

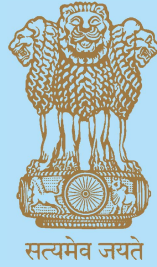
India's Export of ICT-enabled Services

An all-India Survey : 2017-18

Directorate General of Commercial
Intelligence and Statistics
Ministry of Commerce and Industry
Government of India

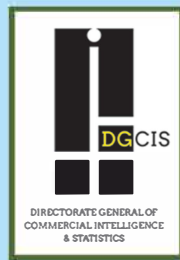
OCTOBER 2020





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List of Abbreviations

ICT	Information and Communications Technology
DGCIS	Directorate General of Commercial Intelligence & Statistics
UNCTAD	United Nations Conference in Trade and Development
UNSC	United Nations Statistical Commission
INR	Indian Rupee
USD	US Dollar
GATS	General Agreement on Trade in Services
FDI	Foreign Direct Investment
RBI	Reserve Bank of India
ITRS	International Transaction Reporting System
FEMA	Foreign Exchange Management Act
BoP	Balance of Payment
NSC	National Statistical Commission
BPO	Business Process Outsourcing
SRSWOR	Simple Random Sampling Without Replacement
BPM6	Balance of Payments and International Investment Position Manual, 6th edition
ISIC	International Standard Industrial Classification
TRAI	Telecom Regulatory Authority of India
TEPC	Telecom Equipment and Services Export Promotion Council
STPI	Software Technology Parks of India
IRDAI	Insurance Regulatory and Development Authority of India
MHRD	Ministry of Human Resource Development
NASSCOM	National Association of Software and Services Companies
EBOPS	Extended Balance of Payment Services



FOREWORD

*R*apid increase of trade in services has led to a growing demand for timely and reliable disaggregated level data on trade in ICT-enabled services from countries exporting these services. India, with its rapid growth in the ICT sector coupled with the dominant position it holds in world trade in services, is no exception to this demand.

Directorate General of Commercial Intelligence & Statistics with active support from the Department of Commerce in the Government of India has, therefore, been making sustained efforts to improve the data availability of export of ICT-enabled services in the country. This Directorate launched the first pan-India survey on export of ICT-enabled services in technical collaboration with the United Nations Conference in Trade and Development (UNCTAD) in July 2017 to collect data for FY 2016-17. The report released in June 2018 had been widely acclaimed both nationally and internationally. DGCIS thereafter launched the second pan-India survey on export of ICT-enabled services in October 2018 to capture data in respect of financial Year 2017-18. This report is the presentation of the findings of the survey covering about 3000 enterprises exporting ICT-enabled services distributed across different categories of services.

With the knowledge and experience gained from the first survey, DGCIS made several changes to the survey instruments used for capturing information in the 2016-17 survey. Provisions for collection of information in respect of services delivered through subsidiaries/associates abroad for different categories of services,

employment figures by offshore and on-site employment, State/UT-wise export figures, drilling down to capture information on sub-categories for a few important services categories are some of the changes introduced in this round of the survey.

While there were certain issues that DGCIS experienced during the course of the survey like non-availability of a Business Register that could provide a complete list of ICT-enabled service providers, it has nevertheless been a great learning experience for DGCIS that would help in further strengthening of the data collection of ICT-enabled services in future. With Business Register still not available in India, DGCIS, in collaboration with several Government agencies tried to prepare an exhaustive list of units exporting ICT-enabled services. However, in spite of best efforts, omissions are bound to occur. This may induce some non-sampling errors in estimation.

I would like to express my deep appreciation for the efforts put in by all officials as well as the Field Officers of Services Trade Statistics Division of DGCIS. I am grateful to the industry for their wholehearted support in successful completion of the survey. I am sure that this report will prove useful to our planners, policymakers, researchers, users from the industry and all those associated with designing policies for promotion of ICT-enabled services exports in the country.

(Amitabha Pradhan)
Director General, DGCIS



EXECUTIVE SUMMARY— HIGHLIGHTS



- Rapid transformation in the nature of services traded coupled with increased disintegration of production services has led to a growing demand for timely and reliable disaggregated level data on trade in ICT-enabled services from countries exporting these services including India.
- Adopting the definition of 'ICT-enabled services' developed by UNCTAD, Directorate General of Commercial Intelligence & Statistics conducted the first pan-India survey to collect information on India's exports of ICT-enabled services by partner country and mode of delivery of services for financial year 2016-17. This was the second survey on export of ICT-enabled services by DGCIS to capture data for financial Year 2017-18. The survey covered 2854 enterprises distributed across 9 categories of services.
- Potential ICT-enabled services exports covering 9 different categories, namely, (i) Telecommunications, (ii) Computer Services, (iii) Sales and marketing services, not including trade and leasing services, (iv) Information services, (v) Financial services, (vi) Management and back office services, (vii) Licensing services, (viii) Engineering and R&D services and (ix) Education services in FY 2017-18 was valued at USD 119.5 billion. The corresponding value in 2016-17 was USD 103 billion. Thus, export of potential ICT-enabled services in dollar terms registered a growth of almost 16% in 2017-18.
- Higher export in potential ICT-enabled services in 2017-18 over 2016-17 was mainly accounted for by 20% growth in export of computer services from USD 65.1 billion in 2016-17 to USD 78.2 billion in 2017-18, 25% growth in Engineering services from USD 11.7 billion in 2016-17 to USD 14.7 billion in 2017-18, 7% growth in export of Management and back office services from USD 13.9 billion in 2016-17 to almost USD 15 billion in 2017-18 and 12% growth in export of Telecommunication services from USD 2.8 billion in 2016-17 to USD 3.1 billion in 2017-18.
- Mode 1 or ICT-enabled services contributed to 81% of potential ICT-enabled services export while Mode 4 contributed to 19%. Supply of potential ICT-enabled services through Mode 2 was negligible (0.1%). As compared to 2016-17, share of Mode 1 in export of Computer services increased from 73% in 2016-17 to 78% in 2017-18 and share of Engineering and R&D services declined from 82% to 78% in 2017-18. Share of Mode 4 in computer services declined from 27% in 2016-17 to 22% in 2017-18. In case of engineering services share of Mode 4 increased from 17% in 2016-17 to 22% in 2017-18.
- In 2017-18, America was the largest destination of India's exports of potential ICT-enabled as well as ICT-enabled services with about 56% of both potential ICT-enabled services and ICT-enabled services exported to this destination. Europe was the second largest destination accounting for 25% of India's total exports of potential ICT-enabled and about 26% of total exports of ICT-enabled services. The third important continent for India's export of potential ICT-enabled services was Asia contributing to about 11% of potential ICT-enabled and 10% of ICT-enabled services.
- The United States was the largest destination for India's export of potential ICT-enabled as well as ICT-enabled services in 2017-18. Other important destinations of export of potential ICT-enabled services from India during 2017-18 were the United Kingdom (11%), Singapore (4%), Germany (3%), Australia (3%), Other European Countries and Netherlands, each with a share of 2.3%.
- Export of computer services to USA had increased from USD 38.6 billion in 2016-17 to USD 45 billion in 2017-18, a growth of almost 17%. Export to UK also increased from USD 6.4 billion in 2016-17 to USD 8 billion in 2017-18, a growth of 24%. Other destinations with positive growth in 2017-18 are Germany, Netherlands and Australia. Exports to Singapore declined from USD 4 billion in 2016-17 to USD 3.3 billion in 2017-18. Export to South Asia at USD 585 million recorded a 68% decline in 2017-18.
- Computer programming and consultancy and related activities (ISIC code 62), Information service activities (ISIC code 63), Office administrative, office support and other business

support activities (ISIC code 82), Architectural and engineering activities, technical testing and analysis (ISIC code 71) and Telecommunications (ISIC code 61), were the top five principal activities reported by the surveyed enterprises. The top five principal activities contributed to more than 85% of exports of potential ICT-enabled services.

- In 2017-18 around 5% of the potential ICT-enabled services exporting enterprises employed up to 9 employees, 23% employed 10 to 49 persons, 34% employed 50 to 249 persons and 38% enterprises employed more than 250 persons.
- Although the number of enterprises with employment sizes 0 – 9, 10 – 49 and 50 – 249 constituted almost 62% of the total number of enterprises, their contribution to potential ICT-enabled services exports during 2017-18 was only 4%. With a share of 38%, large enterprises contributed to 96% of potential ICT-enabled services exports.
- As per the survey, 72% of persons employed in enterprises exporting potential/ICT-enabled services were male and 28% female. Information services had the highest share of 37% female employment followed by management and back office services and computer services both having female employment in excess of 30%.
- The 2017-18 survey data revealed that large enterprises employing more than 250 persons had 87% offshore and 13% onsite employment while enterprises with employment in the range of 50 to 249 persons had a share of 95% offshore and 5% onsite employment.
- In Computer Services, sub-categories Computer Software, IT design and development services and IT consulting and support services, with exports valued at around USD 32, 22 and 18 billion respectively, contributed to 90% of computer services export. Other computer services had exports of USD 6 billion.
- In the Management and back office services category the sub-category accounting, auditing, bookkeeping, Tax consultancy and insolvency and receivership services had exports valued at USD 2.3 billion and the sub-category Business and Management consulting and public relations services USD 2.8 billion. Export of legal services was nominal at USD 0.2 billion. However, it is the sub-category 'other business services' that has contributed close to USD 10 billion in the export of Management and back office services.
- The overall export intensity for the potential ICT-enabled services in 2017-18 was 56% indicating a high level of dependence on exports. Among the 9 categories of potential ICT-enabled services, Computer services and Management and back office services with export intensities of 88% and 85% continued to show their high dependence on exports.
- Karnataka, with exports valued at USD 37.4 billion had 31% share in India's export of potential ICT-enabled services. Other states with significant share in export of potential ICT-enabled services were Maharashtra with exports at USD 25 billion and 21% share, Tamil Nadu with exports at USD 16.9 billion and 14% share and Telangana with exports at USD 13.7 billion and 12% share.
- ICT-enabled services delivered through all the four modes in 2017-18 were valued at USD 142.5 billion; ICT-enabled services delivered through Mode 3 for all the nine categories were valued at USD 23.1 billion. Close to 80% of the total ICT-enabled services delivered through Mode 3 was accounted for by computer services; engineering services had a share of almost 9% and information services, a share of 8%.
- The total business in ICT-enabled services of Indian-owned foreign affiliates including services to India was close to USD 32 billion. Excluding value of services to India, business in ICT-enabled services of Indian-owned foreign affiliates was valued at almost USD 31 billion. More than 70% of ICT business of overseas subsidiaries was accounted for by services delivered in host countries and 22% by exports to other countries. Close to 80% of local business of overseas subsidiaries was in computer services.

1

*I*NTRODUCTION



1.1 Background

Rapid transformation in the nature of services traded coupled with increased disintegration of production services has led to a growing demand for timely and reliable disaggregated level data on trade in ICT-enabled services from countries exporting these services. India, with its rapid growth in the ICT sector coupled with the dominant position it holds in world services trade, is no exception to this demand. The Department of Commerce in the Government of India has therefore been making sustained efforts not only to improve the data availability of ICT-enabled services but also develop an institutional mechanism that would accurately capture the country's disaggregated services trade data by partner country and mode of delivery of services. Launching of the second pan-India survey on export of ICT-enabled services was an important step in this direction.

1.2 Objective of the survey

To meet the increasing demand for disaggregated data on ICT-enabled services, the United Nations Conference in Trade and Development (UNCTAD) in 2014 started working on developing a proper classification and a methodology for measuring trade in ICT-enabled services. The efforts of UNCTAD culminated in a definition of ICT-enabled services and the 10 categories of services were classified as ICT-enabled services as mentioned in Box 1.1.

Following the UNCTAD definition of ICT-enabled services and potential ICT-enabled services, Directorate General of Commercial Intelligence & Statistics (DGCIS) under the Ministry of Commerce and Industry, in technical collaboration with UNCTAD launched a pan-India survey in July 2017 to collect information on India's exports of ICT-enabled services by partner country and mode of delivery of service for the financial

Box 1.1: Definition of ICT-enabled services

ICT-enabled services are services delivered remotely over ICT networks.

Potentially ICT-enabled services: (i) Telecommunications, (ii) Computer Services (including computer software), (iii) Sales and marketing services, not including trade and leasing services, (iv) Information services, (v) Insurance services, (vi) Financial services, (vii) Management, administration and back office services, (viii) Licensing services, (ix) Engineering, related technical services and R&D and (x) Education and training services.

According to the definition followed, services delivered through Mode 1 are essentially 'ICT-enabled' services while those delivered through Mode 1, Mode 2 & 4 are 'potential ICT-enabled' services.

year 2016-17. Non-availability of data for all the categories of services included in the definition of ICT-enabled services in the Balance of Payment (BoP) data published by the Reserve Bank of India, non-availability of data by partner country and mode of delivery of services from the BoP data and the dominance of ICT-enabled services in India's services export influenced the decision. However, in view of the complexity involved in collection of information for insurance sector as the usual concept of mode of supply does not appropriately apply to this sector, insurance services had been kept out of the purview of this survey.

The 2016-17 survey covered around 2500 enterprises distributed across the 9 categories mentioned above. The report on India's Export of ICT-enabled Services 2016-17 was released in June 2018.

With the report of the first survey widely acclaimed in all quarters, DGCIS, in consultation with the Department of Commerce decided to launch the second survey

on Export of ICT-enabled services to capture data in respect of financial Year 2017-18.

1.3 Features of the survey

1.3.1 Geographical Coverage: The survey covered the entire Union of India.

1.3.2 Sampling Units: Enterprise-based approach has been adopted and information covering all establishments spread across the country was collected from the corporate headquarters of the establishments. All enterprises in the sampling frame were divided into two major types, namely, census and sample sector units.

1.3.3 Sampling Design: While the census sector units were covered on a 100 per cent basis, the sample units have been chosen following Simple Random Sampling without Replacement (SRSWOR).

1.3.4 Survey format: Several modifications had been made in the schedule of 'Exports of ICT – Enabled Services – 2017-18' as compared to the schedule canvassed for 2016-17. Modifications included:

(a) Break up of employment figures by offshore and on-site employment.

(b) Country list revised based on data collected in 2016-17 survey and additional countries included.

(c) Separate block introduced to provide a breakup of the estimate of export of ICT enabled services by State/UT.

(d) As per the General Agreement on Trade in Services, there are four modes through which international trade in services take place. (Box 1..2)

The services data released by RBI as a part of the BOP compilation does not provide mode wise information on delivery of services. The format used for the 2016-

Box 1.2: GATS modes of supply of Services

Mode 1: *Cross-border supply* – services supplied from the territory of one country into the territory of another,

Mode 2: *Consumption abroad* - services supplied in the territory of a nation to the consumers of another,

Mode 3: *Commercial Presence* - services supplied through any type of business or professional establishment of one country in the territory of another and

Mode 4: *Presence of natural person* - services supplied by nationals of a country in the territory of another.

17 survey on export of ICT-enabled services had provision for capturing services delivery through Mode 1, Mode 2 and Mode 4. A separate block had been introduced in the 2017-18 round of the survey to capture information on services delivered through subsidiaries/associates abroad (Mode 3) for the different categories of services.

(e) Separate block had been introduced to collect data on sub-categories for some of the important services categories-computer services, sales and marketing services, information services, Management, administration and back office services and Engineering, related technical services & R&D.

An excel format of the questionnaire had also been designed and the same was made available through the website of DGCIS.

1.3.5 Reference Period: The estimates presented in this report are based on the information collected for the financial year 2017-18, i.e., April 2017 to March 2018.

1.3.6 Legal framework: The survey was conducted under the legal framework of Collection of Statistics Act (CSA) 2008 that makes it obligatory on part of the respondents to furnish the information within the prescribed time limit. CSA 2008 also guarantees confidentiality of the information provided by the respondents.

1.3.7 Mode of collection of information: The selected enterprises were issued notices under CSA 2008 and encouraged self-compilation on the basis of the guidelines issued. The filled-in format was to be submitted to DGCIS within one month of the receipt of the notice. Reminders were issued and the non-responding units followed up telephonically. Guidance for compilation and submission of information had been provided mainly through e-mail and telephone wherever required.

1.3.8 Contents of this report: The pan – India survey

on export of ICT-enabled services 2017-18 covered 2851 enterprises distributed across the 9 categories of services. The results of the survey are presented in five chapters. Chapter one is a brief introduction of the survey highlighting the background and objectives of the survey. The concepts and definitions used in the survey have been elaborated in Chapter two while Chapter three briefly describes the methodology followed for collection of information in the survey. The findings of the survey are discussed in Chapter four. Chapter five comprises of observations on survey findings, limitations and a few recommendations.

The detailed tables are included in Annexure I while the questionnaire used in the survey is provided in Annexure II. The list of 2-digit ISIC codes is given in Annexure III. The composition of the geographical regions used in the report is provided in the Annexure IV. The detailed constituents of different service categories are given in Annexure – V.

2

CONCEPTS, DEFINITIONS AND CLASSIFICATION



2.1 Exports of services:

Exports of services are sales of services provided to non-resident importers. They correspond to services for which payment is made directly to your enterprise by a non-resident entity (including a foreign affiliate of your enterprise). Exports include services provided by your enterprise or its employees working abroad, or some other resident entity on whose behalf your enterprise receives payment. Exports exclude services that are provided to non-residents by your enterprise and paid for through other unrelated resident entities.

They correspond to services for which payment is made directly to an enterprise by a non-resident entity (including a foreign affiliate of the enterprise). Exports include services provided by an enterprise or its employees working abroad, or some other resident entity on whose behalf the enterprise receives payment. Exports exclude services that are provided to non-residents by the enterprise and paid for through other unrelated resident entities.

2.2 ICT-enabled services:

UNCTAD has defined ICT-enabled services as "services delivered remotely over ICT networks". As in 2016-17, this definition has been used for the purpose of collection of information in the present survey. The following 10 categories of services are identified as potentially ICT-enabled services:

- i. Telecommunications
- ii. Computer Services (including computer software)
- iii. Sales and marketing services, not including trade and leasing services
- iv. Information services
- v. Insurance services

- vi. Financial services
- vii. Management, administration and back office services
- viii. Licensing services
- ix. Engineering, related technical services and R&D
- x. Education and training services.

2.2.1 Telecommunications: Telecommunications include: (i) Telephony and other telecommunications services; (ii) Internet telecommunications services; (iii) Broadcasting services.

2.2.2 Computer Services (including computer software): Computer services (including computer software) include: (i) Licensing services for the right to use computer software; (ii) Software downloads; (iii) Software originals; (iv) On-line games; (v) On-line software; (vi) IT consulting and support services; (vii) Hosting and information technology (IT) infrastructure provisioning services; (viii) IT infrastructure and network management services; (ix) Maintenance and repair services of computers and peripheral equipment; (x) IT design and development services for applications; (xi) Other education and training services N.E.C.

2.2.3 Sales and Marketing Services, not including trade and leasing services: Sales and marketing services, not including trade and leasing services, include: (i) Advertising services and provision of advertising space or time; (ii) Market research and public opinion polling services; (iii) Advertising and related photography services; (iv) Convention and trade show assistance and organization services.

2.2.4 Information Services: Information services include: (i) Audiovisual and related services; (ii) On-line audio content; (iii) On-line video content; (iv) Radio and television broadcast originals; (v) Home programme

distribution services, basic programming package; (vi) Home programme distribution services, discretionary programming package; (vii) Home programme distribution services, pay per view; (viii) Radio and television channel programmes; (ix) On-line books; (x) Human health services; (xi) On-line gambling services; (xii) News agency services; (xiii) Library and archive services; (xiv) Original compilations of facts/information; (xv) On-line newspapers and originals; (xvi) On-line directories and mailing lists; (xvii) On-line adult content; (xviii) Web search portal content; (xix) Other on-line content n.e.c.; (xx) All other professional, technical and business services n.e.c..

2.2.5 Financial Services: Financial services include: (i) Investment banking services; (ii) Services auxiliary to financial services other than to insurance and pensions; (iii) Services of holding financial assets; (iv) Other financial services, except investment banking, insurance services and pension services; (v) Central Banking services; (vi) Deposit services; (vii) Credit-granting services; (viii) Financial leasing services; (ix) Pension fund management services; (x) Individual pension services; (xi) Group pension services.

