states the agreement delivers unprecedented market access for [more than 99% of India's exports by trade value](#) and includes EU commitments across [144 services subsectors](#). The EU-India Trade and Technology Council's second ministerial meeting (February 2025) highlighted outcomes including the [GANANA EU-India high-performance computing project](#), which EuroHPC described as a [new project strengthening EU-India ties](#). Bilateral trade is projected to grow from [€120B to €200B by 2030](#) under the agreement.

The Corridor: Why India-Europe Is the Most Underexploited Opportunity in Global AI

What makes the India-Europe corridor distinctive is not diplomatic goodwill (there is plenty of that already), but the precision of complementarity across every layer of the AI stack. It is a bridge that can carry far more than we currently send across it.

India provides what Europe structurally lacks: a massive, cost-effective talent pool and fast AI labor momentum (in LinkedIn-based metrics, India has a relative AI skill penetration rate of [2.5](#) and the highest relative AI hiring rate year-over-year in 2024 at [33.4%](#)); and proven digital public infrastructure that Europe is still building (UPI processed [16.58 billion transactions in October 2024](#); Aadhaar has generated [~1.43 billion IDs](#)).

Europe provides what India critically needs: the world's first comprehensive AI regulation as a governance template; research funding at scale; semiconductor chokepoints through ASML/EUV and the Chips Act; and market access to the EU single market and the EU-India FTA. Indians are already the [#1 recipients of EU Blue Cards](#) (about [21,000 in 2023](#), [24% of total](#)).

The Collaboration Already Happening

The most concrete proof points are institutional and technical, and they accelerated dramatically in January–February 2026. Within a single month, the [EU-India Summit concluded the FTA](#) (27 January), the [India AI Impact Summit](#) drew strong European participation (16–21 February), and the [European Legal Gateway Office](#) was inaugurated in India (18 February) as a one-stop hub connecting Indian tech talent with European opportunities. The EU [endorsed the New Delhi Declaration on AI Impact](#), with Executive Vice-President Henna Virkkunen signing on behalf of the EU alongside [88 nations](#). France elevated its relationship with India to a [“Special Global Strategic Partnership”](#) and co-launched the [Indo-French Centre for AI in Health \(IF-CAIH\)](#) at AllMS New Delhi, involving the Sorbonne University, the Paris Brain Institute, and IIT Delhi.

Institutionally, the TTC has already backed collaboration in compute and AI governance, including [GANANA](#). Technically, Europe's EuroLLM team states it built a multilingual model supporting [all 24 official EU languages](#), while Sarvam's new foundation models now cover [all 22 scheduled Indian languages](#). A joint multilingual initiative spanning 46+ languages across both regions would be commercially valuable and geopolitically meaningful.

On digital infrastructure, the convergence is real. India's experience with [Aadhaar](#) and [UPI](#), digital ID and payments at population scale, aligns with Europe's ambitions around the [EU Digital Identity Wallet](#) and a [digital euro](#).

Meanwhile, China's DeepSeek has sharpened the strategic calculus. By training a frontier-competitive model for [~€5M](#) and releasing it under an MIT license, DeepSeek demonstrated that cost-efficient AI is viable, validating the “third force” argument that you do not need US-scale capital to compete. India is explicitly pursuing what commentators call a [“Third Track”](#): neither the American mega-model approach nor the Chinese state-driven model, but applied AI at scale for 1.4 billion people, with sovereign models like Sarvam's trained from scratch on domestic infrastructure. The India-EU corridor can differentiate not by outspending either superpower, but by outgoverning them: building trusted, transparent, and interoperable AI systems grounded in shared democratic values.

The Gap That Defines the Opportunity

Yet the investment scale has been asymmetrical. In cumulative private AI investment since 2013, India attracted [€9.57B](#), versus the United States at [€399B](#) and China at [€101B](#), according to the Stanford AI Index. But the trajectory is shifting: the India AI Impact Summit generated [over €169B in infrastructure investment pledges](#), including [€12.7B from Google](#) for a full-stack AI hub in Visakhapatnam and [€14.8B from Microsoft](#) for cloud and AI infrastructure. Pledges are not deployments, and this essay's own framing applies: announcements are weather, not climate. But the scale of commitment signals that the gap is no longer structural destiny.

The infrastructure for scaling exists. The [FTA](#) moves goods and people, the [TTC](#) creates frameworks, and [Horizon Europe](#) provides funding. What is missing is the **operational connective tissue**: platforms, matchmaking, and workflow management that enables thousands of researchers and organizations to collaborate across borders efficiently. The scaffolding is in place. The traffic it carries is a tiny fraction of its capacity.

