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The Fog and The Headlights: Navigating an Opaque Future

Introduction: The Weight of the Moment

Prof. Bhasker, distinguished faculty, proud parents, and most importantly, the graduating Class of 2026.

Thank you for having me here. It is a genuine honor to stand at the Red Bricks of IIMA. This institute has a way of making everyone feel a little bit humble, and I am no exception.

When I received the invitation to be your Chief Guest, I must admit, I had a moment of pause. I sat in my office in Bangalore, looked out the window, and thought about the journey that brought me here.

If you had gone back in time roughly 30 years and visited a certain small town in Uttar Pradesh, Saharanpur, and found a young boy studying for his exams, and told him:

'One day, you will be the Head of AI for Reliance. You will have worked at Google DeepMind. You will be standing at IIMA telling the next generation how to run the world...'

That boy would have laughed at you.

Not because he didn't dream. But because he couldn't see it.

That path was invisible. It was, to use a word you will hear me say often today, **opaque**.

And that is what I want to talk to you about today. I don't want to talk about 'Success' in the abstract. I want to talk about the terrifying, exhilarating, and necessary art of walking into the fog when you have absolutely no idea where



the road ends.

The Theory of the Headlights (The Origin)

Let's start at the beginning. I come from a humble background in a small town in UP. Now, growing up in a small town in the 90s is very different from the connected world you live in today.

We didn't have high-speed internet. We didn't have 'roadmaps' to Silicon Valley. We didn't have LinkedIn to stalk the careers of successful people and reverse-engineer their paths.

We just had the immediate reality.

In that environment, you develop a specific survival mechanism. You learn that you cannot obsess about the destination that is 1,000 kilometers away, because you can't even see it.

If I had spent my childhood worrying about how to get a BTech degree in Computer Science from IIT Madras, or a PhD from a top US University or how to get into a global tech giant Google Deepmind, I would have been paralyzed by the sheer distance of that goal.

Instead, I adopted what I call **The Headlights Philosophy**.

Imagine driving a car, or in my case, commuting by cycle, on a dark, foggy winter morning. The fog is so thick you can only see 10 meters ahead.

You can't see the destination. You can't see the horizon. You can only see the patch of road illuminated by your headlights.

Logic says: *'Stop. It's unsafe. You don't know what's ahead.'*

But the driver knows a secret: **If you can see 10 meters, you can travel 10 meters.**

And when you travel those 10 meters, the *next* 10 meters become visible.

And if you just keep doing that, focusing hyper-intensely on the immediate step,



you can cross the entire world.

That was my early life. I pushed hard towards the *visible* goal, the next exam, the next project, the next concept, while being largely opaque about the distant future. I didn't have a 10-year plan. I had a 10-hour plan. And that was enough.

Not to say, one must not have a 10-year plan but the absence of that must not dissuade you from focussing on the immediate seemingly smaller goals but that invariably add up to something very large over time.

The Courage to Leave the Peak (DeepMind to Ananas)

Fast forward a few years. That '10-meter' strategy landed me at what many consider the summit of the AI world: **Google DeepMind**.

I was working with the smartest researchers on the planet. We were solving problems that had never been solved before. By every conventional metric, salary, prestige, comfort, I had 'arrived.'

And this brings me to the second lesson.

Sometimes, the headlights show you a turn that isn't on the map.

I remember sitting there, realizing that while I loved the *research*, I was missing the visceral connection to *impact* in my country. I wanted to build in India, innovate in India. I wanted to see technology touch lives, not just papers in my immediate neighborhood.

So, I did something that looked completely irrational to everyone around me. I left Google DeepMind.

And I didn't leave for a bigger offer. I left to start a boutique AI R&D company called **Ananas Labs**.

Now, looking back, this is the part of the movie where the music usually swells and a montage shows me becoming a billionaire.



That didn't happen.

If you look for Ananas Labs on the stock market today, you won't find it. We didn't ring the opening bell on Nasdaq or even NSE.

But let me tell you something important. That period, leaving the safety of a giant to build something fragile of my own, was the most critical 'dot' in my career.

It taught me things DeepMind never could.

It taught me how to sell. It taught me how to survive without a brand name behind me. It taught me that a title is something you rent, but your skills are something you own.

Steve Jobs famously said, *'You can't connect the dots looking forward; you can only connect them looking backward.'*

When I was struggling with Ananas, I didn't think, *'Ah, this is great preparation for my future role at Reliance!'*

No. I was just stressed. I was just trying to make it work.

But today? Today I stand at Jio, building AI for a billion Indians. And I can tell you with absolute certainty: **I could not do this job without the research discipline I learned at DeepMind, and I could not do this job without the scrappy, builder spirit I learned at Ananas.**

The dots connected. But only because I was willing to walk into the fog.

Building for Bharat (The Present)

That brings me to the present, and the work we are doing at Jio.

We are currently in one of the most exciting phases of technology in human history. But nowhere is it more exciting than right here in India.

At Jio, we run innovation sprints. The energy in each one of them is electric. We



are building voice models for not just Hindi and English but going the last mile as far as even **Garhwali**, a language spoken by few, often ignored by the big global models.

We are asking questions like: *'How do we make AI accessible to a grandmother in a village who can't read text but can speak to her phone?'*

This is the difference between 'Artificial Intelligence' as a buzzword and 'Artificial Intelligence' as a tool for nation-building.

And this is where **you** come in.

You are graduating from IIMA. You are the elite. You have the best analytical toolkit in the world.

But I want to challenge you.

Do not just use your skills to optimize click-through rates. Do not just use your skills to make the wealthy wealthier.

Look at the problems around you in India. They are messy. They are unstructured. They are opaque.

But they are the ones worth solving.

When we build at Jio, we don't always know the business model on Day 1. We don't always know if the tech will work perfectly. But we know the *need* is there. We trust the headlights.

The Horizon (The Call to Action)

So, what does this mean for you, the Class of 2026?

You are graduating into a world that is fundamentally uncertain.

Everyone is talking about Generative AI, AGI, and the displacement of jobs.

You are asking yourselves: *'What is the future of business? What will my career look like in 2035?'*



I will be honest with you: **I don't know.**

And neither do you.

That future is opaque.

But here is my advice: **Do not let the opacity of the future paralyze the utility of your present.**

1. **Stop trying to predict.**

The world is moving too fast for 5-year plans. By the time you execute a 5-year plan, the assumptions you made in Year 1 will be obsolete.

Instead, be agile. Be ready to pivot. Be like the cyclist in Bangalore traffic - awake, alert, and moving.

2. **Focus on the Craft.**

At DeepMind, and now at Jio, the people who succeed are not the 'strategy guys' who talk about AI. They are the 'builders' who *do* AI.

Be a builder. Whether you are in finance, marketing, or tech, get your hands dirty. Understand the nuts and bolts.

3. **Trust the Fog.**

It is okay to not know where you will be in 10 years. In fact, it's better. It keeps you hungry.

If you had shown me my future when I was that boy in UP, I might have been too scared to start.

The uncertainty is not a bug in the system; it is a feature.

Conclusion

As you walk out of these gates, you will feel pressure to have it all figured out.

Ignore that pressure.

Remember the boy from UP.

Remember that the path from a small town to DeepMind to Jio was not a straight line. It was a zig-zag. It was a series of 10-meter sprints in the fog.

So, turn on your headlights.



Focus on the step immediately in front of you. Push hard.

And trust that one day, you will look back, the fog will lift, and you will see that you have connected the dots to build a masterpiece.

These Red Bricks have never promised certainty. They have always promised responsibility. Congratulations, Class of 2026.

Go build the future. Thank you.