2.2.6 Management, Administration and Back Office Services: Management, administration and back office services include: (i) Legal services; (ii) Accounting, auditing and bookkeeping services; (iii) Tax consultancy and preparation services; (iv) Insolvency and receivership services; (v) Management consulting and management services; (vi) Business consulting services; (vii) Other management services, except construction project management services; (viii) Employment services; (ix) Investigation and security services; (x) Travel arrangements, tour operator and related services; (xi) Credit reporting services; (xii) Collection agency services; (xiii) Telephone-based support services; (xiv) Combined office administrative services;

(xv) Specialized office support services; (xvi) Other information and support services n.e.c..

2.2.7 Licensing Services: Licensing services include: (i) Licensing services for the right to use trademarks and franchises; (ii) Licensing services for the right to use R&D products; (iii) Licensing services for the right to use entertainment, literary or artistic originals; (iv) Licensing services for the right to use mineral exploration and evaluation; (v) Licensing services for the right to use other intellectual property products; (vi) Licensing services for the right to use databases.

2.2.8 Engineering, related Technical Services and R&D: Engineering, related technical services and R&D include: (i) Research and experimental development services in natural sciences and engineering; (ii) Research and experimental development services in social sciences and humanities; (iii) Interdisciplinary research and experimental development services; (iv) Industrial design services; (v) Research and development originals; (vi) Design originals; (vii) Technical testing and analysis services; (viii) Architectural services, urban and land planning and landscape architectural services; (ix) Engineering services; (x) Surface surveying and map-making services; (xi) Weather forecasting and meteorological services; (xii) Scientific and technical consulting services n.e.c.; (xiii) Publishing, printing and reproduction services; (xiv) Photographic processing services; (xv) Translation and interpretation services; (xvi) Restoration and retouching services of photography; (xvii) Other photography services; (xviii) Interior design services; (xix) Other specialty design services; (xx) Drafting services, n.e.c..

2.2.9 Education and Training Services: Education and training services include: (i) Pre-primary education

services; (ii) Primary education services; (iii) Secondary education services; (iv) Post-secondary non-tertiary education services; (v) Tertiary education services; (vi) Educational support services; (vii) Cultural education services; (viii) Sports and recreation education services; (ix) Other education and training services, n.e.c..

As Insurance services have been kept out of the purview of the survey, the different sub-categories of services that constitute insurance services have not been shown separately.

2.3 Basis of reporting:

The value of exports figures were reported on accrual basis irrespective of whether or not the amount had been received. Transactions were to be reported on a gross basis. Expenses incurred in the course of rendering the service, e.g. commissions, other services, etc., were to be included.

2.4 Currency of reporting:

All the value figures were reported in Indian Rupee only. The enterprises were advised to convert foreign currencies to Indian Rupee (INR) using average exchange rate for the period of reference.

2.5 Principal Activity of the enterprise:

For reporting principal activity of the enterprise, the International Standard Industrial Classification (ISIC), Revision 4 at 2-digit level have been used. The complete list of all 2-digit ISIC codes is given in Annexure III.

2.6 Composition of regions:

The composition of the geographical regions used in the report is provided in the Annexure IV.

3

*M*ETHOD OF DATA COLLECTION



3.1 Preparation of Sampling Frame:

Unlike in developed and some of the developing countries, business register is not available in India. Information on units engaged in export of ICT-enabled services had therefore been collected from multiple sources to prepare sector-specific frames. Attempts to get the Goods and Services Tax registration data from the Goods and Services Tax Network (GSTN) to prepare sectoral frames had not been successful.

Sampling frame used in the 2016-17 survey had been updated to capture the latest changes in addresses

and contact details of the existing units. Some basic information like name of unit, address, contact details, website address etc. of the newly added units were collected from several agencies as listed in Table 3.1 to prepare sector specific frames.

Although included in the list of ICT-enabled services, separate frames for Financial Services and Education and Training Services were not prepared. Information in respect of financial and education and training services was therefore restricted to only such units that reported exports under these two categories of services in combination with the other seven categories.

Agency	Sector/Category of Service
Reserve Bank of India (RBI): Information collected under International Transaction Reporting System	All services
Telecom Regulatory Authority of India (TRAI)	Telecom
Telecom Equipment and Services Export Promotion Council (TEPC)	
NASSCOM, Software Technology Parks of India (STPI),	All except education
Software Technology Park of India	All services
NSDL Data Base Management Limited	All services

3.2 Census & Sample Units:

All the units of the sampling frame have been classified

into two categories, namely, 'census' and 'sample' based on the following criterion.

Category of service	Criteria followed for dividing into census/sample
Telecommunications, Engineering, related technical services and R&D	Enterprises are ranked in descending order of value of exports (as provided by the RBI from ITRS database) and the enterprises (starting from the highest contributor) having a cumulative contribution of 90% to the total value of exports was regarded as 'census' units. The remaining enterprises were included in the 'sample' sector.
Computer services (including computer software), Sales and marketing services, not including trade and leasing services, Information services, Management, administration and back office services, Licensing services	Top 100 enterprises from NASCOMM's member list having a cumulative contribution of 70% to the total value of exports were included in 'census' sector. Apart from this, STPI and SEZ units which were not members of NASCOMM were included in the 'census' category. The remaining enterprises were included in the 'sample' sector.

3.3 Selection of samples:

While all the units belonging to census sector were covered in the survey, units from the sample sector were selected with Simple Random Sampling without Replacement (SRSWOR) technique. The selected units were issued notices under CSA 2008 to submit information in the format designed for the survey.

3.4 Respondents:

Since the type of information intended to be collected in the survey is not always available in individual establishments, enterprise-based approach was adopted and information collected from corporate headquarters of the establishments. This reduced the requirement to collect data from multiple sources as well as savings in cost and time.

3.5 Composition of Format:

The format prepared used in the 2016-17 ICT survey had been modified and three additional Sections to capture information on subsidiaries, sub-category wise export and state wise export of services introduced in 2017-18. The questionnaire contained the following seven Sections:

- a. **Section A:** Identification particulars of the service provider – has provision for collection of information on name, address, telephone number etc. along with the respondent details of the organization;
- b. **Section B:** General Information – for reporting

number of persons employed along with percentage break-up of male & female employees, total turnover from services as well as other than services, total value of exports of services, principal activity of the enterprise etc.;

- c. **Section C:** Services exports to be included – for identification of the potential ICT-enabled services exported by the enterprise;

- d. **Section D:** Details of services exports –specifically designed for reporting information on exports of each category of services along with percentage of exports delivered through Mode 1, Mode 2 and Mode 4. This section has also provision for showing value of exports of services for a pre-defined group of partner countries along with percentage of Mode 1 (ICT-enabled) exports to each trading partner.

- e. **Section E:** Information on Subsidiaries/Associates abroad - specifically designed for reporting information on Mode 3 export of services.

- f. **Section F:** Break-up of Exports of ICT-enabled services by Sub-categories - for capturing sub-category wise value of exports of potential ICT-enabled services.

- g. **Section G:** Break-up of Export of ICT-enabled services by State/UT - for capturing state-wise contribution towards export of ICT-enabled services export of the enterprise.

Annexure II provides the questionnaire used in the survey.

4

*S*URVEY FINDINGS



As in the case of 2016-17 survey, the 2017-18 survey focused on collection of information on India's export of potential ICT-enabled services by 9 different categories along with break-up by partner country. In addition, the survey covered supply of services by all the four modes, namely, Mode 1: supply of services to foreign entities/persons from India over internet, telephone or other ICT networks; Mode 2: supply of services to foreign entities/persons, temporarily in India, Mode 3: services supplied through affiliates established abroad and Mode 4: on-site supply of services by deputing employees abroad.

Insurance services had been kept outside the purview of this survey. Although included in the format of data collection, the 2017-18 survey did not adequately capture units providing financial and education services. As mentioned in Para 3.1, institutions exclusively dedicated to financial and educational services were not covered in this survey. Information in respect of financial and education and training services relates to such units that reported exports under these two categories of services in combination with other categories. This is likely to underestimate the value of export in these two categories of services.

A possible solution to overcome this problem of coverage could have been to keep financial and education services out of the tabulation plan and restrict the compilation of 2017-18 survey data to the remaining seven major categories of ICT-enabled services. The other alternative was to tabulate the entire data collected in the survey including the two categories – financial and education services and caution the users that the value of financial and education services export estimated in 2017-18 are underestimates as these are the value of financial and education services exported by IT units rather than entities exclusively providing financial and education services. However, instead of discarding the data, the second approach was adopted in

preparing the report. The figures for financial and education services in the 2017-18 survey are not comparable with the 2016-17 data and need to be used with caution.

As in the 2016-17 survey, the enterprises were asked to report the value of exports in Indian Rupee (INR) only. However, for the purpose of comparability, figures in US dollar (USD) have also been published in the report. These figures have been derived using the annual average Indian Rupee – US Dollar exchange rate as published by the RBI. The exchange rate for the period April 2017 to March 2018 was 1 USD = 66.5878 INR.

4.1 Export of potential ICT-enabled services by category and mode of supply:

India's total exports of potential ICT-enabled services (excluding insurance services and the limited coverage of financial services and education services) during financial year 2017-18 were valued at USD 119.5 billion (INR 7954 billion). Mode 1 or ICT-enabled services at USD 96.7 billion contributed to 81% of the exports of potential ICT-enabled services while Mode 4 at USD 22.6 billion contributed around 19%. Supply of potential ICT-enabled services through Mode 2 was USD 0.1 billion only (see Figure 4.1 and Table 4.1).

Figure 4.1: Exports of potential ICT-enabled services in 2017-18

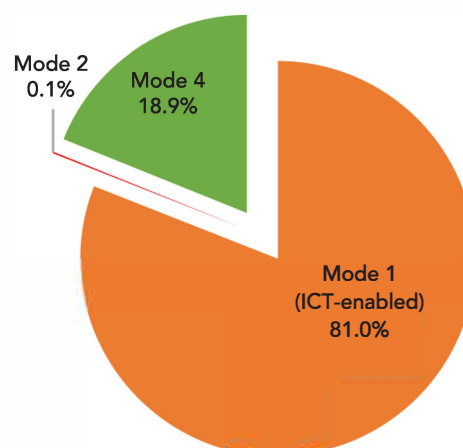


Table 4.1: Exports of ICT-enabled services by category and modes of supply during 2017-18

Sl. No.	Category of Service	Value of Exports (in INR Billion)				Value of Exports (in USD Million)			
		Mode 1	Mode 2	Mode 4	Total	Mode 1	Mode 2	Mode 4	Total
1	Telecommunications	198.1	0.1	9.3	207.5	2,974.5	0.9	140.2	3,116
2	Computer Services (including Computer Software)	4,041.8	1.0	1,160.8	5,203.6	60,698.8	14.5	17,433.0	78,146
3	Sales and marketing services, not including trade and leasing services	38.2	4.4	0.1	42.7	573.2	66.0	1.9	641
4	Information Services	359.6	0.4	97.0	457.0	5,399.7	6.7	1,456.3	6,863
5	Financial services	44.6	2.4	0.3	47.3	670.0	35.4	4.7	710
6	Management, administration and back office services	977.5	0.4	19.4	997.3	14,679.8	6.2	290.8	14,977
7	Licensing services	16.5	0.0	0.0	16.5	248.0	0.0	0.0	248
8	Engineering, related technical services and R&D	761.5	0.6	217.1	979.1	11,435.5	9.0	3,259.8	14,704
9	Education and training services	3.1	0.1	0.0	3.2	47.2	1.5	0.0	49
10	All	6,440.8	9.3	1,504.0	7,954.2	96,726.8	140.3	22,586.7	1,19,454

Note: (i) The sum of the components in the tables may marginally differ from totals, due to the effect of rounding off.
(ii) The INR figures have been converted to USD using the average annual exchange rate of 1 USD = 66.5878 INR for the period April 2017 to March 2018.
(iii) Mode 1: to foreign entities/persons from office in India over internet, telephone or other ICT networks; Mode2: to foreign entities/persons temporarily in India; Mode 4: through on-site services by deputing employees abroad.

Table 4.2: Export of potential ICT-enabled services 2017-18 vis-à-vis 2016-17

Category of Service	Value of Exports (in million USD)		Growth (%)
	2016-17	2017-18	
Telecommunications	2,783	3,116	12.0
Computer services (including computer software)	65,117	78,146	20.0
Sales and Marketing Services (not including trade and leasing services)	670	641	-4.3
Information Services	6,564	6,863	4.6
Management, Administration and Back Office Services	13,941	14,977	7.4
Licensing Services	344	248	-27.9
Engineering, related Technical Services and R&D	11,737	14,704	25.3
Others (including Financial, Education and Training Services)*	1,908	759	-60.22*
Total	103,063	119,454	15.9

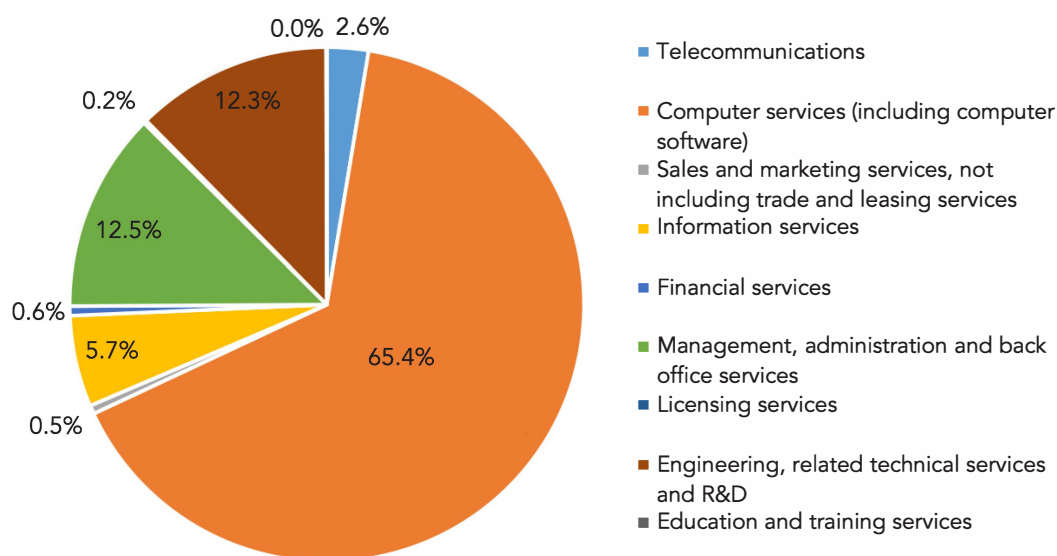
* Due different sampling frame coverage for Financial, Education and Training Services in 2017-18 w.r.t. that of 2016-17, the figures of 2017-18 and 2016-17 are strictly not comparable.

Even with the limited coverage in financial and education services, export of potential ICT-enabled services in dollar terms registered a growth of about 16% over export of USD 103.1 billion recorded in 2016-17 (See Table 4.2).

The higher export in potential ICT-enabled services in 2017-18 over 2016-17 was mainly accounted for by 20% growth in export of computer services from USD 65.1 billion in 2016-17 to USD 78.2 billion in 2017-18, 25% growth in Engineering services from USD 11.7 billion in 2016-17 to USD 14.7 billion in 2017-18, 7.4% growth in export of Management and back office services from USD 13.9 billion in 2016-17 to USD 14.9 billion in 2017-18 and 12% growth in Telecommunication from USD 2.7 billion in 2016-17 to USD 3.1 billion in 2017-18. Export of Sales and Marketing services and Licensing services declined by 4.3% and 27.9% in 2017-18 as compared to 2016-17.

Computer services (including computer software) had the highest share of about 66% in export of potential ICT-enabled services followed by Management, administration and back office services (share of about 13%) and Engineering, related technical services and R&D (share of about 12%). Contribution of other service categories like Sales and Marketing, Licensing and Education and training services to export of potential ICT-enabled services were negligible (see Figure 4.2 and Table 4.1). While the share of computer services (including computer software) in potential ICT-enabled services export increased by 3% in 2017-18 as compared to 2016-17, there was a 1% decline in the share of Engineering, related technical services and R&D in 2017-18 when compared to 2016-17. Share of Management, administration and back office services remained the same in 2016-17 and 2017-18.

Figure 4.2: Exports of potential ICT-enabled services in 2017-18



A similar pattern was noticed in export of ICT-enabled (Mode 1) services. Export of Computer services had the highest share of 63% followed by Management, administration and back office services with a share of about 15% and Engineering, related technical services and R&D with a share of about 12% (See Figure 4.3 and Table 4.1).

Mode 1, i.e., ICT-enabled delivery of services, with a share of about 81% was the predominant mode of

supply for all categories of potential ICT-enabled services in 2017-18. Although there is no overall change in share of Mode 1 to total export of potential ICT-enabled services in 2016-17 and 2017-18, the share of Mode 1 in export of Computer services increased from 73% in 2016-17 to 78% in 2017-18 and the share of Engineering, related technical services and R&D declined from 82% in 2016-17 to 78% in 2017-18. 98% of export of Management, administration and back office services had been delivered through Mode 1.

Figure 4.3: Exports of ICT-enabled (Mode 1) services in 2017-18

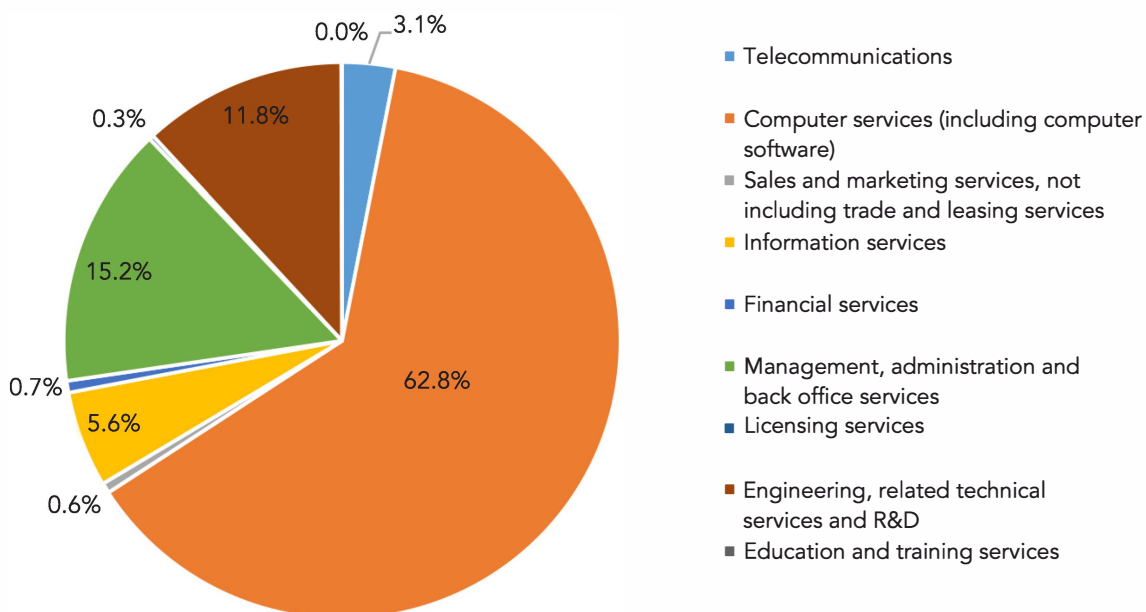


Figure 4.4: Exports of Potential ICT-enabled Services by Mode of Supply during 2017-18

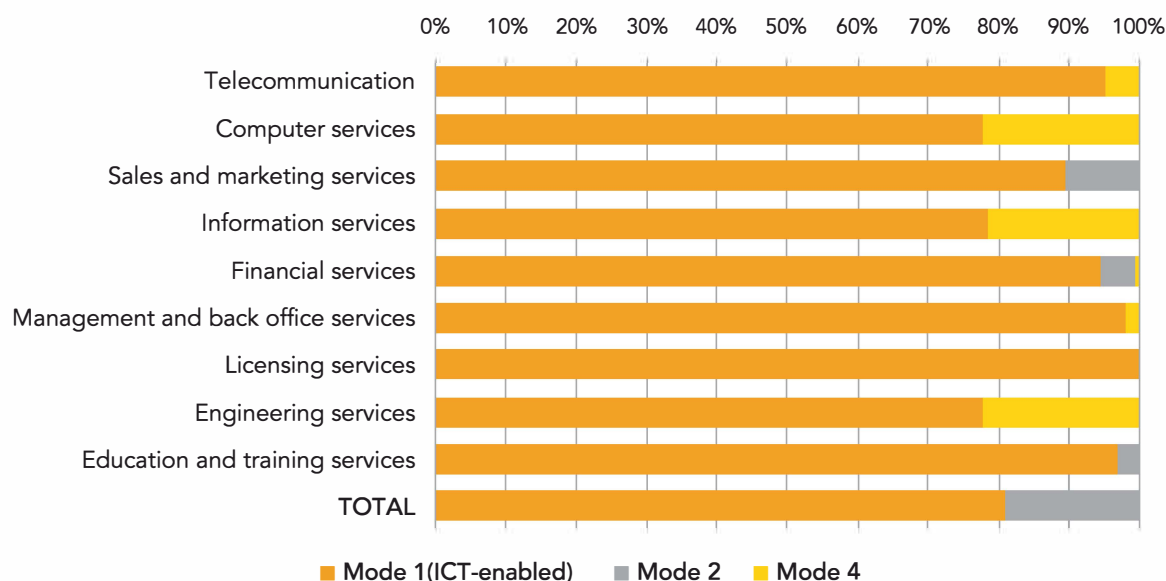


Table 4.3: Percentage share of modes of supply of Exports of ICT-enabled services by category during 2017-18

Category of Service	Mode 1 (ICT-enabled)	Mode 2	Mode 4	Total	Total (in Billion)	
					INR	USD
Telecommunications	95.5	0.0	4.5	100.0	207.5	3.1
Computer services	77.7	0.0	22.3	100.0	5,203.6	78.1
Sales and marketing services	89.4	10.3	0.3	100.0	42.7	0.6
Information services	78.7	0.1	21.2	100.0	457.0	6.9
Financial services	94.3	5.0	0.7	100.0	47.3	0.7
Management and back office services	98.0	0.0	1.9	100.0	997.3	15.0
Licensing services	100.0	0.0	0.0	100.0	16.5	0.2
Engineering services	77.8	0.1	22.2	100.0	979.1	14.7
Education and training services	96.9	3.1	0.0	100.0	3.2	0.0
Total	81.0	0.1	18.9	100.0	7,954.2	119.5

Mode 2 had a share of only 0.1% in total export of potential ICT-enabled services. Share of Mode 2 in export of Sales and marketing services however increased from less than 1% in 2016-17 to 10% in 2017-18.