The Institutional Chassis

If the India-Europe corridor is to become more than a stack of bilateral MoUs, it needs institutional vehicles — structures that can coordinate across dozens of countries, attract serious funding, and evolve over decades. Institutions are the long-duration batteries of cooperation. The surprising discovery is that the EU's partnership architecture already maps onto the AI stack's most physical layers, and India already has a foothold in each one.

Three Vehicles Already on the Road

Compute. The [EuroHPC Joint Undertaking](#) has a budget of [~€7B](#) across [38 participating states](#), and — uniquely — an [explicit regulatory mandate](#) (Regulation EU 2021/1173) to develop strategic R&I partnerships with India, Japan, Brazil, and the USA. This is not aspirational; it is law. The mandate is already operational: the [GANANA project](#) (February 2025 – January 2028), funded at [€5M under Horizon Europe](#), links seven European countries with five Indian institutions including [C-DAC](#) and [AIRAWAT](#), coordinated by [KTH Royal Institute of Technology](#). With EuroHPC's expanded mandate now including [AI Factories](#) (Council Regulation EU 2024/1732), the compute bridge between Europe and India has a legal, funded, and institutional foundation.

Hardware. The [Chips Joint Undertaking](#) has an expected budget of [nearly €11B](#) (part of the broader [€15.8B Chips for Europe Initiative](#) through 2030) across 31 participating states for semiconductor R&D and manufacturing. In 2024, the Chips JU ran a [bilateral cooperation call with South Korea](#) in heterogeneous integration and neuromorphic computing — [four co-funded projects were selected](#) at ~€12M total. India is not yet a participating state, but the pathway is clear: the [EU-India Semiconductor MoU](#) (November 2023) and TTC-2 commitments on [joint R&D in chip design and dedicated talent exchange](#) lay the groundwork for an India-specific call following the South Korea template. India's own [Semiconductor Mission](#) (€8.5B, [10 approved projects](#)) is the natural counterpart.

Energy. The [Clean Energy Transition Partnership \(CETPartnership\)](#) is the deepest vehicle of the three, because [India is already a full participating country](#) — one of only a handful of non-European nations, alongside Canada, Israel, South Korea, Tunisia, the UK, and the USA. India participates through the [Department of Science & Technology \(DST\)](#), with national funding bodies on both sides co-investing directly in joint projects. The CETPartnership Joint Call 2025 has a to-

tal budget of [over €80M](#) committed by around [40 national/regional funding organisations](#) in [30 countries](#), structured across [seven Transition Initiatives \(TRIs\)](#) covering the clean energy spectrum. The U.S. Department of Energy published a parallel funding notice for Joint Call 2024 with [up to €6.78M](#).

These three span hardware, compute, and energy – the most physical, capital-intensive layers of the stack. The institutional infrastructure exists. The question is whether any of them can become the chassis for something larger. The most instructive case is the one where India is already inside.

Why Energy Is the Binding Constraint

Electricity is not a footnote in AI. It is the limiting reagent.

The IEA projects global data center electricity consumption will more than double to approximately [945 TWh by 2030](#). Every one of CETPartnership's existing research areas directly serves this demand: zero-emission power addresses on-site clean generation for data centers; storage and hydrogen cover backup power; regional energy systems encompass planning for data center cluster integration; built environment connects to energy-efficient facility design.

India's alignment with this agenda is direct. A Ministry of Power note on India's transition agenda states the National Green Hydrogen Mission targets [at least 5 MMT per annum of green hydrogen capacity by 2030](#). In photovoltaics, MNRE reported that an IIT Bombay-incubated startup developed a tandem solar cell with [29.8% conversion efficiency](#).

A dedicated **“Clean Energy for Digital Infrastructure” research stream**, potentially a new Transition Research Initiative, could attract co-funding from hyperscalers whose energy strategies increasingly include large-scale clean-energy procurement, while aligning CETPartnership's mission with the fastest-growing source of electricity demand globally.

