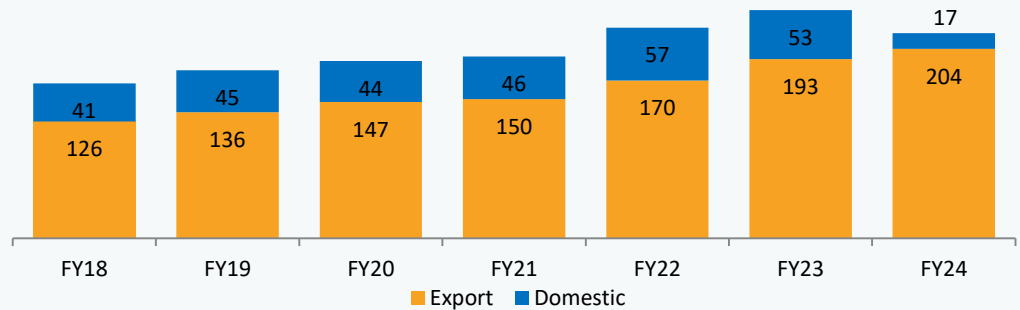


IT & BPM



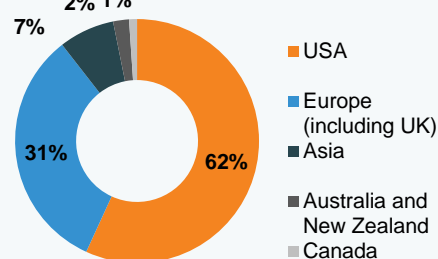
MARKET SIZE

Indian IT & Business Service Industry (US\$ billion)

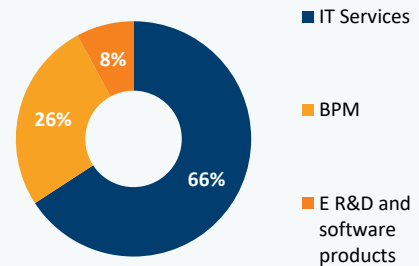


SECTOR COMPOSITION

Geographic breakup of export revenue in FY24 (%)

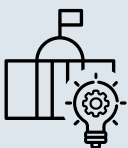
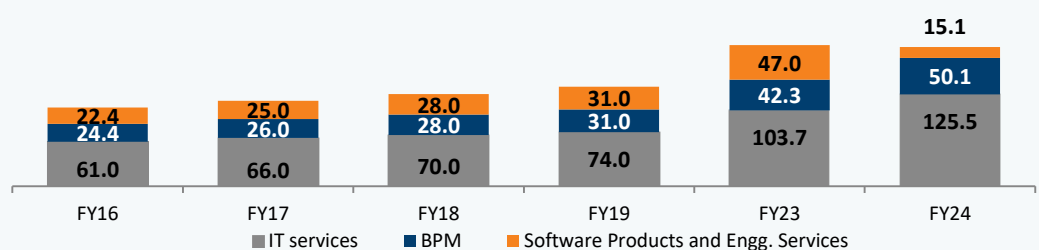


Sector-wise Break-up of Export Revenue FY24



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 AI market is projected to reach US\$ 28.8 billion by 2025 at a 45% CAGR, with Global Capability Centres expected to generate 22–25% of net new white-collar tech jobs in 2025; of the 4.7 million new tech jobs projected by 2027, over 1.2 million are likely to come from GCCs, driven by GenAI and engineering R&D.
- Global Footprint:** Indian IT firms have delivery centres all across the world and are well diversified across verticals such as BFSI, telecom and retail.
- Policy Support:** The PLI scheme for IT Hardware and its 2.0 version have generated Rs. 10,014 crore (US\$ 1.14 billion) in production, Rs. 522 crore (US\$ 59.3 million) in investment, and 3,879 jobs as of December 2024.
- 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.