Mode 4 contributed to almost 19% of export of potential ICT-enabled services. While Mode 4 had a 22% share in export of Engineering and R&D services and Computer services and a 21% share in export of

Information services, it had a nominal share in export of other services (see Figure 4.4 and Table 4.3). The decline in share of Mode 4 from 27% in 2016-17 to 22% in 2017-18 for computer services had been compensated by increase in share of Mode 1 from 73% to 78%. The reverse has happened in case of Engineering services where decline in the share of Mode 1 from 82% in 2016-17 to 78% in 2017-18 had seen increase in share of Mode 4 from 17% in 2016-17 to 22% in 2017-18.

4.2 Exports of potential ICT-enabled services by continents and countries:

In 2017-18, America was the largest destination of India's exports of potential ICT-enabled as well as ICT-enabled services with about 56% of both potential ICT-enabled services and ICT-enabled services (Mode 1) exported to this destination during the year. Europe was the second largest destination with 25% of India's total exports of potential ICT-enabled and about 26% of total exports of ICT-enabled services. The third important continent for India's export of potential ICT-enabled services was Asia contributing to about 11% of potential ICT-enabled and 10% of ICT-enabled services (see Figures 4.5, 4.6 and 4.7).

In 2016-17 also, America had been the largest destination with 56% each of India's export of potential ICT enabled services and ICT enabled services exported to this destination. Europe was the second largest destination accounting for 25% of India's total export of potential ICT-enabled and 26% of total exports of ICT-enabled services during the year. Thus, the share of America in India's export of potential ICT-enabled services and ICT-enabled services has remained unchanged in 2017-18 when compared to 2016-17. Similarly, the share of Europe in India's export of ICT-enabled services which remained the same in 2016-17 and 2017-18.

Figure 4.5: Exports of potential ICT-enabled services in 2017-18

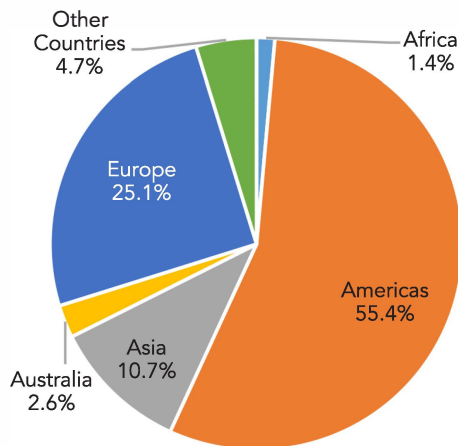


Figure 4.6: Exports of ICT-enabled (Mode 1) services in 2017-18

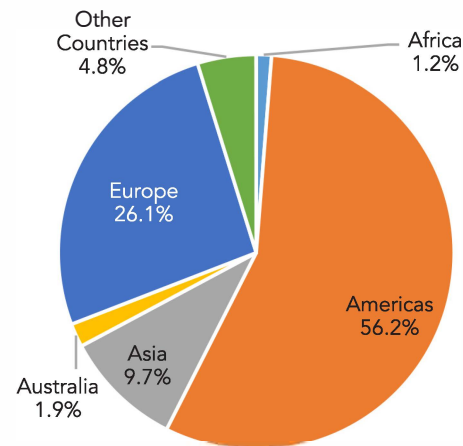
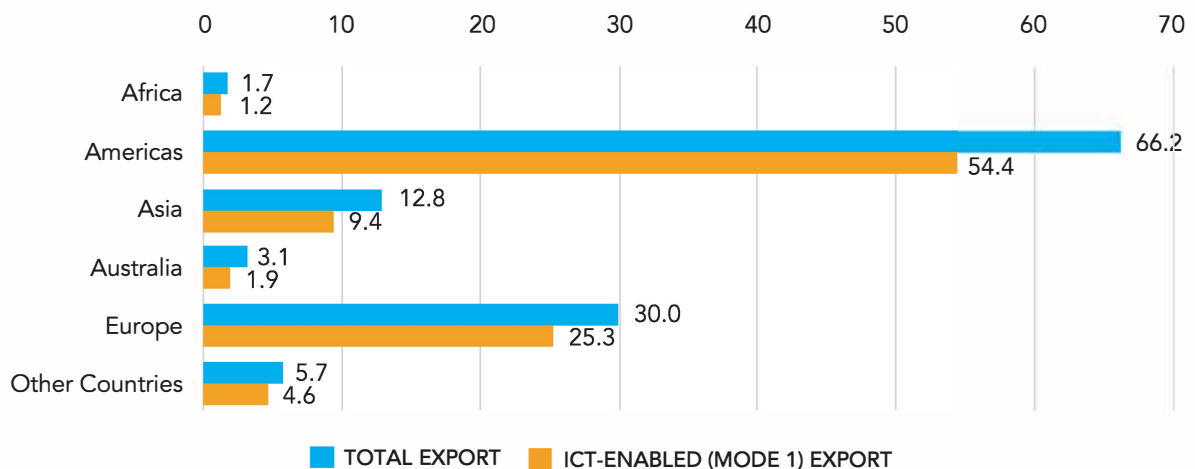


Figure 4.7: Continent wise Total and ICT-enabled export of services (USD Billion) in 2017-18



However, share of Asia in export of potential ICT-enabled services has reduced from 14% in 2016-17 to 11% in 2017-18 and in case of ICT-enabled services from 13% in 2016-17 to below 10% in 2017-18. Africa had a share of less than 2% in India's export of potential

ICT-enabled services in 2017-18.

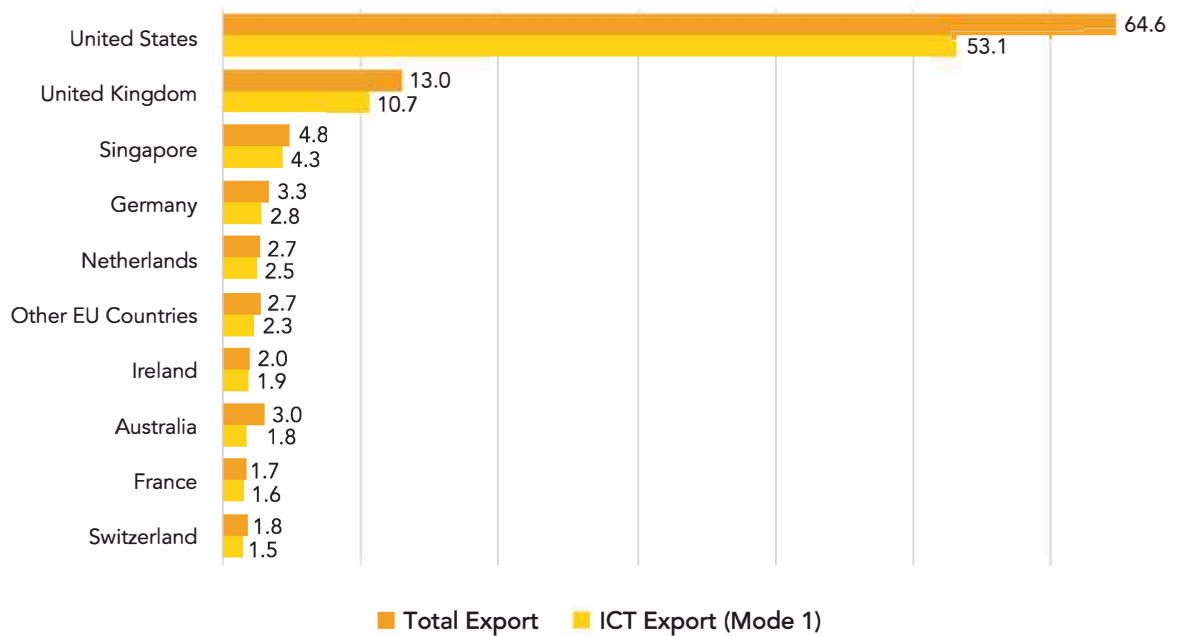
The United States (US) was the largest destination for India's export of potential ICT-enabled as well ICT-enabled (Mode 1) services in 2017-18.

Table 4.4: Exports of ICT-enabled Services by Continents and Countries

Continent	Value of Exports (in INR Billion)		Value of Exports (in USD Billion)		
	Country	Total	ICT-enabled	Total	ICT-enabled
Africa		114.09	80.30	1.71	1.20
	Mauritius	31.00	29.58	0.47	0.44
	Other African Countries	37.61	21.27	0.56	0.32
	South Africa	45.48	29.45	0.68	0.44
Americas		4,409.19	3,622.65	66.22	54.40
	Canada	89.93	71.31	1.35	1.07
	Latin America*	21.11	15.55	0.32	0.23
	United States	4,298.15	3,535.79	64.55	53.10
Asia		852.93	626.13	12.81	9.40
	Hong Kong	36.70	33.96	0.55	0.51
	Japan	66.53	56.47	1.00	0.85
	Other East Asian Countries*	98.77	85.27	1.48	1.28
	Other West Asian Countries*	79.04	53.92	1.19	0.81
	Singapore	321.44	287.81	4.83	4.32
	South Asia*	138.94	35.44	2.09	0.53
	UAE	111.51	73.26	1.67	1.10
Australia		205.80	124.02	3.09	1.86
	Australia	198.81	119.98	2.99	1.80
	New Zealand	6.99	4.04	0.10	0.06
Europe		1,994.51	1,681.76	29.96	25.25
	France	112.65	105.66	1.69	1.59
	Germany	217.99	186.07	3.27	2.79
	Ireland	129.82	125.85	1.95	1.89
	Luxemburg	10.90	8.93	0.16	0.13
	Netherlands	179.63	163.60	2.70	2.46
	Other EU Countries	180.79	151.83	2.72	2.28
	Other European Countries*	85.18	57.85	1.28	0.87
	Spain	11.35	9.97	0.17	0.15
	Sweden	80.36	63.20	1.21	0.95
	Switzerland	118.28	99.54	1.78	1.49
	United Kingdom	867.56	709.26	13.03	10.65
Other Countries		377.62	308.52	5.67	4.63
	Other Country	377.62	308.52	5.67	4.63
TOTAL		7,954.15	6,443.40	119.45	96.77

* Country grouping are given in Annexure IV.

Figure 4.8: Top 10 Countries by export (in Billion USD) of ICT-enabled Service during 2017-18



Other important destinations of export of potential ICT-enabled services from India during 2017-18 were the United Kingdom (11%), Singapore (4%), Germany (3%), Australia (3%), Other EU Countries and Netherlands with a share of 2.3% each. (see Figure 4.8 and Table 4.4)

The largest destination for all categories of potential ICT-enabled services in 2017-18 was United States. In 2016-17, except for licensing services, United States was the largest destination for all other potential ICT-enabled services. With about 35% contribution to total exports of licensing services in 2016-17, the United Kingdom was the largest destination for this category followed by West Asia (25%) and the United States (20%). In 2017-18 share of UK was 22% and UAE 7%. Share of US more than doubled from 20% to 42%.

'Computer services (including computer software)' with a share of 66% had been the mainstay of India's potential ICT-enabled services export. Export of computer services to USA had increased from USD 38626 million in 2016-17 to USD 44981 million in 2017-18, a growth of almost 17%. Export to UK also

increased from USD 6393 million in 2016-17 to USD 7967 million in 2017-18, a growth of 25%. Other destinations with positive growth in 2017-18 are Germany, Netherlands and Australia. Exports to Singapore declined from USD 4042 million in 2016-17 to USD 3254 million in 2017-18. Export to South Asia at USD 585 million recorded more than 50% decline in 2017-18.

Other major categories of potential ICT-enabled services exports are Management, administration and back office services (USD 14977 million), Engineering, related technical services and R&D (USD 14704 million), Information services (USD 6863 million) and Telecommunication services (USD 3116 million).

While the largest destination of Management, administration and back office services was US (USD 7926 million) followed by UK (USD 3235 million), Ireland (USD 643 million), Singapore (USD 566 million), Switzerland (USD 266 million) and Other EU countries (USD 460 million), the largest destination for Engineering, related technical services and R&D was US (USD 6457 million) followed by Germany (USD

1014 million), UAE (USD 686 million), UK (USD 539 million), France (USD 508 million), South Asian countries (USD 1418 million), other EU countries (USD 671 million) and other East Asian countries (USD 505 million).

The largest destination for export of Information services was USA (USD 3768 million) followed by UK (USD 655 million), Singapore (USD 285 million), Australia (USD 227 million) and Germany (USD 193 million). The major export destinations of telecommunications services were US (USD 759 million), Sweden (USD 402 million), Singapore (USD 341 million), UK (USD 357 million), Hong Kong (USD 124 million) and other European countries (USD 83 million). More than 60% of India's telecommunication service exports in 2017-18 had been to countries that were also the major export destinations of other ICT-enabled services. Same was the position in 2016-17.

Major export destinations of Sales and marketing services were Singapore (USD 165 million) followed by US (USD 134 million), Switzerland (USD 96 million), UK (USD 52 million) and Ireland (USD 49 million).

4.3 Principal activity of potential ICT-enabled services exporting enterprises:

Computer programming and consultancy and related activities (ISIC code 62), Information service activities

(ISIC code 63) and Office administrative, office support and other business support activities (ISIC code 82) were the top three principal activities reported by the surveyed enterprises. The top three principal activities contributed to almost 81% of exports of potential ICT-enabled services.

Other important principal activities with significant contribution to total exports were Architectural and engineering activities, technical testing and analysis (ISIC code 71), Telecommunications (ISIC code 61), Construction of buildings (ISIC code 41), Activities of head offices; management consultancy activities (ISIC code 70) and other professional, scientific and technical activities (ISIC code 74). These principal activities contributed to another 9 to 10% of India's Potential ICT-enabled services export (see Figure 4.9 and Annexure Table A5).

There is no change in the top three principal activities reported in 2016-17 and 2017-18. However, the share of computer programming and consultancy and related activities in total potential ICT-enabled services exports declined from 64% in 2016-17 to 57% in 2017-18; share of Information service activities saw a jump from 14% in 2016-17 to 21% in 2017-18. Table 4.5 summarizes the share of top 3 principal activities to the exports of different types of potential ICT-enabled services. (Annexure Tables A6, A7)

Figure 4.9: Contribution of Major Principal Activities to Exports of Potential ICT-enabled Services in 2017-18 (Value in Billion USD)

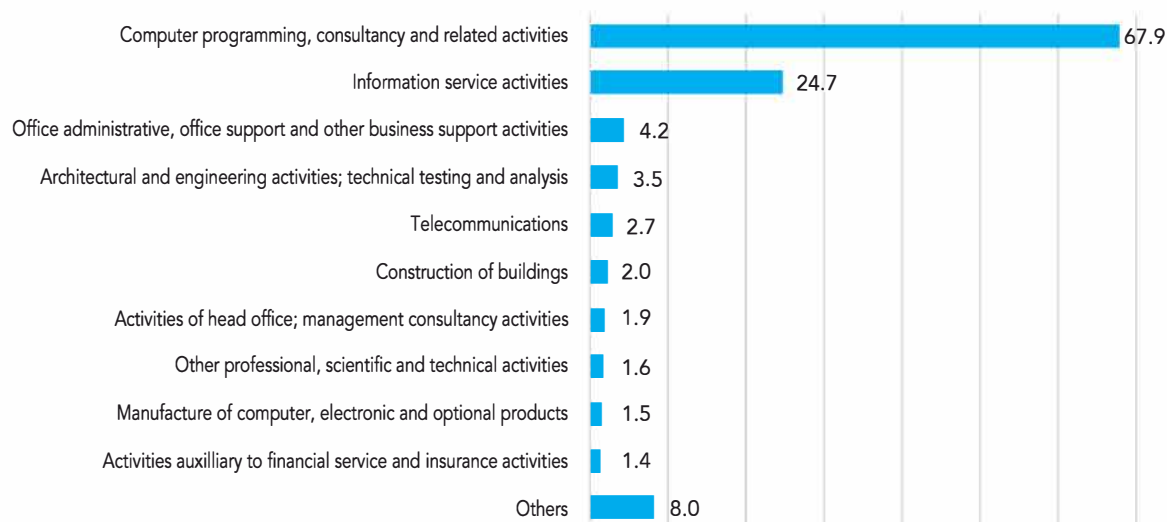


Table 4.5: Principal activities with major contribution to exports of potential ICT-enabled services during 2017-18

ISIC Code (2-Digit)	% contribution to total value of exports										All
	Telecommunications	Computer Services	Sales and Marketing	Information Services	Financial Services	Management and Back Office Services	Licensing Services	Engineering Services	Education Services		
26	3.6	0.8	7.1	0.0	6.6	0.0	0.0	4.5		1.2	
41		0.0	0.2			0.0		13.4		1.7	
58	0.0	0.0	1.7	0.4		0.0		0.1	4.4	0.1	
59		0.0	0.2	2.7		0.0	56.8	0.0		0.3	
60		0.1	3.3	1.7		0.0	29.6			0.3	
61	84.7	0.0	2.4	0.2		0.1		0.1	0.0	2.3	
62	1.9	76.1	35.6	2.0	19.4	33.3	0.9	19.8	0.0	56.9	
63	2.8	19.2	2.9	88.0	11.2	10.7	6.0	12.3	17.4	20.7	
64		0.0	9.7		52.9	6.2				1.2	
70	4.9	1.0	0.4	0.9	8.4	5.1	0.3	0.3	0.0	1.6	
71		0.1	0.9	0.4	0.2	0.2		22.9		2.9	
73	0.0	0.3	10.6	0.0		1.7		0.0		0.4	
74		0.5	13.9	0.9	0.7	2.4	0.3	4.9		1.4	
82		0.5	0.2	0.1		25.1		0.2		3.5	
85			0.0						77.5	0.0	
All	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	

Note : Top 3 principal activities by each service category are highlighted

4.4 Exports of potential ICT-enabled services by enterprise size and turnover:

The survey revealed that around 5% of the potential ICT-enabled services exporting enterprises employed up to 9 employees, 23% employed 10 to 49 persons, 34% employed 50 to 249 persons and 38% enterprises employed more than 250 persons during 2017-18.

While there is no change in the share of enterprises with up to 9 employees in 2016-17 and 2017-18, there is a 2% and 3% increase in enterprises employing 10 to 49 persons and 50 to 249 persons in 2017-18 as compared to 2016-17. Increase in the share of enterprises employing 10 to 49 persons and 50 to 249 persons has been at the expense of large enterprises employing more than 250 persons whose share has declined from 42% in 2016-17 to 38% in 2017-18.

All major service categories saw a decline in the share

of enterprises employing 250 or more persons in 2017-18 barring sales and marketing services which saw an increase in share of large enterprises from 29% in 2016-17 to 30% in 2017-18 and management, administration and back office services whose share of large enterprises in 2017-18 remained the same (56%) as in 2016-17.