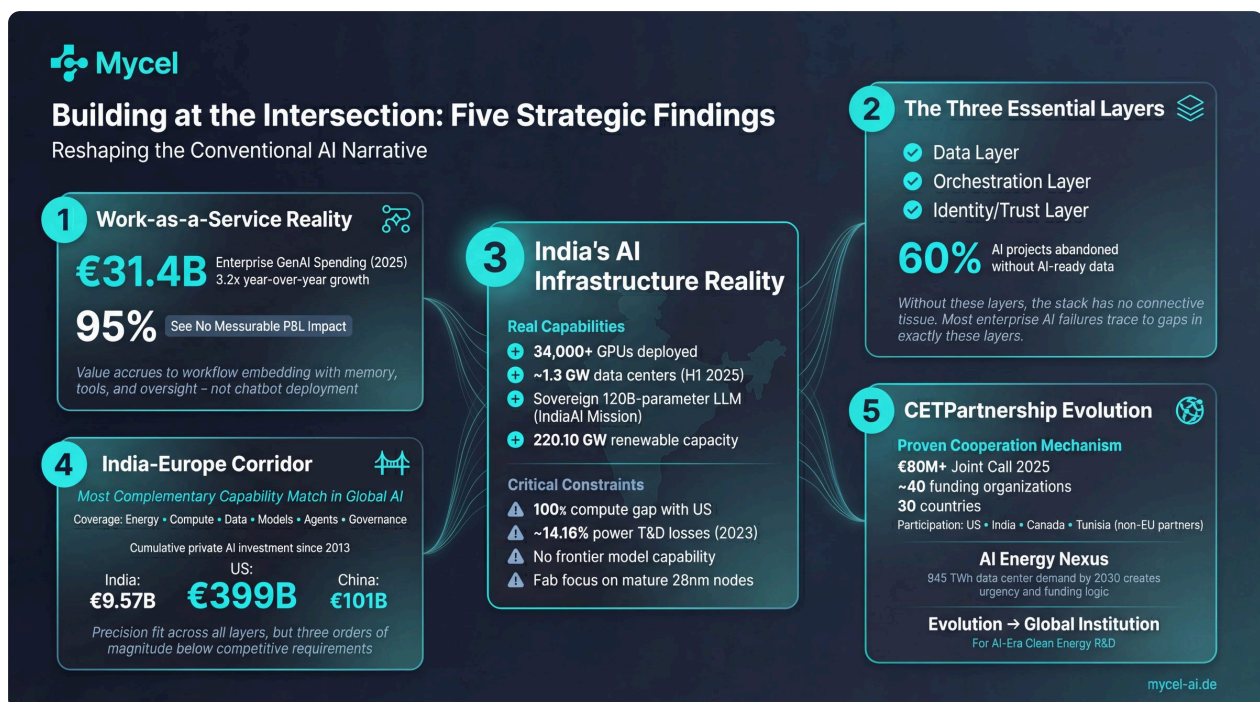
Historical Precedents Chart the Path

Three models illuminate how large research and innovation partnerships can go global:

CERN (established in [1954](#)) shows how Europe can lead a long-lived intergovernmental research organization while welcoming non-European participation through [tiered governance](#) (Member States, Associate Member States, and Observers). **ITER** shows how a mega-project can be governed by [seven members](#) while being built largely through [in-kind contributions](#), with India responsible for major components including the [cryostat](#), [cryolines](#), and [cooling water and heat rejection](#). **Mission Innovation** shows a lighter-weight commitment model: in its [joint launch statement](#), participating governments committed to seek to [double clean-energy R&D investment over five years](#).

The most viable evolution path combines elements of all three. CETPartnership already has India inside; the next step is scaling ambition, not gaining entry. In the near term, a dedicated clean-energy-for-AI research stream could attract hyperscaler co-funding. In the mid term, the partnership could evolve from a co-funded programme into an independent intergovernmental framework with a permanent secretariat and multi-year budget. Over the long term, it could become a durable global institution for coordinating clean-energy R&D for the AI era.

What This Means: Building at the Intersection



Five findings keep surfacing as I stitch these threads together. They reshape the conventional narrative.

First, AI **Work-as-a-Service (WaaS)** has moved from concept to **€31.4B** with real production deployments (Gartner forecasts worldwide AI spending of **€2.13T in 2026**, up 44% year-over-year), but **95% of surveyed organizations still report no measurable P&L impact**. The value accrues to those who embed agents into workflows with memory, tools, and human oversight, not those who simply deploy chatbots.

Second, the stack only becomes real when it has connective tissue: a Data Layer, an Orchestration Layer, and an Identity/Trust Layer. Most enterprise AI failures trace back to gaps in exactly these layers.

