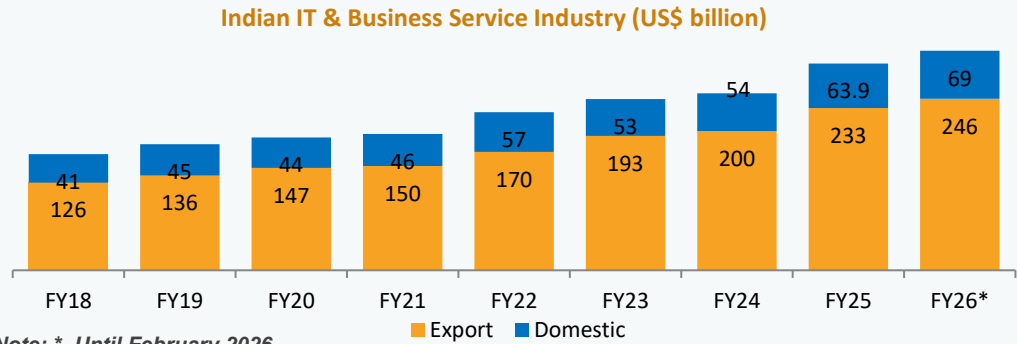




IT & BPM

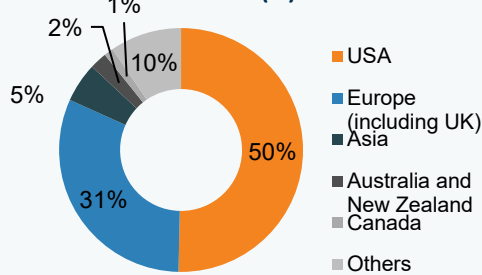


MARKET SIZE

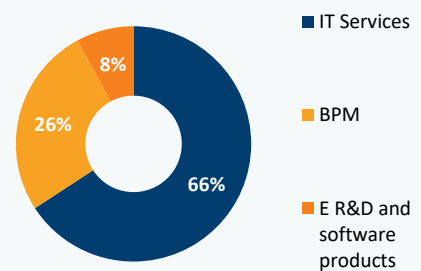


SECTOR COMPOSITION

Geographic breakup of export revenue in FY25 (%)

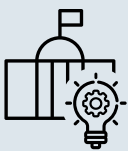
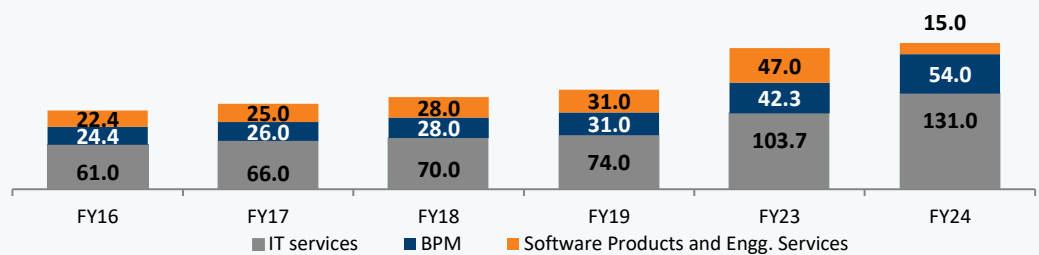


Sector-wise Break-up of Export Revenue (FY25)



KEY TRENDS

Growth in Export Revenue (US\$ billion)



GOVERNMENT INITIATIVES



Make in India



Phased Manufacturing Programme (PMP)



Simplified Other Service Provider (OSP) guidelines



ADVANTAGE INDIA

- **Growing demand:** India's domestic IT & Business Services market reached US\$ 64 billion in 2025, growing 18.52% YoY, with IT Services alone accounting for 71.17% of the market. The Indian AI market is expected to grow to USD 131.31 billion by 2032 at a CAGR of 42.2%.
- **Global Footprint:** As of February 2026, TCS employs more than 22,000 people across 30 offices in the UK and Ireland, making it among the region's biggest IT employers.
- **Policy Support:** The India AI Mission alone has been allocated Rs. 2,000 crore (US\$ 236.4 million) in 2025-26, a significant leap from Rs. 173 crore (US\$ 8.6 million) in the previous year.
- **Competitive Advantage:** India's IT ecosystem is set for strong growth, with emerging technologies expected to drive a 20% rise in new jobs in 2025.
- **Increasing investments:** The computer software and hardware sector in India attracted cumulative foreign direct investment (FDI) inflows worth Rs. 8,31,772 crore (US\$ 110.16 billion) between April 2000-June 2025. The sector ranked second in FDI inflows as per the data released by DPIIT.