Telecommunication and Information services sectors saw about 10% reduction in share of large enterprises in 2017-18. The share of large enterprises in the engineering sector reduced from 54% to 50% and that of computer services from 36% to 34%. However, in the Telecommunications sector, the share of enterprises employing 50 to 249 persons has increased from 28% in 2016-17 to 35% in 2017-18, in information services and engineering services the share of enterprises employing 10 to 49 persons increased from 20 to 27% and 14 to 17% respectively (see Figures 4.10, 4.12 and Annexure Tables A16, A10, A11).

Figure 4.10: Distribution of potential ICT-enabled services exporting enterprise by employment size

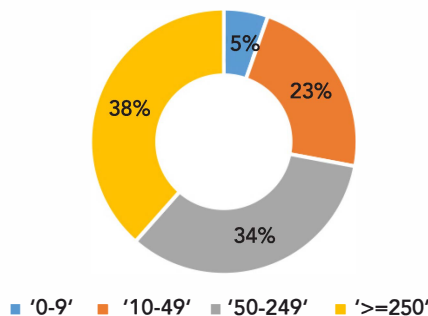


Figure 4.11: Distribution of potential ICT-enabled services exporting enterprise by turnover

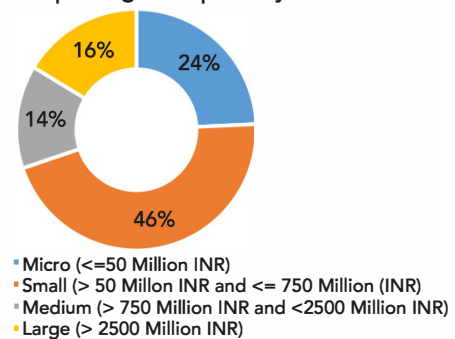


Figure 4.12: Potential ICT-enabled services exporting enterprise by Employment size

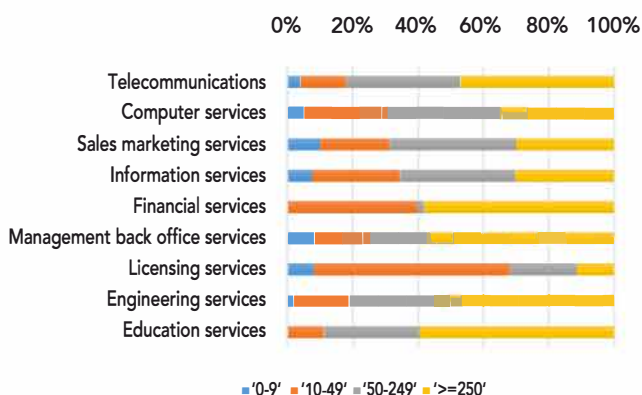
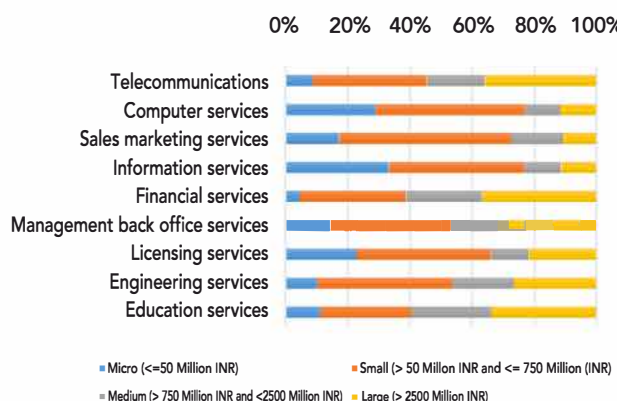


Figure 4.13: Potential ICT-enabled services exporting enterprise by Turnover



Following the same turnover criteria for categorization of enterprises into Micro, Small, Medium and Large as adopted for the 2016-17 survey, in which enterprises with turnover up to INR 50 million had been categorized as *Micro*, enterprises with turnover up to INR 750 million categorized as *Small*, enterprises with turnover up to INR 2500 million categorized as *Medium* and enterprises with turnover exceeding INR 2500 million as *Large*, the 2017-18 survey found that about 24% of the potential ICT-enabled services exporting units belonged to *Micro* category, 46% to *Small* category, 14% to *Medium* category and the remaining 16% were *Large* enterprises (See Figures 4.11, 4.13 and Annexure Tables A9, A12, A13).

Although the number of enterprises with employment sizes 0 – 9, 10 – 49 and 50 – 249 constituted almost 62% of the total number of enterprises, their contribution to potential ICT-enabled services exports during 2017-18 was only 4%. With a share of 38%, large enterprises contributed to 96% of potential ICT-enabled services exports. In 2016-17, large enterprises with its share of 42%, contributed to 96% of total services export. It is interesting to note that the larger enterprises in 2016-17, even after some rationalization of manpower in 2017-18, had been able to retain their share in export of potential ICT-enabled services to 96% (See Figures 4.14, 4.15 and 4.16).

Figure 4.14: SHARE IN EXPORTS OF POTENTIAL ICT-ENABLED SERVICES BY ENTERPRISE SIZE DURING 2017-18

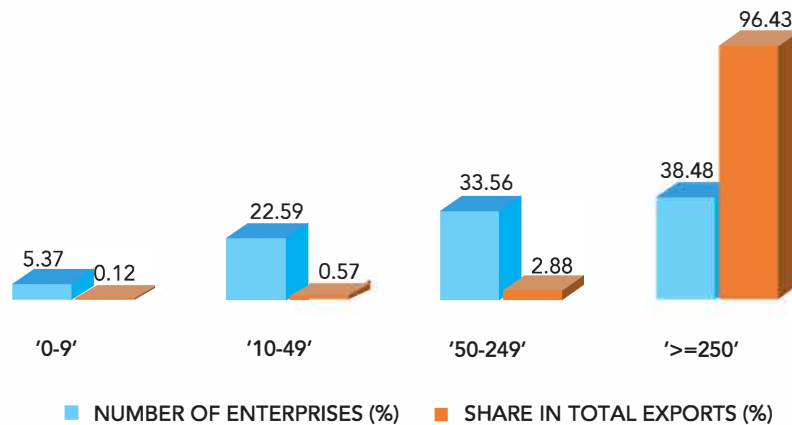
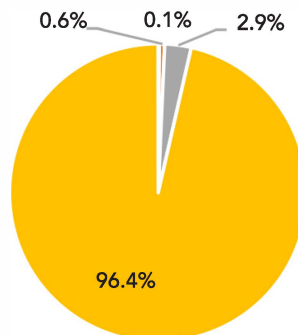
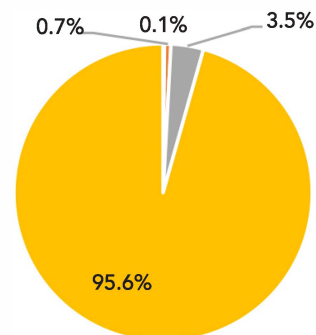


Figure 4.15: Exports of Potential ICT-enabled Services By Enterprise Size



■ 0-9 ■ 10-49 ■ 50-249 ■ >=250

Figure 4.16: Exports of ICT-enabled (Mode 1) Services By Enterprise Size



■ 0-9 ■ 10-49 ■ 50-249 ■ >=250

Based on the turnover criteria as mentioned above, Micro, Small and Medium enterprises with 84% share in the total number of exporting enterprises (Table A9), accounted for only 11% of the total export of potential ICT-enabled services and 13% of ICT-enabled services export during 2017-18 (Table A12 and A13). In 2016-17 the share of Micro, Small and Medium enterprises in export of potential ICT-enabled services and ICT-enabled services was 8% and 10% respectively (see Figures 4.17, 4.18 and 4.19).

4.5 Distribution of employees in potential ICT-enabled services exporting enterprises:

As per the survey, 72% of the persons employed in enterprises exporting potential ICT-enabled services were male and 28% female. Information services had the highest share of 39% female employment followed by management and back office services and computer services both having share of female employment in excess of 30%. Share of female employment was 16% in sales and marketing services and 12% in engineering services. (See Figure 4.21 and Annexure Table A14)

Figure 4.17: EXPORTS OF POTENTIAL ICT-ENABLED SERVICES BY ENTERPRISE TURNOVER DURING 2017-18

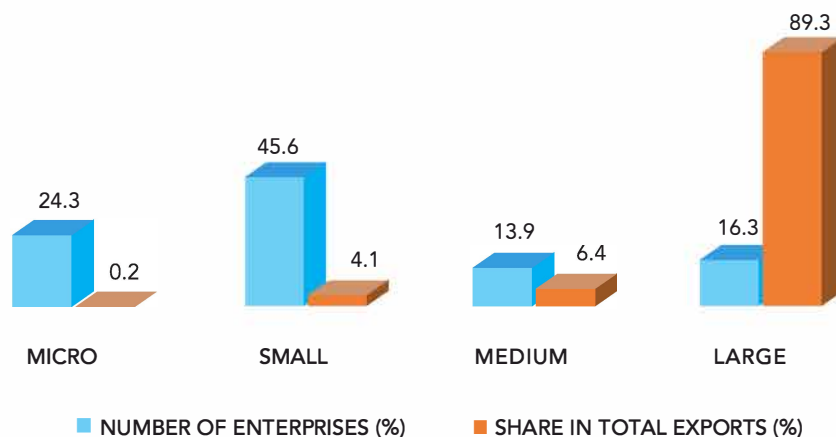


Figure 4.18: Exports of Potential ICT-enabled Services By Enterprise Size Turnover during 2017-18

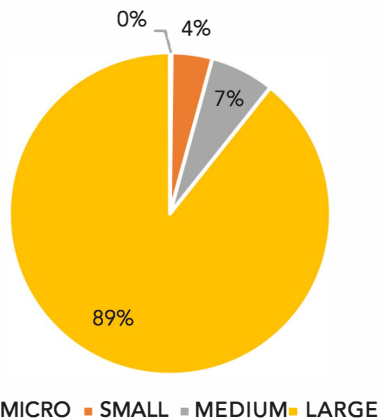
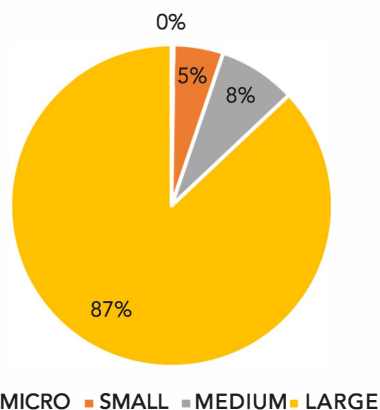


Figure 4.19: Exports of ICT-enabled (Mode 1) Services By Enterprise Size Turnover during 2017-18



Micro (<= 50 Million INR), Small (> 50 Million INR and <= 750 Million INR), Medium (> 750 Million INR and <= 2500 Million INR), Large (> 2500 Million INR)

Figure 4.21: Percentage of Male & Female Employment by Major Service Category of Enterprises

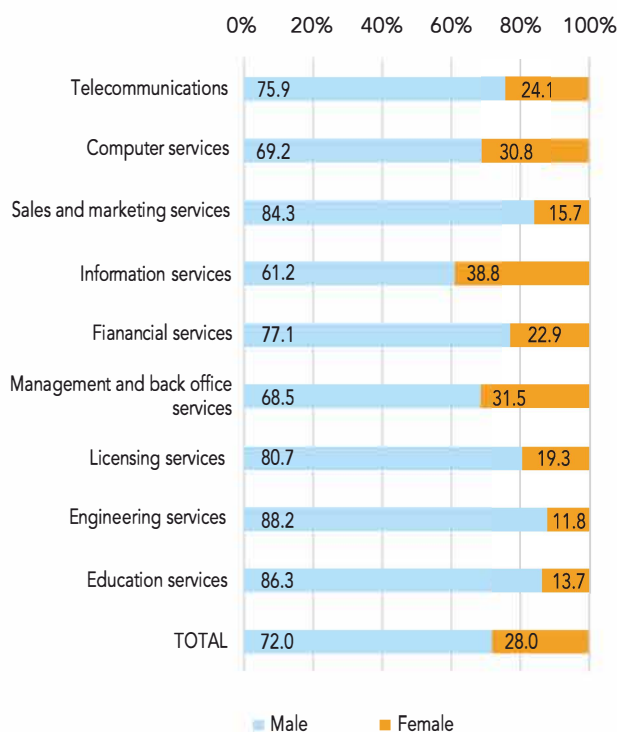


Figure 4.22: EMPLOYMENT SIZE WISE

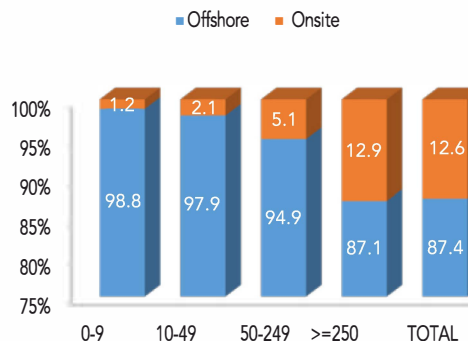
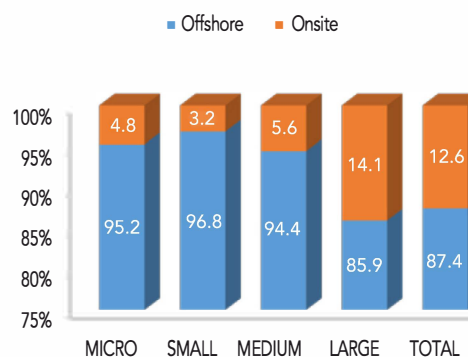


Figure 4.23: ENTERPRISE TURNOVER WISE



The 2017-18 survey data further revealed that large enterprises employing more than 250 persons had 87% offshore and 13% onsite employment while enterprises with employment in the range of 50 to 249 persons had a share of 95% in offshore and 5% in onsite employment. The share of onsite employment in enterprises employing up to 9 and 10 to 49 persons was 1% and 2% respectively. (See Figure 4.22 and Annexure Table A15)

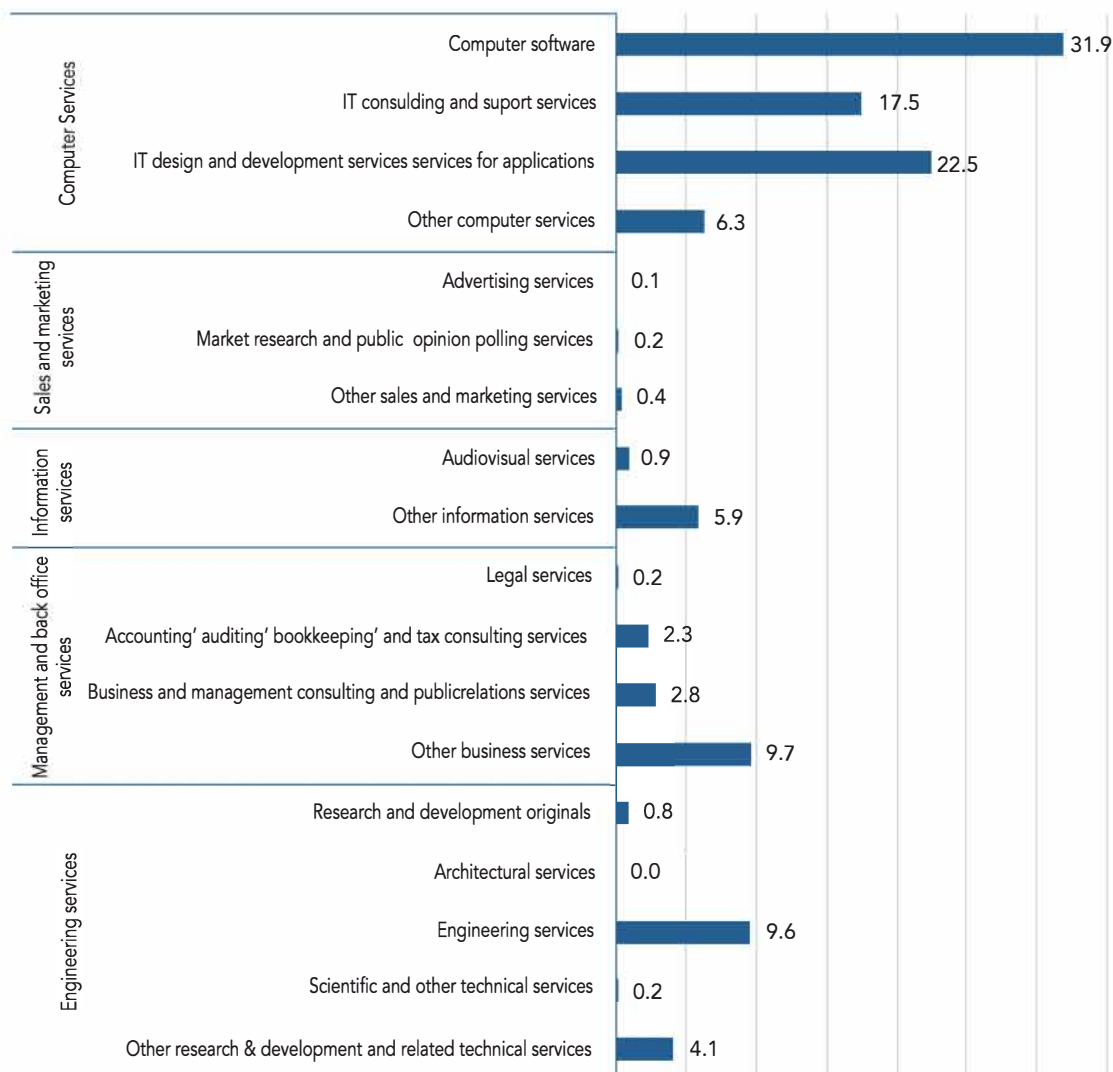
Going by the turnover criteria for categorization of enterprises into Micro, Small, Medium and Large as adopted for the 2016-17 survey, large enterprises had 86% offshore and 14% onsite employment, medium enterprises 94% offshore and 6% onsite employment, small enterprises 97% offshore and 3% onsite employment and micro enterprises 95% offshore and 5% onsite employment (See Figure 4.23 and Annexure Table A15).

4.6 Sub-category wise Exports of potential ICT-enabled services:

As would be seen from Table A16, collection of information on export of only a few sub-categories for a couple of major service categories like Computer services, Information services, Management and back office services, Engineering services and Sales and marketing services had been attempted in the 2017-18 survey. Incidentally, these service categories together constitute more than 95% of India's potential ICT-enabled services export.

In Computer Services, sub-categories Computer Software, IT design and development services and IT consulting and support services, with exports valued at around USD 32, 22 and 18 billion respectively, contributed to almost 90% of computer services export. Other computer services had exports of USD 6 billion.

Figure 4.24: Sub-category wise Exports (in Billion USD) of Potential ICT-enabled Services during 2017-18



In the Sales and Marketing services category, sub-categories advertising and market research and public opinion polling services contributed to USD 215 million only. Other sales and marketing services had exports valued at USD 426 million.

In the Information services category, the sub-category Audio-visual services that included Audio-visual and related services; On-line audio content; On-line video content; Radio and television broadcast originals; Home programme distribution services, basic programming package; Home programme distribution services, discretionary programming package; Home programme distribution services, pay per view and

Radio and television channel programmes contributed to only USD 0.9 billion. The remaining exports of almost USD 6 billion had been included under the sub-category 'Other Information services'.

In the Management and back office services category the sub-category accounting, auditing, bookkeeping, Tax consultancy and insolvency and receivership services had exports valued at USD 2.3 billion and the sub-category Business and Management consulting and public relations services USD 2.8 billion. Export of legal services was nominal at USD 0.2 billion. However, it is the sub-category 'other business services' that has contributed close to USD 10 billion in the

export of Management and back office services.

In the Engineering, related technical services and R&D category, the sub-category Engineering services at USD 9.6 billion accounted for 65% of USD 14.7 billion exports. Export of Research and development originals had contributed to export of USD 842 million, Scientific and other technical services to USD 192 million and Architectural services to USD 9 million. However, other research and development and related technical services contributed to more than USD 4.1 billion. (See Figure 4.24 and Annexure Table A16)

There is no comparative data available for 2016-17.