Third, India's AI infrastructure reality is accelerating beyond expectation: [38,000+ GPUs operational](#) (targeting [100,000 by end of 2026](#)), [~1.3 GW of installed data centre capacity \(H1 2025\)](#) with gigawatt-scale expansions underway, and sovereign models that are no longer promises but products: Sarvam's [105B-parameter MoE model](#) trained from scratch and the [Indus chat application](#) as a consumer-facing proof point. But power-system losses ([~14.16% T&D losses in 2023](#)) and a still-early domestic chip manufacturing base (with current fab plans focused on mature nodes like [28nm](#)) define the constraints.

Fourth, the India-Europe corridor offers the most complementary capability match in global AI, with precision fit across energy, compute, data, models, agents, and governance. The historic investment gap (cumulative private AI investment since 2013: India [€9.57B](#) vs the U.S. [€399B](#) and China [€101B](#)) is being met with unprecedented commitments: the India AI Impact Summit drew [over €212B in infrastructure pledges](#) according to IT Minister Ashwini Vaishnaw, and the [New Delhi Declaration](#) was endorsed by 88 nations. Pledges are not deployments, but the trajectory has visibly inflected.

Fifth, the institutional chassis already exists. Three EU partnerships — [EuroHPC JU](#) (compute), the [Chips JU](#) (hardware), and the [CETPartnership](#) (energy) — already span the AI stack's most physical layers, and India has cooperation mechanisms in each. CETPartnership is the most advanced: [India is already a full participating country](#) in its [€80M+ annual joint calls](#) across [30 countries](#). The path from co-funded partnership to a durable global institution for clean-energy-meets-AI R&D follows precedents (CERN, ITER, Mission Innovation) that took decades but changed the world.

The Strategic Insight

The infrastructure for India-Europe AI cooperation exists institutionally but **lacks the operational platforms to function at scale**. The FTA moves goods and people. The TTC creates frameworks. Horizon Europe provides funding. EuroHPC JU, the Chips JU, and CETPartnership coordinate compute, hardware, and energy research respectively. What is missing is the layer that makes cross-border knowledge work frictionless. That is the same layer that AI agents are now capable of providing.

Somewhere in a lab tonight, a researcher is wrestling with yet another template, another portal, another reporting format. The tragedy is not the paperwork itself, but the cumulative waste of human attention. This is exactly the kind of friction that orchestration layers and agents can sand down.

Research funding runs through a fragmented patchwork of organisations, each with distinct processes. The CETPartnership Joint Call 2025 alone spans [~40 national/regional funding organisations](#) across [30 countries](#), each with different submission formats, evaluation criteria, and reporting requirements. That kind of fragmented, high-complexity workflow is exactly what AI agents and orchestration layers can help simplify.

The numbers point to a quiet opportunity. Whoever builds the **operating system for cross-border research collaboration**, connecting European funding mechanisms with Indian talent, bridging clean energy R&D with AI infrastructure needs, and reducing the administrative burden on researchers through AI agents, will be riding a convergence of trillion-dollar trends with remarkably thin competition.

Neither the US nor China has an interest in building this. Their AI strategies are fundamentally about consolidation and control. The India-Europe corridor, by contrast, is about **distribution and cooperation**, an alternative model that, if it scales, could form a credible third force in global AI. Not by outspending the superpowers, but by out-connecting them.

The coming decade will reveal whether these partnerships can cement a third major AI power bloc, one built on cooperation, shared values, and complementary strengths, shaping the future of work and knowledge as a truly global service. The window is open. It will not stay open forever.

#genai

#india-ai

#india-europe

#ai-stack

#digital-labor

#work-as-a-service

#third-force

#india-ai-summit

#sarvam

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Currency normalization: All non-euro amounts are converted to euros using the European Central Bank euro foreign exchange reference rates published 2026-02-26 (1 USD = €0.8465; 1 INR = €0.009309). Conversions are approximate.

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I know this reads like an ambitious thesis: a seven-layer stack, a new category of Work-as-a-Service, and a call to turn India-Europe cooperation into something closer to an operating system for cross-border research. I am also aware of how hard that is in practice, different legal regimes, procurement rules, funding portals, languages, incentives. But transformational change rarely arrives fully formed. It starts when builders and policymakers stop asking whether something is realistic, and start arguing about how to remove the roadblocks. The core philosophy is simple: distribute capability, reduce friction, and let experimentation compound. This cannot be delivered overnight through top-down control; it will be won through pragmatic, interoperable systems that make collaboration feel effortless. Even partial success would matter, because the “third force” will not be built by outspending the superpowers, but by out-connecting them.

– **Alphin Tom**



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