4.7 Export intensity (EI) of potential ICT-enabled services:

Export intensity, defined as the ratio of aggregated export of services to total firm services sales, is a widely utilized measure of export performance. Higher levels of export intensity indicate an increasing level of

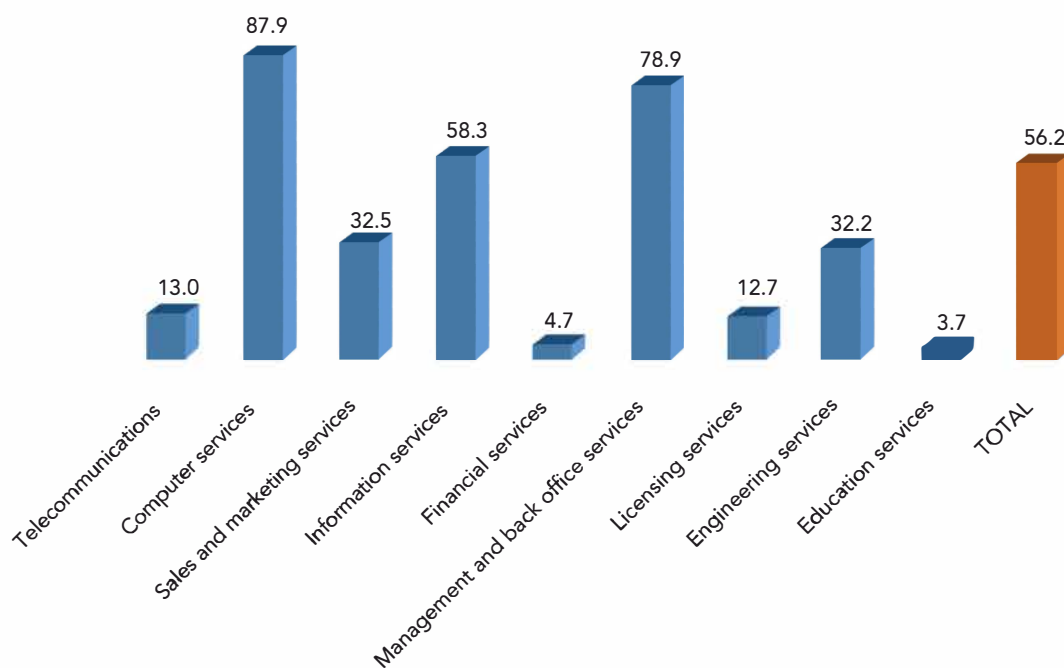
reliance on exporting.

The overall export intensity for the potential ICT-enabled services in 2017-18 was 56% indicating a high level of dependence on exports. In 2016-17 the overall export intensity for potential ICT-enabled services was 34%.

Among the 9 categories of potential ICT-enabled services, Computer services, Management and back office services and Information services with export intensities of 88%, 79% and 58% in 2017-18. They were also the top 3 export intensified services as recorded in 2016-17 implying their continuing high dependence on exports.

Sales and marketing services with EI 32.5%, Engineering and R&D services with EI of 32%, Telecommunications and Licensing services both with EI 13% were also moderately dependent on exports during 2017-18 (See Figure 4.25 and Annexure Table A17).

Figure 4.25: EXPORT INTENSITY BY CATEGORY OF SERVICES DURING 2017-18



4.8 State-wise distribution of Exports of Potential ICT-enabled Services:

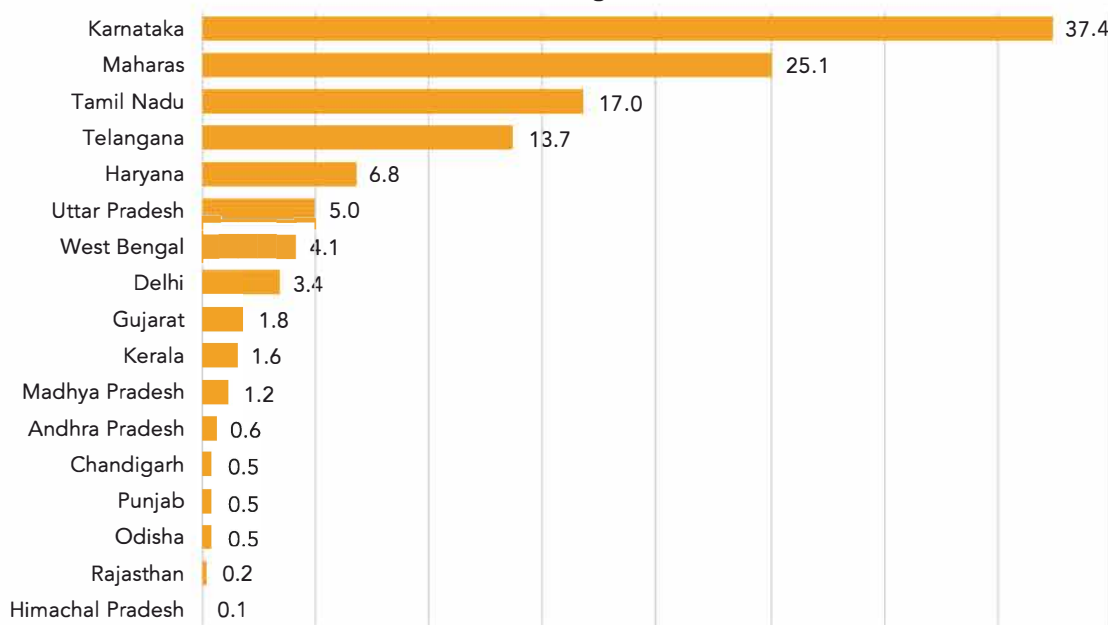
Karnataka, with exports valued at USD 37.4 billion had almost 31% share in India's export of potential ICT-enabled services. Other states with significant share in export of potential ICT-enabled services were Maharashtra with exports at USD 25 billion and 21% share, Tamil Nadu with exports at USD 17 billion and 14% share and Telangana with exports at USD 13.7 billion and 11% share. Haryana, Uttar Pradesh and West Bengal had 6%, 4% and 3.5% share in export of potential ICT-enabled services (See Figure 4.26 and Annexure Table A18).

state's export are management and back office services with a share of 15%, engineering and R&D services with share of 10% and information services with a share of 8%.

Computer services with share of 72% and engineering and management services, both with share of 11% each dominated potential ICT-enabled services export from Tamil Nadu while computer services with 66% share and management and information services each with 12% share accounted for bulk of services exports from Telangana.

Computer, management and engineering services

Figure 4.26: State-wise distribution of Exports (in Billion USD) of Potential ICT-enabled Services during 2017-18



70% of Karnataka's export of potential ICT-enabled services had come from computer services, 13% from engineering services and 11% from management and back office services. Other services accounted for 6% of services exports.

In the case of Maharashtra, computer services had a share of 62% in the state's export of potential ICT-enabled services. Other services contributing to the

accounted for 84% of potential ICT-enabled services export from Haryana while information services contributed to another 7%. Computer and engineering services had 80% share in UP's potential ICT-enabled services export while computer and management services contributed to 88% of West Bengal's export. These 7 states accounted for 91% of India's potential ICT-enabled services export during 2017-18. (see Annexure Table A19).

4.9 Export of ICT-enabled Services by Mode of Supply:

As already mentioned in Para 1.1, supply of services can take place through Mode 1 (cross-border supply), Mode 2 (consumption abroad), Mode 3 (commercial presence) and Mode 4 (presence of natural persons).

through Mode 3 was accounted for by computer services, engineering services had a share of almost 9% and information services, a share of 9%.

Share of Mode 3 in export of computer services was around 19%, engineering services 12% and information services above 21%.

Table 4.6: Export of ICT-enabled Services by Modes of Supply during 2017-18

Sl. No.	Category of Service	Value of Services (in USD million) delivered through				
		Mode 1	Mode 2	Mode 3	Mode 4	Total
1.	Telecommunication	2,974.5	0.9	220.8	140.2	3,336.5
2.	Computer Services (including computer software)	60,698.8	14.5	18,218.3	17,433.0	96,364.7
3.	Sales and marketing services	573.2	66.0	5.7	1.9	646.8
4.	Information services	5,399.7	6.7	1,862.8	1,456.3	8,725.6
5.	Financial services	670.0	35.4	27.6	4.7	737.7
6.	Management, administration and back office services	14,679.8	6.2	700.0	290.8	15,676.9
7.	Licensing services	248.0	0.0	19.2	0.0	267.2
8.	Engineering, related technical services and R&D	11,435.5	9.0	1,994.0	3,259.8	16,698.3
9.	Education services	47.2	1.5	8.6	0.0	57.2
	Total	96,726.8	140.3	23,057.0	22,586.7	1,42,510.9

The 2016-17 survey on export of ICT-enabled services was restricted to capturing data of services delivered through Mode 1, Mode 2 and Mode 4. Since supply of services through establishment of commercial presence abroad is gaining importance on account of restrictions being imposed by several countries on movement of natural persons, the 2017-18 survey attempted to collect information on all the four modes of supply for the major service categories. The value of services delivered through all 4 modes in USD is provided in Table 4.6.

ICT-enabled services delivered through all the four modes in 2017-18 were valued at USD 142.5 billion; ICT-enabled services delivered through Mode 3 for all the nine categories were valued at USD 23 billion. About 79% of the total ICT-enabled services delivered

4.10 Delivery of ICT-enabled Services by Modes 1, 2 & 4 - 2017-18 vis-à-vis 2016-17:

In 2016-17 off-site delivery of services (Mode 1 + Mode 2) accounted for around 80% of India's ICT-enabled services export. On-site delivery accounted for the remaining 20%. In 2017-18, off-site delivery of ICT-enabled services increased marginally to a little more than 81%. However, computer services which alone accounted for almost two-third of ICT-enabled services export, its share of off-site delivery increased significantly from 73% in 2016-17 to more than 78% in 2017-18 reducing the share of on-site delivery from 27% in 2016-17 to 22% in 2017-18. The share of Mode 4 in Engineering and R&D services increased from 17% in 2016-17 to 22% in 2017-18 (See Table 4.7).

Table 4.7: Mode wise delivery of ICT –enabled services – 2017-18 vis-à-vis 2016-17

Sl. No.	Category of Service	Value of services (million USD) -2016-17				Value of services (million USD)-2017-18			
		Mode 1	Mode 2	Mode 4	Total	Mode 1	Mode 2	Mode 4	Total
1.	Telecommunication	2,762.7	-	20.2	2,782.9	2,974.5	0.9	140.2	3,115.6
2.	Computer Services (including computer software)	47,704.3	5.8	17,407.1	65,117.1	60,698.8	14.5	17,433.0	78,146.4
3.	Sales and marketing services	665.7	4.1	-	669.7	573.2	66.0	1.9	641.1
4.	Information services	6,519.9	1.0	43.0	6,563.8	5,399.7	6.7	1,456.3	6,862.8
5.	Financial services	1,699.3	7.1	55.7	1,762.1	670.0	35.4	4.7	710.1
6.	Management, administration and back office services	13,502.8	1.7	436.1	13,940.5	14,679.8	6.2	290.8	14,976.8
7.	Licensing services	343.7	-	-	343.7	248.0	0.0	0.0	248.0
8.	Engineering, related technical services and R&D	9,644.4	97.1	1,995.1	11,736.6	11,435.5	9.0	3,259.8	14,704.1
9.	Education services	74.2	65.8	6.0	146.1	47.2	1.5	0.0	48.7
	Total	82,916.9	182.5	19,963.1	103,062.5	96,726.8	140.3	22,586.7	119,453.6

4.11 ICT-enabled Services rendered from Subsidiaries/Associates abroad:

The survey collected information on businesses of foreign subsidiaries/associates of Indian companies rendered locally, to India and to other countries for

services with exports valued at USD 5148.2 million had a share of almost 75% in the exports of Indian-owned foreign affiliates. Engineering services at USD 880 million had a share of 13% and information services with exports at USD 345 million had a share of 5% (See Table 4.8).

Table 4.8: ICT businesses by Foreign Affiliates of Indian Companies during 2017-18

Sl. No.	Category of Service	Businesses by foreign affiliates of Indian Companies					
		Locally		To India		Other countries	
		INR billion	USD million	INR billion	USD million	INR billion	USD million
1.	Telecommunication	14.7	220.8	6.5	98.3	44.3	665.3
2.	Computer Services	1,213.1	18,218.3	27.2	408.4	342.8	5,148.2
3.	Sales & Marketing services	0.4	5.7	1.7	25.9	5.1	77.1
4.	Information services	124.0	1,862.8	79.3	1,191.0	23.0	345.2
5.	Financial services	1.8	27.6	-	-	0.6	9.7
6.	Management and back office services	46.6	700.0	1.9	29.2	9.5	143.1
7.	Licensing services	1.3	19.2	0.0	0.7	0.7	10.8
8.	Engineering services	132.8	1,994.0	3.4	50.7	58.6	880.2
9.	Education services	0.6	8.6	0.0	0.1	-	-
	Total	1,535.3	23,057.1	120.1	1,804.3	484.7	7,279.6

all the nine categories other countries for all the nine categories of services for the purpose of Foreign Affiliates Trade in Services (FATS). Details are shown in Table 4.8.

The total business in ICT-enabled services of Indian-owned foreign affiliates including services to India was close to USD 32 billion. Excluding the value of services to India, business in ICT-enabled services of Indian-owned foreign affiliates was valued at almost USD 31 billion. More than 71% of the ICT business of overseas subsidiaries was accounted for by services delivered in the host countries and 23% by exports to other countries.

Close to 80% of the local business of overseas subsidiaries was in computer services; engineering services had a share of almost 9% and information services a share of 8%. However, information services accounted for 70% and computer services 24% of the businesses of overseas subsidiaries to India. Computer

The ICT businesses by foreign affiliates of Indian companies in top 10 countries have been provided in Table 4.9.

As will be seen, USA had almost two-thirds share of ICT businesses by foreign affiliates followed by UK with a share of 6%. Three of the Middle East countries appearing in the list of top 10 countries – UAE, Oman and Saudi Arabia had a share in excess of 10% of businesses by foreign affiliates of Indian companies. Netherland, Singapore, Germany, Canada and Australia with a combined share of more than 10% are the other countries appearing in the list of top 10 countries by businesses of foreign affiliates of Indian companies (See Table 4.9, Figure 4.27 and Annexure Table A20).

As information on foreign subsidiaries/ affiliates had been collected for the first time in 2017-18, comparative data is not available for financial year 2016-17.

Figure 4.27: Percentage share in total ICT business by foreign affiliates

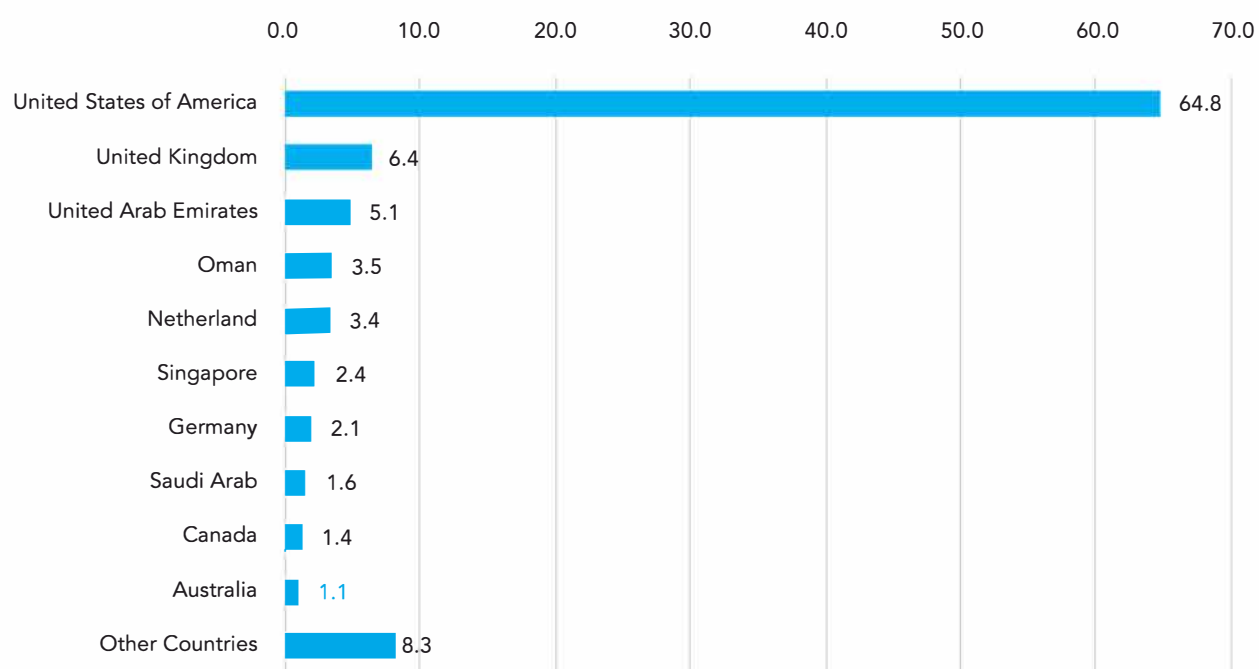


Table 4.9: ICT businesses by Foreign Affiliates of Indian Companies during 2017-18

Sl. No.	Country	Share in total ICT business by foreign affiliates	ICT business by foreign affiliates (USD million)		
			Locally	To India	Other countries
1.	United States of America	64.8	16,790.8	1,218.4	2,819.0
2.	United Kingdom	6.4	1,330.3	151.5	575.9
3.	United Arab Emirates	5.1	780.9	86.3	757.3
4.	Oman	3.5	1,103.9	0.0	36.9
5.	Netherland	3.4	189.6	0.0	914.1
6.	Singapore	2.4	366.4	97.1	297.0
7.	Germany	2.1	264.0	100.3	300.1
8.	Saudi Arab	1.6	320.6	0.0	186.3
9.	Canada	1.4	301.4	0.8	134.6
10.	Australia	1.1	290.1	19.7	47.7
11.	Other Countries	8.3	1,319.0	130.1	1,210.4
	Total	100.0	23,057.0	1,804.3	7,279.6

5



OBSERVATIONS, LIMITATIONS AND RECOMMENDATIONS



5.1 Observations and limitations:

As in 2016-17, enterprises were encouraged for self-compilation of the returns. Clarifications as well as assistance for compilation of information were mostly provided through e-mail and telephone. Field visits were made only for persuasion of the units if the same could not be achieved over emails or telephone calls. This approach to data collection had resulted in significant savings in cost and time in conducting the fieldwork of the survey. Adoption of enterprise-based approach for collection of information from the corporate head-quarters, covering all the establishments located across the country, made fieldwork for data collection easy and convenient.

With no major changes in the questionnaire used in the 2016-17 survey except for inclusion of a couple of new items/ blocks, the respondents did not face any significant difficulty in submitting the desired information in the prescribed questionnaire. Close to 90% of the units preferred electronic mode for submission of data.

In the absence of any inputs from GSTN towards preparing an exhaustive sampling frame of enterprises for selection of samples, it had not been possible to

ensure completeness of coverage for all categories of services. The estimates are therefore subject to the conventional sampling as well as non-sampling errors attributable to any survey sampling exercise.

Business register which could have provided ancillary information on the exporting units is not yet available in India. Non-receipt of inputs from GSTN prevented DGCIS from preparing sectoral business directories of exporting units and experimenting with any sophisticated sampling procedure to increase the precision of the estimates

As already mentioned, data on financial and education services have some limitations in terms of coverage as the survey has collected information from IT units providing financial and education services rather than entities exclusively providing these services. The figures for financial and education and training services are therefore gross underestimates and need to be used with caution.

5.2 Comparison of survey estimates with BoP figures & RBI Survey on Computer Services for FY 2017-18:

The following Table provides the comparative position between the survey estimates and the BoP figures of 2017-18 published by RBI.

Category of Service	Value of exports (in million USD)	BoP Item	Value of receipts (in million USD)*
Telecommunications	3,116	Telecommunications	2,098
Computer services (including computer software)	78,146	Software services	77,326
Sales and marketing services (not including trade and leasing services)	641	Corresponding category is not available in BOP data; comparable figures have been derived by identifying appropriate constituent of BoP items.	2,260
Information services	6,863		1,428
Financial Services	710		5,164
Management, administration and back office services	14,977		13,392
Licensing services	248		616
Engineering, related technical services and R&D	14,704		7,165
Education and Training Services	49		428
Total of above	119,454		

*Source : Invisibles Receipts by Category of Transactions, 2018, RBI

As would be seen from Table 5.1, the export figures of telecommunication and computer services estimated through the survey broadly match with the BoP figures compiled by RBI using the Foreign Exchange Transaction Electronic Reporting System.

Some mismatch is expected at the aggregate level because of methodological differences. Whereas the survey estimates are based on revenue earnings of the enterprise on accrual basis i.e. figures as reported in the invoice, the BoP figures are compiled by RBI on realization basis, i.e., after the payment against invoices are realized. Differences in the composition of services categories in BoP and potential ICT-enabled services also contributed to this variability.

RBI since 2002 has been conducting a comprehensive survey on India's 'Computer Software and Information Technology Services Exports', annually to generate detailed information on India's exports of IT and IT-enabled services.

As per results of the 2017-18 survey on India's 'Computer Software and Information Technology Services Exports', released by RBI in December 2018, exports in computer services was valued at 74.0 billion USD and engineering services 7.7 billion USD. The corresponding figures estimated through the survey on export of ICT-enabled services are marginally higher at 78 billion USD and 9.5 billion USD respectively.

5.3 Recommendations

5.3.1 Based on the recommendations of the 2016-17 survey on export of ICT-enabled services, several new items/ blocks had been introduced in the 2017-18 survey for data collection on ICT-enabled services. However, for ensuring complete coverage of units exporting ICT-enabled services it is essential that frame used for selection of units in different service categories is complete and up-to-date.

The Goods & Services Tax, implemented from 1st July, 2017 which has provisions for registering all enterprises engaged in export and import of both goods and services is ideally suited to meet this requirement. Using a sampling frame based on GST registration data has several advantages:

(a) Although DGCIS has used multiple sources to collect information of units engaged in export of ICT-enabled

services in different sectors, completeness in the coverage of ICT units still remains an issue. Using the GSTN registration data for frame preparation at the sectoral level is likely to bring additional units under the coverage of the survey and improve confidence in the quality of estimates.

(b) Enable DGCIS prepare sectoral frames of ICT-enabled services importing units to collect information on country and mode wise import of ICT-enabled services through a pan-India survey.

5.3.2 A new block to capture information on exports by sub-categories of services had been introduced in the 2017-18 survey. The contribution of sub-category 'others' was found to be very high for several services categories like computer services, information services, management and back office services and engineering services. There is therefore a need to introduce additional sub-categories to understand the exact nature of services that are being exported under these service categories.

5.3.3 In the economic package to MSME sector recently announced by the Government of India, a composite criterion based on investment and annual turnover has been adopted for classifying micro, small and medium enterprises. As per the new criteria the proposed investment and turnover thresholds are: Micro – Investment up to INR 10 million and turnover up to INR 50 million; Small – Investment up to INR 100 million and turnover up to INR 500 million and Medium – Investment up to INR 500 million and turnover up to INR 2500 million. Large enterprises will have turnover exceeding INR 2500 million.

The existing schedule does not have provision for capturing information on investment of the enterprise. In the next round of survey a question on investment of the enterprise may be considered for inclusion in the general information block so that the dual criteria of investment and turnover can be adopted for classifying enterprises into micro, small and medium enterprises.

5.3.4 To meet the demand for timely and reliable disaggregated data on trade in ICT-enabled services from policy makers, trade negotiators and researchers, both national and international, the survey on export of ICT enabled services should be made an integral part of the annual survey plan on services of DGCIS.

ANNEXURE I

*A*PPENDIX TABLES



Country/ Region	Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	Total
Africa	13.80	57.00	0.08	6.64	2.56	8.75	1.58	23.59	0.08	114.08
Mauritius	11.15	4.30	0.07	4.15	2.54	5.41	1.43	1.94	0.00	31.00
Other African Countries	1.86	12.87	0.01	1.83		1.83	0.11	19.03	0.06	37.61
South Africa	0.79	39.83		0.66	0.02	1.50	0.05	2.62	0.01	45.48
Americas	58.73	3,064.02	9.58	265.97	25.28	538.49	6.94	438.41	1.77	4,409.20
Canada	5.46	54.88	0.12	13.58	0.61	9.28	0.04	5.95	0.01	89.93
Latin America*	2.72	12.77	0.00	1.53	0.12	1.43	0.00	2.54		21.11
United States	50.54	2,996.36	9.46	250.87	24.56	527.78	6.89	429.93	1.76	4,298.15
Asia	49.21	433.05	14.55	37.82	2.67	75.11	2.63	236.74	1.17	852.95
Hong Kong	8.25	16.75	1.95	1.31	0.50	7.18	0.36	0.40	0.00	36.70
Japan	1.13	33.65	0.11	4.04	0.16	6.84	0.08	20.52		66.53
Other East Asian Countries*	2.82	49.11	0.26	2.76	0.53	8.88	0.44	33.60	0.38	98.77
Other West Asian Countries*	3.28	36.13	0.17	2.43	0.53	7.07	0.04	29.22	0.18	79.04
Singapore	22.71	216.68	11.48	18.96	0.65	37.69	0.31	12.89	0.07	321.44
South Asia*	2.87	38.95	0.02	0.95	0.10	1.24	0.30	94.43	0.09	138.94
UAE	8.15	41.79	0.57	7.38	0.18	6.23	1.10	45.67	0.45	111.51
Australia	1.10	162.34	0.32	16.32	0.70	17.89	0.08	7.06	0.00	205.80
Australia	1.07	157.28	0.30	15.11	0.50	17.61	0.07	6.88	0.00	198.81
New Zealand	0.03	5.06	0.02	1.21	0.20	0.27	0.01	0.19		6.99
Europe	70.02	1,173.19	17.92	107.13	14.94	347.48	5.01	258.63	0.18	1,994.50

Table A1: Exports of potential ICT-enabled services by category of service and country/region (in INR Billion)

Country/ Region	Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	Total
France	3.65	59.05	0.10	3.80	1.78	10.41	0.02	33.83		112.65
Germany	1.52	123.61	0.51	12.85	0.33	11.61	0.03	67.53		217.99
Ireland	2.16	60.16	3.25	3.74	0.51	42.82	1.04	16.15	0.00	129.82
Luxembourg	2.45	5.15	0.00	1.85	0.40	0.96	0.07	0.02		10.90
Netherlands	1.67	136.38	1.04	5.43	0.18	11.30	0.01	23.61		179.63
Other EU Countries	5.52	86.61	0.53	10.50	2.25	30.66	0.01	44.71		180.79
Other European Countries*	0.83	67.72	0.21	2.90	0.68	3.80	0.16	8.85	0.02	85.18
Spain	0.76	6.52	0.00	0.58	0.01	0.95	0.00	2.53		11.35
Sweden	26.79	41.42	0.00	4.71	0.00	1.83	0.04	5.55		80.36
Switzerland	0.87	56.09	6.37	17.19	0.10	17.71	0.01	19.94	0.00	118.28
United Kingdom	23.80	530.49	5.90	43.59	8.69	215.41	3.61	35.90	0.16	867.56
Other Countries	14.61	314.01	0.24	23.09	1.13	9.55	0.27	14.68	0.03	377.62
Other Country	14.61	314.01	0.24	23.09	1.13	9.55	0.27	14.68	0.03	377.62
TOTAL	207.46	5,203.60	42.69	456.98	47.29	997.27	16.51	979.11	3.24	7,954.15

Country/ Region	Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	Total
Africa	207.28	856.01	1.19	99.71	38.48	131.39	23.77	354.28	1.13	1,713.23
Mauritius	167.49	64.54	1.08	62.32	38.21	81.32	21.41	29.07	0.06	465.50
Other African Countries	27.97	193.29	0.12	27.49		27.48	1.64	285.83	0.92	564.75
South Africa	11.82	598.18		9.89	0.26	22.60	0.71	39.38	0.15	682.99
Americas	881.95	46,014.66	143.89	3,994.30	379.71	8,086.92	104.19	6,584.01	26.65	66,216.28
Canada	82.04	824.22	1.78	203.91	9.20	139.36	0.65	89.29	0.17	1,350.62
Latin America*	40.89	191.76	0.03	22.94	1.74	21.52	0.04	38.13		317.04
United States	759.03	44,998.68	142.08	3,767.45	368.77	7,926.04	103.51	6,456.59	26.48	64,548.62
Asia	738.97	6,503.44	218.53	568.02	40.04	1,128.05	39.55	3,555.25	17.61	12,809.48
Hong Kong	123.88	251.58	29.27	19.61	7.52	107.81	5.45	6.03	0.07	551.21
Japan	17.03	505.29	1.71	60.61	2.45	102.72	1.24	308.15		999.20
Other East Asian Countries*	42.31	737.51	3.88	41.38	8.02	133.29	6.62	504.66	5.66	1,483.32
Other West Asian Countries*	49.20	542.53	2.50	36.56	8.02	106.13	0.63	438.82	2.68	1,187.07
Singapore	341.09	3,254.01	172.42	284.76	9.78	566.00	4.61	193.62	1.10	4,827.38
South Asia*	43.14	584.88	0.25	14.24	1.57	18.59	4.51	1,418.11	1.33	2,086.61
UAE	122.33	627.64	8.50	110.88	2.68	93.52	16.49	685.87	6.76	1,674.68
Australia	16.50	2,437.92	4.73	245.08	10.55	268.59	1.20	106.06	0.05	3,090.69
Australia	16.09	2,361.97	4.46	226.88	7.48	264.48	1.07	103.27	0.05	2,985.75
New Zealand	0.41	75.95	0.27	18.20	3.07	4.12	0.13	2.80		104.94

Table A2: Exports of potential ICT-enabled services by category of service and country/region (in USD Million)

Country/ Region	Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	Total
Europe	1,051.56	17,618.65	269.11	1,608.85	224.38	5,218.39	75.20	3,884.03	2.77	29,952.93
France	54.76	886.73	1.57	57.12	26.79	156.36	0.34	508.04		1,691.71
Germany	22.81	1,856.33	7.65	192.91	4.96	174.43	0.40	1,014.20		3,273.68
Ireland	32.42	903.47	48.75	56.11	7.66	643.10	15.56	242.53	0.00	1,949.60
Luxembourg	36.76	77.30	0.02	27.80	6.05	14.39	1.10	0.33		163.76
Netherlands	25.01	2,048.15	15.67	81.50	2.75	169.77	0.20	354.54		2,697.60
Other EU Countries	82.92	1,300.62	7.93	157.72	33.78	460.40	0.21	671.45		2,715.02
Other European Countries*	12.51	1,017.03	3.20	43.49	10.22	57.11	2.42	132.91	0.33	1,279.24
Spain	11.47	97.87	0.01	8.70	0.16	14.27	0.01	37.98		170.48
Sweden	402.39	622.10	0.05	70.71	0.01	27.56	0.62	83.32		1,206.75
Switzerland	13.07	842.28	95.62	258.12	1.51	265.96	0.14	299.53	0.00	1,776.23
United Kingdom	357.43	7,966.77	88.64	654.66	130.48	3,235.04	54.20	539.21	2.43	13,028.86
Other Countries	219.38	4,715.70	3.66	346.82	16.97	143.48	4.07	220.44	0.45	5,670.96
Other Country	219.38	4,715.70	3.66	346.82	16.97	143.48	4.07	220.44	0.45	5,670.96
TOTAL	3,115.64	78,146.38	641.11	6,862.79	710.12	14,976.82	247.97	14,704.07	48.66	1,19,453.57

Country/ Region	Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	Total
Africa	12.99	40.78	0.04	5.89	2.56	8.31	1.58	8.07	0.08	80.30
Mauritius	11.14	4.14	0.04	4.15	2.54	5.40	1.43	0.74	0.00	29.58
Other African Countries	1.19	12.03	0.00	1.30		1.63	0.11	4.95	0.06	21.27
South Africa	0.66	24.61		0.44	0.02	1.28	0.05	2.39	0.01	29.45
Americas	56.03	2,381.01	9.05	214.67	24.95	530.75	6.94	397.53	1.73	3,622.66
Canada	5.45	45.10	0.12	6.06	0.61	9.13	0.04	4.79	0.01	71.31
Latin America*	2.47	7.65	0.00	1.53	0.11	1.37	0.00	2.42		15.55
United States	48.11	2,328.27	8.94	207.08	24.22	520.25	6.89	390.32	1.72	3,535.79
Asia	47.56	358.58	13.62	30.71	2.08	71.97	2.63	97.85	1.14	626.14
Hong Kong	8.25	14.57	1.63	1.30	0.35	7.12	0.36	0.38	0.00	33.96
Japan	1.05	28.00	0.03	2.33	0.14	6.81	0.08	18.04		56.47
Other East Asian Countries*	2.54	45.47	0.24	1.66	0.47	7.28	0.44	26.79	0.38	85.27
Other West Asian Countries*	2.17	25.20	0.15	1.83	0.49	6.23	0.04	17.63	0.18	53.92
Singapore	22.66	186.57	11.00	16.95	0.35	37.51	0.31	12.42	0.04	287.81
South Asia*	2.86	21.59	0.02	0.94	0.09	1.19	0.30	8.35	0.09	35.44
UAE	8.04	37.19	0.54	5.71	0.17	5.82	1.10	14.24	0.45	73.26
Australia	0.98	94.13	0.19	5.24	0.63	16.63	0.08	6.14	0.00	124.02
Australia	0.95	91.03	0.18	4.93	0.43	16.39	0.07	5.99	0.00	119.98
New Zealand	0.03	3.10	0.02	0.31	0.20	0.24	0.01	0.15		4.04

Table A3: Exports of ICT-enabled services (Mode 1) by category of service and country/region (in INR Billion)

Country/ Region	Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	Total
Europe	65.98	922.79	15.02	81.10	13.32	340.86	5.01	237.52	0.16	1,681.76
France	3.61	53.94	0.10	3.00	1.78	10.34	0.02	32.87		105.66
Germany	1.47	103.17	0.17	11.77	0.17	11.26	0.03	58.05		186.07
Ireland	2.15	57.22	3.25	3.20	0.51	42.50	1.04	15.99	0.00	125.85
Luxembourg	2.45	4.35	0.00	0.68	0.40	0.95	0.07	0.02		8.93
Netherlands	1.60	123.74	1.04	2.89	0.15	11.23	0.01	22.95		163.60
Other EU Countries	5.37	64.32	0.51	6.24	2.25	30.27	0.01	42.85		151.83
Other European Countries*	0.77	42.39	0.14	2.38	0.67	3.43	0.16	7.89	0.02	57.85
Spain	0.76	5.43	0.00	0.39	0.01	0.91	0.00	2.47		9.97
Sweden	23.92	32.14	0.00	1.16	0.00	1.77	0.04	4.17		63.20
Switzerland	0.86	41.24	6.37	13.84	0.10	17.35	0.01	19.77	0.00	99.54
United Kingdom	23.03	394.85	3.44	35.57	7.27	210.85	3.61	30.50	0.14	709.26
Other Countries	14.52	246.20	0.24	22.41	1.08	9.54	0.27	14.22	0.03	308.52
Other Country	14.52	246.20	0.24	22.41	1.08	9.54	0.27	14.22	0.03	308.52
TOTAL	198.07	4,043.49	38.17	360.02	44.61	978.05	16.51	761.33	3.14	6,443.40

Table A4: Exports of ICT-enabled services (Mode 1) by category of service and country/region (in USD Million)										
Country/ Region	Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	Total
Africa	195.15	612.45	0.64	88.40	38.48	124.75	23.77	121.19	1.13	1,205.95
Mauritius	167.26	62.18	0.59	62.32	38.21	81.14	21.41	11.05	0.06	444.23
Other African Countries	17.90	180.63	0.05	19.54		24.46	1.64	74.26	0.92	319.42
South Africa	9.99	369.63		6.54	0.26	19.15	0.71	35.88	0.15	442.31
Americas	841.49	35,757.52	135.97	3,223.85	374.66	7,970.65	104.19	5,969.95	25.94	54,404.21
Canada	81.82	677.29	1.78	91.05	9.16	137.12	0.65	71.91	0.17	1,070.95
Latin America*	37.17	114.87	0.00	22.93	1.70	20.53	0.04	36.32		233.55
United States	722.51	34,965.36	134.19	3,109.88	363.79	7,813.00	103.51	5,861.72	25.76	53,099.72
Asia	714.19	5,385.14	204.50	461.20	31.18	1,080.78	39.55	1,469.54	17.16	9,403.25
Hong Kong	123.87	218.77	24.50	19.50	5.32	106.93	5.45	5.64	0.07	510.06
Japan	15.70	420.54	0.41	34.94	2.07	102.31	1.24	270.87		848.08
Other East Asian Countries*	38.08	682.83	3.65	24.89	7.13	109.37	6.62	402.35	5.66	1,280.58
Other West Asian Countries*	32.52	378.49	2.31	27.43	7.38	93.58	0.63	264.80	2.67	809.81
Singapore	340.28	2,801.79	165.21	254.50	5.31	563.32	4.61	186.54	0.67	4,322.23
South Asia*	43.00	324.28	0.25	14.15	1.37	17.92	4.51	125.43	1.33	532.22
UAE	120.73	558.45	8.18	85.80	2.60	87.34	16.49	213.92	6.76	1,100.27
Australia	14.74	1,413.55	2.92	78.68	9.47	249.79	1.20	92.15	0.05	1,862.56
Australia	14.33	1,367.06	2.66	74.08	6.40	246.19	1.07	89.96	0.05	1,801.82
New Zealand	0.41	46.49	0.27	4.59	3.07	3.59	0.13	2.19		60.74

Table A4: Exports of ICT-enabled services (Mode 1) by category of service and country/region (in USD Million)

Country/ Region	Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	Total
Europe	990.92	13,858.22	225.55	1,218.00	199.96	5,118.93	75.18	3,567.00	2.45	25,256.23
France	54.20	810.08	1.57	45.01	26.79	155.22	0.34	493.63		1,586.85
Germany	22.13	1,549.35	2.48	176.70	2.48	169.13	0.40	871.71		2,794.37
Ireland	32.23	859.37	48.75	48.10	7.66	638.28	15.56	240.07	0.00	1,890.03
Luxembourg	36.75	65.29	0.02	10.17	6.05	14.33	1.10	0.32		134.04
Netherlands	24.00	1,858.22	15.64	43.33	2.27	168.65	0.20	344.62		2,456.94
Other EU Countries	80.69	965.96	7.64	93.70	33.78	454.56	0.21	643.54		2,280.08
Other European Countries*	11.55	636.62	2.10	35.67	10.08	51.45	2.41	118.52	0.33	868.73
Spain	11.37	81.56	0.01	5.91	0.16	13.63	0.01	37.06		149.72
Sweden	359.21	482.67	0.02	17.48	0.01	26.57	0.62	62.58		949.16
Switzerland	12.98	619.36	95.61	207.78	1.50	260.63	0.13	296.87	0.00	1,494.87
United Kingdom	345.80	5,929.73	51.71	534.15	109.18	3,166.49	54.20	458.08	2.12	10,651.44
Other Countries	218.11	3,697.38	3.65	336.56	16.24	143.27	4.07	213.60	0.45	4,633.33
Other Country	218.11	3,697.38	3.65	336.56	16.24	143.27	4.07	213.60	0.45	4,633.33
TOTAL	2,974.60	60,724.26	573.24	5,406.69	670.00	14,688.17	247.96	11,433.44	47.18	96,765.53

Table A5: Exports of ICT-enabled services by principal activity during 2017-18

Sl. No.	ISIC Code (2-Digit)	Principal Activity	Value of Exports		% Share of Export
			INR Billion	USD Million	
1	62	Computer programming, consultancy and related activities	4,523.7	67.9	56.9
2	63	Information service activities	1,643.9	24.7	20.7
3	82	Office administrative, office support and other business support activities	280.4	4.2	3.5
4	71	Architectural and engineering activities; technical testing and analysis	234.1	3.5	2.9
5	61	Telecommunications	180.8	2.7	2.3
6	41	Construction of buildings	131.5	2.0	1.7
7	70	Activities of head offices; management consultancy activities	123.4	1.9	1.6
8	74	Other professional, scientific and technical activities	109.3	1.6	1.4
9	26	Manufacture of computer, electronic and optical products	99.2	1.5	1.2
10	66	Activities auxiliary to financial service and insurance activities	94.1	1.4	1.2
11	64	Financial service activities, except insurance and pension funding	92.8	1.4	1.2
12	72	Scientific research and development	69.8	1.0	0.9
13	73	Advertising and market research	35.2	0.5	0.4
14	18	Printing and reproduction of recorded media	34.2	0.5	0.4
15	28	Manufacture of machinery and equipment n.e.c.	34.2	0.5	0.4
16	69	Legal and accounting activities	32.2	0.5	0.4
17	27	Manufacture of electrical equipment	32.0	0.5	0.4
18	32	Other manufacturing	31.1	0.5	0.4
19	42	Civil engineering	25.2	0.4	0.3
20	59	Motion picture, video and television programme production, sound recording and music publishing activities	22.9	0.3	0.3
21	60	Programming and broadcasting activities	20.9	0.3	0.3
22	43	Specialized construction activities	19.6	0.3	0.2
23	99	Activities of extraterritorial organizations and bodies	13.1	0.2	0.2
24	78	Employment activities	8.4	0.1	0.1
25	10	Manufacture of food products	6.7	0.1	0.1
26	46	Wholesale trade, except of motor vehicles and motorcycles	6.4	0.1	0.1
27	80	Security and investigation activities	6.1	0.1	0.1
28	30	Manufacture of other transport equipment	6.1	0.1	0.1

Table A5: Exports of ICT-enabled services by principal activity during 2017-18

Sl. No.	ISIC Code (2-Digit)	Principal Activity	Value of Exports		% Share of Export
			INR Billion	USD Million	
29	58	Publishing activities	5.5	0.1	0.1
30	93	Sports activities and amusement and recreation activities	4.5	0.1	0.1
31	96	Other personal service activities	3.3	0.0	0.0
32	81	Services to buildings and landscape activities	3.1	0.0	0.0
33	47	Retail trade, except of motor vehicles and motorcycles	3.0	0.0	0.0
34	85	Education	2.5	0.0	0.0
35	90	Creative, arts and entertainment activities	2.0	0.0	0.0
36	55	Accommodation	1.6	0.0	0.0
37	88	Social work activities without accommodation	1.3	0.0	0.0
38	84	Public administration and defence; compulsory social security	1.3	0.0	0.0
39	97	Activities of households as employers of domestic personnel	1.1	0.0	0.0
40	77	Rental and leasing activities	1.1	0.0	0.0
41	20	Manufacture of chemicals and chemical products	1.0	0.0	0.0
42	33	Repair and installation of machinery and equipment	1.0	0.0	0.0
43	09	Mining support service activities	1.0	0.0	0.0
44	29	Manufacture of motor vehicles, trailers and semi-trailers	0.8	0.0	0.0
45	79	Travel agency, tour operator, reservation service and related activities	0.6	0.0	0.0
46	65	Insurance, reinsurance and pension funding, except compulsory social security	0.5	0.0	0.0
47	31	Manufacture of furniture	0.4	0.0	0.0
48	06	Extraction of crude petroleum and natural gas	0.3	0.0	0.0
49	07	Mining of metal ores	0.2	0.0	0.0
50	22	Manufacture of rubber and plastics products	0.2	0.0	0.0
51	35	Electricity, gas, steam and air conditioning supply	0.2	0.0	0.0
52	05	Mining of coal and lignite	0.2	0.0	0.0
53	25	Manufacture of fabricated metal products, except machinery and equipment	0.1	0.0	0.0
54	11	Manufacture of beverages	0.1	0.0	0.0
55	51	Air transport	0.1	0.0	0.0
56	86	Human health activities	0.0	0.0	0.0
57	45	Wholesale and retail trade and repair of motor vehicles and motorcycles	0.0	0.0	0.0
58	52	Warehousing and support activities for transportation	0.0	0.0	0.0
59	01	Crop and animal production, hunting and related service activities	0.0	0.0	0.0
60	87	Residential care activities	0.0	0.0	0.0
61		TOTAL	7,954.2	119.5	100.0

Table A6: Exports of ICT-enabled services by Principal activity

Sl. No.	ISIC Code (2-Digit)	Principal Activity	Value of Exports (in INR Billion)												
			Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	All			
1	5	Mining of coal and lignite										0.16			0.16
2	6	Extraction of crude petroleum and natural gas										0.27	0.01		0.27
3	7	Mining of metal ores		0.25											0.25
4	9	Mining support service activities										0.97			0.97
5	10	Manufacture of food products		1.09						3.88		1.77			6.74
6	11	Manufacture of beverages									0.11				0.11
7	18	Printing and reproduction of recorded media		11.75			0.29			8.55		13.62			34.22
8	20	Manufacture of chemicals and chemical products		0.33		0.62	0.06					0.03			1.04
9	22	Manufacture of rubber and plastics products										0.19			0.19
10	24	Manufacture of basic metals										0.00			0.00
11	25	Manufacture of fabricated metal products, except machinery and equipment										0.15			0.15
12	26	Manufacture of computer, electronic and optical products	7.50	41.35	3.03	0.06	3.10			0.21		43.93			99.17
13	27	Manufacture of electrical equipment		0.23	0.30	1.55			3.80			26.17			32.04
14	28	Manufacture of machinery and equipment n.e.c.		0.65	0.24	5.51			4.72			23.03			34.15
15	29	Manufacture of motor vehicles, trailers and semi-trailers										0.83			0.83
16	30	Manufacture of other transport equipment		0.09								5.98			6.07

Table A6: Exports of ICT-enabled services by Principal activity

Sl. No.	ISIC Code (2-Digit)	Principal Activity	Value of Exports (in INR Billion)													
			Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	All				
17	31	Manufacture of furniture						0.36								0.36
18	32	Other manufacturing		4.33	1.16			0.91					24.69			31.09
19	33	Repair and installation of machinery and equipment		0.09	0.07	0.00		0.10					0.74			1.00
20	35	Electricity, gas, steam and air conditioning supply											0.17			0.17
21	37	Sewerage											0.00			0.00
22	41	Construction of buildings		0.05	0.07			0.39					131.00			131.52
23	42	Civil engineering											25.19			25.19
24	43	Specialized construction activities											19.63			19.63
25	45	Wholesale and retail trade and repair of motor vehicles and motorcycles											0.01			0.01
26	46	Wholesale trade, except of motor vehicles and motorcycles		4.86				1.44					0.15			6.45
27	47	Retail trade, except of motor vehicles and motorcycles		0.86		0.04							2.14			3.04
28	51	Air transport								0.11						0.11
29	52	Warehousing and support activities for transportation		0.00												0.00

Table A6: Exports of ICT-enabled services by Principal activity

Sl. No.	ISIC Code (2-Digit)	Principal Activity	Value of Exports (in INR Billion)													
			Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	All				
30	55	Accommodation											1.65			1.65
31	58	Publishing activities	0.10	1.19	0.72	1.73				0.19				0.14		5.46
32	59	Motion picture, video and television programme production, sound recording and music publishing activities		0.57	0.10	12.55				0.14						22.88
33	60	Programming and broadcasting activities	4.05	2.94	1.43	7.60				0.01						20.92
34	61	Telecommunications	175.78	1.36	1.01	0.80				0.95					0.00	180.77
35	62	Computer programming, consultancy and related activities	3.86	3,959.74	15.21	9.01				332.50					0.00	4,523.69
36	63	Information service activities	5.81	1,001.12	1.23	402.37				106.44					0.56	1,643.89
37	64	Financial service activities, except insurance and pension funding		1.67	4.13					25.03						92.76
38	65	Insurance, reinsurance and pension funding, except compulsory social security		0.24		0.25										0.48
39	66	Activities auxiliary to financial service and insurance activities		30.60						0.10						94.08
40	69	Legal and accounting activities	0.16	0.01						31.98						32.15
41	70	Activities of head offices; management consultancy activities	10.21	51.89	0.19	4.03				3.99					0.00	123.35
42	71	Architectural and engineering activities; technical testing and analysis		5.18	0.37	1.89				0.10						234.05

Table A6: Exports of ICT-enabled services by Principal activity

Sl. No.	ISIC Code (2-Digit)	Principal Activity	Value of Exports (in INR Billion)										All
			Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services		
43	72	Scientific research and development		10.94	1.39	2.59	0.03	2.94	0.00	51.89		69.78	
44	73	Advertising and market research	0.00	14.01	4.52	0.02		16.46		0.17		35.18	
45	74	Other professional, scientific and technical activities		27.03	5.93	4.04	0.35	24.01	0.05	47.85		109.26	
46	77	Rental and leasing activities						1.08		0.01		1.09	
47	78	Employment activities		0.02				8.33		0.01		8.36	
48	79	Travel agency, tour operator, reservation service and related activities		0.02				0.56				0.58	
49	80	Security and investigation activities		0.00				0.01		6.12		6.13	
50	81	Services to buildings and landscape activities								3.10		3.10	
51	82	Office administrative, office support and other business support activities		27.72	0.07	0.32		250.79		1.49		280.40	
52	84	Public administration and defence; compulsory social security		0.12	0.06			0.22		0.87		1.27	
53	85	Education			0.00						2.51	2.51	
54	86	Human health activities				0.02						0.02	
55	88	Social work activities without accommodation						1.33				1.33	
56	90	Creative, arts and entertainment activities		0.61	0.25	0.12		0.38	0.67		0.01	2.02	

Table A6: Exports of ICT-enabled services by Principal activity

Sl. No.	ISIC Code (2-Digit)	Principal Activity	Value of Exports (in INR Billion)										All		
			Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services				
57	93	Sports activities and amusement and recreation activities		0.67	0.44				3.36						4.46
58	96	Other personal service activities		0.01	0.17	0.99			0.59			1.55	0.01		3.32
59	97	Activities of households as employers of domestic personnel				1.14									1.14
60	99	Activities of extraterritorial organizations and bodies							13.10			0.03			13.13
		Total	207.46	5,203.60	42.69	456.98	47.29	997.27	16.51	979.11	3.24				7,954.15

Table A7: Exports of ICT-enabled services by Principal activity

Sl. No.	ISIC Code (2-Digit)	Principal Activity	Value of Exports (in USD Million)										All			
			Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services					
1	5	Mining of coal and lignite											2.35			2.35
2	6	Extraction of crude petroleum and natural gas													0.11	4.09
3	7	Mining of metal ores		3.70												3.70
4	9	Mining support service activities											14.61			14.61
5	10	Manufacture of food products		16.36						58.28			26.58			101.22
6	11	Manufacture of beverages										1.65				1.65
7	18	Printing and reproduction of recorded media		176.46			4.41			128.41			204.56			513.84
8	20	Manufacture of chemicals and chemical products		4.95		9.24	0.91						0.52			15.63
9	22	Manufacture of rubber and plastics products											2.83			2.83
10	24	Manufacture of basic metals											0.00			0.00
11	25	Manufacture of fabricated metal products, except machinery and equipment											2.25			2.25
12	26	Manufacture of computer, electronic and optical products	112.63	620.93	45.50	0.84	46.58	3.18					659.66			1,489.32
13	27	Manufacture of electrical equipment		3.45	4.45	23.26				57.13			392.95			481.24
14	28	Manufacture of machinery and equipment n.e.c.		9.80	3.55	82.74				70.92			345.90			512.91
15	29	Manufacture of motor vehicles, trailers and semi-trailers											12.51			12.51
16	30	Manufacture of other transport equipment		1.34									89.79			91.12

Table A7: Exports of ICT-enabled services by Principal activity

Sl. No.	ISIC Code (2-Digit)	Principal Activity	Value of Exports (in USD Million)												
			Telecommunications	Computer Services (Including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	All			
17	31	Manufacture of furniture							5.46						5.46
18	32	Other manufacturing		64.99	17.46				13.61				370.79		466.85
19	33	Repair and installation of machinery and equipment		1.31	1.05	0.05			1.56				11.06		15.04
20	35	Electricity, gas, steam and air conditioning supply											2.60		2.60
21	37	Sewerage											0.00		0.00
22	41	Construction of buildings		0.78	1.11				5.86				1,967.36		1,975.12
23	42	Civil engineering											378.31		378.31
24	43	Specialized construction activities											294.86		294.86
25	45	Wholesale and retail trade and repair of motor vehicles and motorcycles											0.08		0.08
26	46	Wholesale trade, except of motor vehicles and motorcycles		73.01					21.60				2.21		96.82
27	47	Retail trade, except of motor vehicles and motorcycles		12.94		0.65							32.08		45.67
28	51	Air transport												1.63	1.63
29	52	Warehousing and support activities for transportation		0.06											0.06
30	55	Accommodation											24.73		24.73

Table A7: Exports of ICT-enabled services by Principal activity

Sl. No.	ISIC Code (2-Digit)	Principal Activity	Value of Exports (in USD Million)									
			Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	All
31	58	Publishing activities	1.43	17.89	10.75	26.01		2.86		21.00	2.12	82.07
32	59	Motion picture, video and television programme production, sound recording and music publishing activities		8.62	1.49	188.42		2.06	140.81	2.22		343.62
33	60	Programming and broadcasting activities	60.78	44.21	21.45	114.14		0.08	73.44			314.10
34	61	Telecommunications	2,639.87	20.45	15.13	11.95		14.21		13.15	0.00	2,714.77
35	62	Computer programming, consultancy and related activities	58.00	59,466.46	228.42	135.33		4,993.40	2.11	2,914.49	0.02	67,935.68
36	63	Information service activities	87.19	15,034.53	18.47	6,042.66		1,598.46	14.87	1,803.04	8.45	24,687.49
37	64	Financial service activities, except insurance and pension funding		25.09	62.04			930.05				1,393.12
38	65	Insurance, reinsurance and pension funding, except compulsory social security		3.55		3.72						7.27
39	66	Activities auxiliary to financial service and insurance activities		459.61				948.15	3.50			1,412.83
40	69	Legal and accounting activities	2.43	0.10			480.29					482.82
41	70	Activities of head offices; management consultancy activities	153.28	779.23	2.87	60.51		758.25	0.85	37.65	0.01	1,852.49
42	71	Architectural and engineering activities; technical testing and analysis		77.73	5.51	28.40		30.15		3,371.59		3,514.95

Table A7: Exports of ICT-enabled services by Principal activity

Sl. No.	ISIC Code (2-Digit)	Principal Activity	Value of Exports (in USD Million)									
			Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	All
43	72	Scientific research and development		164.35	20.82	38.88	0.47	44.08	0.05	779.30		1,047.95
44	73	Advertising and market research	0.03	210.37	67.94	0.33		247.15		2.51		528.31
45	74	Other professional, scientific and technical activities	405.99	89.00	60.69	5.25	360.56	0.71	718.61		1,640.81	
46	77	Rental and leasing activities						16.25		0.16		16.41
47	78	Employment activities		0.30				125.06		0.15		125.51
48	79	Travel agency, tour operator, reservation service and related activities		0.29				8.42				8.71
49	80	Security and investigation activities		0.02				0.10		91.90		92.03
50	81	Services to buildings and landscape activities								46.58		46.58
51	82	Office administrative, office support and other business support activities		416.33	1.09	4.75		3,766.35		22.42		4,210.94
52	84	Public administration and defence; compulsory social security		1.84	0.92			3.33		13.00		19.09
53	85	Education			0.00						37.69	37.69
54	86	Human health activities				0.27						0.27
55	88	Social work activities without accommodation						20.01				20.01
56	90	Creative, arts and entertainment activities		9.13	3.71	1.82		5.65	10.00		0.09	30.40

Table A7: Exports of ICT-enabled services by Principal activity

Sl. No.	ISIC Code (2-Digit)	Principal Activity	Value of Exports (in USD Million)											
			Telecommunications	Computer Services (including Computer Software)	Sales and marketing services, not including trade and leasing services	Information Services	Financial services	Management, administration and back office services	Licensing services	Engineering, related technical services and R&D	Education and training services	All		
57	93	Sports activities and amusement and recreation activities		10.06	6.54					50.39				66.99
58	96	Other personal service activities		0.14	2.59	14.85				8.79		23.27	0.17	49.81
59	97	Activities of households as employers of domestic personnel				17.18								17.18
60	99	Activities of extraterritorial organizations and bodies								196.71		0.46		197.17
		Total	3,115.64	78,146.38	641.11	6,862.79	710.12	14,976.82	247.97	14,704.07	48.66			1,19,453.57

Table A8: Percentage distribution of number of ICT-enabled services exporting enterprises by enterprise size

Sl. No	Category of Service	Enterprise size				All
		(0 - 9)	(10 - 49)	(50 - 249)	(>250)	
1	Telecommunications	4.2	14.0	34.7	47.0	100.0
2	Computer Services (including Computer Software)	5.2	23.8	36.7	34.3	100.0
3	Sales and marketing services, not including trade and leasing services	10.1	21.1	38.8	30.0	100.0
4	Information Services	7.7	26.7	35.3	30.2	100.0
5	Financial services		39.7	2.3	58.0	100.0
6	Management, administration and back office services	8.3	14.8	21.0	55.9	100.0
7	Licensing services	8.3	59.9	20.4	11.5	100.0
8	Engineering, related technical services and R&D	2.1	16.8	30.9	50.2	100.0
9	Education and training services		11.2	29.2	59.6	100.0
	All	5.4	22.6	33.6	38.4	100.0

Table A9: Percentage distribution of number of ICT-enabled services exporting enterprises by category of service and turnover

Sl. No.	Category of Service	Turnover Class*				Total
		Micro	Small	Medium	Large	
1	Telecommunications	8.8	36.8	18.6	35.8	100.0
2	Computer Services (including Computer Software)	29.1	48.0	11.5	11.4	100.0
3	Sales and marketing services, not including trade and leasing services	17.2	55.5	16.7	10.6	100.0
4	Information Services	33.4	43.6	11.8	11.3	100.0
5	Financial services	4.6	34.4	24.4	36.6	100.0
6	Management, administration and back office services	14.5	38.9	18.5	28.1	100.0
7	Licensing services	22.9	43.3	12.1	21.7	100.0
8	Engineering, related technical services and R&D	10.2	43.7	19.7	26.5	100.0
9	Education and training services	11.2	29.2	25.8	33.7	100.0
	All	24.3	45.6	13.9	16.2	100.0

* Note: Using Annual Turnover, the enterprises have been classified into micro, small, medium and large with the following criteria: Micro <= 50 Million INR; Small (> 50 Million INR and <= 750 Million INR); Medium (> 750 Million INR and <= 2500 Million INR); Large > 2500 Million INR

Table A10: Percentage contribution of different types of enterprises (by employment size) to Export of Potential ICT-enabled services

Sl. No	Category of Service	Enterprise size				All
		(0 - 9)	(10 - 49)	(50 - 249)	(>250)	
1	Telecommunications	1.0	1.2	10.6	87.3	100.0
2	Computer Services (including Computer Software)	0.0	0.3	2.4	97.2	100.0
3	Sales and marketing services, not including trade and leasing services	0.1	1.0	4.1	94.9	100.0
4	Information Services	0.4	1.2	6.9	91.5	100.0
5	Financial services		12.5	0.3	87.2	100.0
6	Management, administration and back office services	0.4	0.2	1.6	97.8	100.0
7	Licensing services	0.1	26.3	8.4	65.3	100.0
8	Engineering, related technical services and R&D	0.0	0.9	4.8	94.2	100.0
9	Education and training services		2.4	10.4	87.2	100.0
	All	0.1	0.6	2.9	96.4	100.0

Table A11: Percentage contribution of different types of enterprises (by employment size) to Export of ICT-enabled (Mode 1) services

Sl. No	Category of Service	Enterprise size				All
		(0 - 9)	(10 - 49)	(50 - 249)	(>250)	
1	Telecommunications	1.0	1.2	11.2	86.6	100.0
2	Computer Services (including Computer Software)	0.0	0.4	3.1	96.4	100.0
3	Sales and marketing services, not including trade and leasing services	0.2	2.7	11.5	85.7	100.0
4	Information Services	0.4	1.2	6.8	91.5	100.0
5	Financial services		12.5	0.3	87.2	100.0
6	Management, administration and back office services	0.4	0.2	1.8	97.6	100.0
7	Licensing services	0.1	26.3	8.4	65.3	100.0
8	Engineering, related technical services and R&D	0.0	0.9	5.1	94.0	100.0
9	Education and training services		2.5	10.0	87.5	100.0
	All	0.1	0.7	3.5	95.6	100.0

Table A12: Percentage contribution of different types of enterprises (by Enterprise Turnover) to Export of Potential ICT-enabled services

Sl. No.	Category of Service	Turnover Class*				Total
		Micro	Small	Medium	Large	
1	Telecommunications	0.1	3.2	7.1	89.6	100.0
2	Computer Services (including Computer Software)	0.2	3.9	5.3	90.5	100.0
3	Sales and marketing services, not including trade and leasing services	0.0	4.0	6.6	89.3	100.0
4	Information Services	0.8	10.3	16.5	72.4	100.0
5	Financial services	0.1	9.2	17.4	73.4	100.0
6	Management, administration and back office services	0.1	2.4	5.2	92.3	100.0
7	Licensing services	0.2	8.7	58.0	33.1	100.0
8	Engineering, related technical services and R&D	0.1	5.5	10.0	84.5	100.0
9	Education and training services	2.4	4.9	70.7	22.0	100.0
	All	0.2	4.1	6.4	89.3	100.0

* Note: Using Annual Turnover, the enterprises have been classified into micro, small, medium and large with the following criteria: Micro \leq 50 Million INR; Small ($>$ 50 Million INR and \leq 750 Million INR); Medium ($>$ 750 Million INR and \leq 2500 Million INR); Large $>$ 2500 Million INR

Table A13: Percentage contribution of different types of enterprises (by Enterprise Turnover) to Export of ICT-enabled (Mode 1) services

Sl. No.	Category of Service	Turnover Class*				Total
		Micro	Small	Medium	Large	
1	Telecommunications	0.1	3.3	5.8	90.8	100.0
2	Computer Services (including Computer Software)	0.3	5.1	6.8	87.9	100.0
3	Sales and marketing services, not including trade and leasing services	0.1	11.5	18.5	69.9	100.0
4	Information Services	0.8	10.2	16.6	72.4	100.0
5	Financial services	0.1	9.2	17.4	73.4	100.0
6	Management, administration and back office services	0.1	2.7	5.6	91.6	100.0
7	Licensing services	0.2	8.7	58.0	33.1	100.0
8	Engineering, related technical services / and R&D	0.1	5.6	10.5	83.8	100.0
9	Education and training services	2.5	5.1	72.2	20.3	100.0
	All	0.2	5.0	7.7	87.0	100.0

* Note: Using Annual Turnover, the enterprises have been classified into micro, small, medium and large with the following criteria: Micro \leq 50 Million INR; Small ($>$ 50 Million INR and \leq 750 Million INR); Medium ($>$ 750 Million INR and \leq 2500 Million INR); Large $>$ 2500 Million INR

Table A14: Major Service category of the Enterprise wise percentage distribution of Male – Female and Domestic and Outside India Employment of Potential ICT-enabled Services during 2017-18

Sl. No.	Service Category	Total	Male (%)	Female (%)
1	Telecommunications	2,25,771	78.9	21.1
2	Computer services (including computer software)	26,41,522	69.1	30.9
3	Sales and marketing services, not including trade and leasing services	33,786	74.0	26.0
4	Information services	3,93,465	63.2	36.8
5	Financial services	97,973	78.1	21.9
6	Management, administration and back office services	10,22,628	68.2	31.8
7	Licensing services	5,071	78.4	21.6
8	Engineering, related technical services and R&D	5,86,260	88.5	11.5
9	Education and training services	1,37,261	86.3	13.7
10	TOTAL	52,51,011	72.0	28.0

Table A15: Enterprise Employment Size and Turnover wise Domestic and Outside India Employment of Potential ICT-enabled Services during 2017-18

Employment Size	Offshore	Onsite	Enterprise Turnover	Offshore	Onsite
0-9	98.8	1.2	Micro (< 50 Million INR)	95.2	4.8
10-49	97.9	2.1	Small (50 - 750 Million INR)	96.8	3.2
50-249	94.9	5.1	Medium (0.75 - 2.5 Billion INR)	94.4	5.6
>=250	87.1	12.9	Large (>2.5 Billion INR)	85.9	14.1
Total	87.4	12.6	Total	87.4	12.6

Service Categories	Value of Export	
	INR (Billion)	USD (Million)
Telecommunication	207.46	3,115.64
Computer Services	5,203.60	78,146.38
Computer software (includes Software downloads, Software originals, On-line games and On-line software)	2,122.95	31,881.93
IT consulting and support services	1,168.45	17,547.48
IT design and development services for applications	1,495.39	22,457.40
Other computer services	416.81	6,259.56
Sales and marketing services	42.69	641.11
Advertising services	3.37	50.68
Market research and public opinion polling services	10.95	164.45
Other sales and marketing services	28.37	425.98
Information Services	456.98	6,862.79
Audiovisual services (includes Audio-visual and related services; On-line audio content; On-line video content; Radio and television broadcast originals; Home programme distribution services basic programming package; Home programme distribution services, discretionary programming package; Home programme distribution services, pay per view; Radio and television channel programmes)	62.36	936.47
Other information services	394.62	5,926.31
Financial services	47.29	710.12
Management, administration and back office services	997.27	14,976.82
Legal services	11.37	170.80
Accounting; auditing; bookkeeping; and tax consulting services (includes Accounting, auditing and bookkeeping services; Tax consultancy and preparation services; Insolvency and receivership services)	152.70	2,293.27
Business and management consulting and public relations services (includes Management consulting and management services; Business consulting services; Other management services, except construction project management services)	186.56	2,801.72
Other business services	646.64	9,711.03
Licensing services	16.51	247.97
Engineering, related technical services and R&D	979.11	14,704.07
Research and development originals	56.04	841.60
Architectural services	0.59	8.89
Engineering services	636.91	9,564.99
Scientific and other technical services (includes Surface surveying and map-making services; Weather forecasting and meteorological services; Technical testing and analysis services; Scientific and technical consulting services n.e.c)	12.75	191.47
Other research & development and related technical services	272.82	4,097.13
Education and training services	3.24	48.66
TOTAL	7,954.15	1,19,453.57

Table A17: Major Service category of the Enterprise wise Export Intensity of Potential ICT-enabled Services during 2017-18

Sl. No.	SERVICE	Export Intensity
1	Telecommunications	13.0
2	Computer services (including computer software)	87.9
3	Sales and marketing services, not including trade and leasing services	32.5
4	Information services	58.3
5	Financial services	4.7
6	Management, administration and back office services	78.9
7	Licensing services	12.7
8	Engineering, related technical services and R&D	32.2
9	Education and training services	3.7
10	TOTAL	56.2

Export Intensity (= Export of Services/Services Turnover)

Sl. No.	State	Value of Export		% Share of Export
		INR (Billion)	USD (Billion)	
1	Andaman and Nicobar Islands	0.01	0.00	0.0
2	Andhra Pradesh	41.55	0.62	0.5
3	Arunachal Pradesh	0.02	0.00	0.0
4	Assam	0.03	0.00	0.0
5	Bihar	0.08	0.00	0.0
6	Chandigarh	31.01	0.47	0.4
7	Chhattisgarh	0.33	0.00	0.0
8	Dadra & Nagar Haveli	0.01	0.00	0.0
9	Daman & Diu	0.00	0.00	0.0
10	Delhi	225.08	3.38	2.8
11	Goa	1.26	0.02	0.0
12	Gujarat	119.76	1.80	1.5
13	Haryana	451.70	6.78	5.7
14	Himachal Pradesh	3.62	0.05	0.0
15	Jammu & Kashmir	0.04	0.00	0.0
16	Jharkhand	0.39	0.01	0.0
17	Karnataka	2,491.54	37.42	31.3
18	Kerala	105.78	1.59	1.3
19	Lakshadweep	0.89	0.01	0.0
20	Madhya Pradesh	77.54	1.16	1.0
21	Maharashtra	1,672.64	25.12	21.0
22	Manipur	0.00	0.00	0.0
23	Meghalaya	0.00	0.00	0.0
24	Mizoram	0.00	0.00	0.0
25	Nagaland	0.03	0.00	0.0
26	Odisha	30.25	0.45	0.4
27	Puducherry	1.75	0.03	0.0
28	Punjab	30.28	0.45	0.4
29	Rajasthan	16.02	0.24	0.2
30	Sikkim	2.39	0.04	0.0
31	Tamil Nadu	1,128.74	16.95	14.2
32	Telangana	910.00	13.67	11.4
33	Tripura	2.43	0.04	0.0
34	Uttar Pradesh	331.57	4.98	4.2
35	Uttarakhand	1.63	0.02	0.0
36	West Bengal	275.77	4.14	3.5
	TOTAL	7,954.15	119.45	100

Table A19: Exports of Potential ICT-enabled Services in the Top Exporting States during 2017-18

State	Value of Export		
	INR (Billion)	USD (Million)	% Share
Karnataka	2,491.54	37,417.29	100
Computer services (including computer software)	1,750.14	26,283.21	70.24
Engineering, related technical services and R&D	325.24	4,884.37	13.05
Management, administration and back office services	276.08	4,146.04	11.08
Information services	80.64	1,211.06	3.24
Telecommunications	39.15	588.02	1.57
Sales and marketing services, not including trade and leasing services	12.22	183.47	0.49
Financial services	6.76	101.54	0.27
Licensing services	1.04	15.60	0.04
Education and training services	0.27	3.99	0.01
Maharashtra	1,672.64	25,119.30	100
Computer services (including computer software)	1,042.49	15,655.93	62.33
Management, administration and back office services	243.98	3,664.08	14.59
Engineering, related technical services and R&D	170.17	2,555.58	10.17
Information services	138.23	2,075.92	8.26
Telecommunications	30.17	453.16	1.80
Financial services	23.84	358.06	1.43
Sales and marketing services, not including trade and leasing services	12.52	188.06	0.75
Licensing services	11.14	167.29	0.67
Education and training services	0.08	1.23	0.00
Tamil Nadu	1,128.74	16,951.20	100
Computer services (including computer software)	809.92	12,163.19	71.75
Engineering, related technical services and R&D	127.80	1,919.34	11.32
Management, administration and back office services	123.68	1,857.33	10.96
Information services	38.10	572.11	3.38
Telecommunications	22.14	332.53	1.96
Sales and marketing services, not including trade and leasing services	4.07	61.11	0.36
Financial services	1.36	20.40	0.12
Licensing services	0.88	13.26	0.08
Education and training services	0.80	11.94	0.07
Telangana	910.00	13,666.13	100
Computer services (including computer software)	604.41	9,076.91	66.42
Management, administration and back office services	111.72	1,677.72	12.28
Information services	108.58	1,630.62	11.93
Engineering, related technical services and R&D	68.23	1,024.63	7.50
Financial services	7.92	118.94	0.87
Sales and marketing services, not including trade and leasing services	7.23	108.53	0.79

Table A19: Exports of Potential ICT-enabled Services in the Top Exporting States during 2017-18

State	Value of Export			
	Service Category	INR (Billion)	USD (Million)	% Share
	Telecommunications	1.00	15.07	0.11
	Licensing services	0.85	12.71	0.09
	Education and training services	0.07	1.00	0.01
Haryana		451.70	6,783.49	100
	Computer services (including computer software)	202.49	3,040.89	44.83
	Management, administration and back office services	118.50	1,779.67	26.24
	Telecommunications	61.92	929.92	13.71
	Engineering, related technical services and R&D	34.19	513.39	7.57
	Information services	27.86	418.45	6.17
	Sales and marketing services, not including trade and leasing services	4.10	61.53	0.91
	Financial services	2.62	39.31	0.58
	Education and training services	0.02	0.34	0.00
Uttar Pradesh		331.57	4,979.51	100
	Computer services (including computer software)	134.63	2,021.88	40.60
	Engineering, related technical services and R&D	128.44	1,928.84	38.74
	Information services	32.31	485.27	9.75
	Management, administration and back office services	19.21	288.42	5.79
	Telecommunications	13.45	202.02	4.06
	Licensing services	1.72	25.86	0.52
	Sales and marketing services, not including trade and leasing services	1.10	16.57	0.33
	Financial services	0.71	10.65	0.21
West Bengal		275.77	4,141.50	100
	Computer services (including computer software)	215.15	3,231.01	78.02
	Management, administration and back office services	27.18	408.16	9.86
	Engineering, related technical services and R&D	14.01	210.40	5.08
	Telecommunications	8.69	130.53	3.15
	Information services	8.50	127.63	3.08
	Financial services	1.49	22.35	0.54
	Licensing services	0.65	9.72	0.23
	Education and training services	0.11	1.68	0.04
	Sales and marketing services, not including trade and leasing services	0.00	0.02	0.00
Grand Total		7,954.15	1,19,453.57	100
TOP 7 States		7,261.96	1,09,058.43	91.30

Table A20: Distribution of Potential ICT-enabled Services rendered from Subsidiaries/Associates Abroad during 2017-18

Service category	Value of Trade (in Million INR)			Value of Trade (in Million USD)					
	Country	Locally	To India	To Other Countries	Total	Locally	To India	To Other Countries	Total
Telecommunications									
AUSTRALIA		309.8	0.0	223.8	533.5	4.7	0.0	3.4	8.0
BELGIUM		23.4	0.0	124.3	147.7	0.4	0.0	1.9	2.2
BERMUDA		352.1	37.1	10,822.2	11,211.3	5.3	0.6	162.5	168.4
CHINA P RP		0.1	0.0	3.0	3.1	0.0	0.0	0.0	0.0
FRANCE		653.6	2,157.3	648.1	3,458.9	9.8	32.4	9.7	51.9
GERMANY		377.0	0.0	1,402.2	1,779.2	5.7	0.0	21.1	26.7
HONG KONG		391.1	0.0	2,207.5	2,598.6	5.9	0.0	33.2	39.0
IRELAND		1,059.4	88.9	6,594.3	7,742.6	15.9	1.3	99.0	116.3
ITALY		526.3	0.7	473.3	1,000.2	7.9	0.0	7.1	15.0
JAPAN		63.7	0.0	363.9	427.6	1.0	0.0	5.5	6.4
KOREA RP		291.8	0.0	2.5	294.3	4.4	0.0	0.0	4.4
MAURITIUS		496.0	0.0	0.0	496.0	7.4	0.0	0.0	7.4
NETHERLAND		435.9	0.0	195.2	631.1	6.5	0.0	2.9	9.5
NEW ZEALAND		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NIGERIA		0.4	0.0	0.0	0.4	0.0	0.0	0.0	0.0
PHILIPPINES		0.0	0.0	2,440.1	2,440.1	0.0	0.0	36.6	36.6
POLAND		0.8	0.0	21.4	22.2	0.0	0.0	0.3	0.3
SINGAPORE		812.5	2,473.5	2,815.7	6,101.7	12.2	37.1	42.3	91.6
SPAIN		55.6	0.0	187.6	243.2	0.8	0.0	2.8	3.7
SWEDEN		9.3	0.0	50.2	59.5	0.1	0.0	0.8	0.9
SWITZERLAND		0.0	0.0	4.2	4.2	0.0	0.0	0.1	0.1
TAIWAN		215.7	0.0	3.2	219.0	3.2	0.0	0.0	3.3
U K		4,337.4	159.7	9,230.9	13,728.1	65.1	2.4	138.6	206.2
U S A		4,290.6	1,629.5	6,479.5	12,399.6	64.	24.5	97.3	186.2

Table A20: Distribution of Potential ICT-enabled Services rendered from Subsidiaries/Associates Abroad during 2017-18									
Service category	Value of Trade (in Million INR)			Value of Trade (in Million USD)					
	Locally	To India	To Other Countries	Locally	To India	To Other Countries	Total	Total	
Country									
EGYPT A RP	2.4	0.0	11.0	0.0	0.0	0.2	13.4	0.0	0.2
Telecommunications Total	14,704.8	6,546.6	44,303.9	220.8	98.3	665.3	65,555.3	98.3	984.5
Computer services (including computer software)									
ALGERIA	0.0	0.0	5.6	0.0	0.0	0.1	5.6	0.0	0.1
ANGOLA	0.0	0.0	4.1	0.0	0.0	0.1	4.1	0.0	0.1
ARGENTINA	102.3	0.0	163.1	1.5	0.0	2.4	265.4	0.0	4.0
AUSTRALIA	18,965.9	1,270.6	2,857.5	284.8	19.1	42.9	23,093.9	19.1	346.8
AUSTRIA	254.3	0.0	1.0	3.8	0.0	0.0	255.3	0.0	3.8
BAHARAIN	190.0	0.0	554.2	2.9	0.0	8.3	744.1	0.0	11.2
BELGIUM	1,664.4	0.0	455.2	25.0	0.0	6.8	2,119.5	0.0	31.8
BELIZE	0.0	0.0	4,914.0	0.0	0.0	73.8	4,914.0	0.0	73.8
BERMUDA	1,691.5	0.0	0.0	25.4	0.0	0.0	1,691.5	0.0	25.4
BRAZIL	4,821.8	1.7	1,431.2	72.4	0.0	21.5	6,254.7	0.0	93.9
CANADA	15,808.0	53.0	8,688.9	237.4	0.8	130.5	24,549.9	0.8	368.7
CHANNEL IS	0.0	268.4	0.0	0.0	4.0	0.0	268.4	4.0	4.0
CHILE	945.2	0.0	26.1	14.2	0.0	0.4	971.2	0.0	14.6
CHINA P RP	14,251.8	8.4	3,999.8	214.0	0.1	60.1	18,260.1	0.1	274.2
COLOMBIA	40.2	0.0	0.0	0.6	0.0	0.0	40.2	0.0	0.6
CYPRUS	0.0	0.0	462.0	0.0	0.0	6.9	462.0	0.0	6.9
CZECH REPUBLIC	128.8	0.0	166.8	1.9	0.0	2.5	295.6	0.0	4.4
DENMARK	0.0	0.0	9.6	0.0	0.0	0.1	9.6	0.0	0.1
FINLAND	353.0	0.0	267.2	5.3	0.0	4.0	620.2	0.0	9.3
FRANCE	681.8	0.0	447.1	10.2	0.0	6.7	1,128.8	0.0	17.0
GERMANY	9,715.0	13.4	17,865.2	145.9	0.2	268.3	27,593.5	0.2	414.4
GREECE	553.9	0.0	4.8	8.3	0.0	0.1	558.7	0.0	8.4

Table A20: Distribution of Potential ICT-enabled Services rendered from Subsidiaries/Associates Abroad during 2017-18

Service category	Value of Trade (in Million INR)			Value of Trade (in Million USD)			
	Locally	To India	To Other Countries	Locally	To India	To Other Countries	Total
HONG KONG	465.4	1.8	285.5	7.0	0.0	4.3	11.3
HUNGARY	67.7	0.0	1,300.7	1.0	0.0	19.5	20.6
INDONESIA	0.0	0.0	928.0	0.0	0.0	13.9	13.9
IRELAND	2,219.2	46.3	792.9	33.3	0.7	11.9	45.9
ISRAEL	2,473.0	0.0	361.0	37.1	0.0	5.4	42.6
ITALY	91.6	0.0	0.2	1.4	0.0	0.0	1.4
JAPAN	7,595.7	46.8	1,349.8	114.1	0.7	20.3	135.0
KAZAKHSTAN	0.0	0.0	6.6	0.0	0.0	0.1	0.1
KENYA	158.1	20.7	41.5	2.4	0.3	0.6	3.3
KUWAIT	0.0	0.0	59.9	0.0	0.0	0.9	0.9
LUXEMBOURG	661.6	6.4	68.3	9.9	0.1	1.0	11.1
MALAYSIA	3,007.9	26.6	585.3	45.2	0.4	8.8	54.4
MAURITIUS	0.0	0.0	12.3	0.0	0.0	0.2	0.2
MEXICO	2,520.4	15.1	4,836.5	37.9	0.2	72.6	110.7
MYANMAR	0.0	0.0	1.9	0.0	0.0	0.0	0.0
NETHERLAND	11,756.9	0.4	51,819.0	176.6	0.0	778.2	954.8
NETHERLANDANTIL	67.9	0.0	0.0	1.0	0.0	0.0	1.0
NEW ZEALAND	1,943.7	0.0	40.5	29.2	0.0	0.6	29.8
NIGERIA	73.1	0.0	0.0	1.1	0.0	0.0	1.1
NORWAY	0.0	0.0	538.7	0.0	0.0	8.1	8.1
OMAN	46,554.5	0.0	2,460.0	699.1	0.0	36.9	736.1
PHILIPPINES	327.6	9.1	5,992.7	4.9	0.1	90.0	95.1
POLAND	270.1	0.0	4,210.0	4.1	0.0	63.2	67.3
PORTUGAL	0.0	0.0	1,592.7	0.0	0.0	23.9	23.9
QATAR	483.4	0.0	933.0	7.3	0.0	14.0	21.3

Table A20: Distribution of Potential ICT-enabled Services rendered from Subsidiaries/Associates Abroad during 2017-18									
Service category	Value of Trade (in Million INR)			Value of Trade (in Million USD)					
	Locally	To India	To Other Countries	Locally	To India	To Other Countries	Total	Total	Total
ROMANIA	0.0	0.0	2,865.2	0.0	0.0	43.0	2,865.2	0.0	43.0
RUSSIA	54.0	0.0	0.0	0.8	0.0	0.0	54.0	0.8	0.0
SAUDI ARAB	2,321.1	0.0	12,402.9	34.9	0.0	186.3	14,724.1	34.9	221.1
SINGAPORE	21,582.2	1,001.5	9,401.8	324.1	15.0	141.2	31,985.4	324.1	480.3
SOUTH AFRICA	7,254.0	3.8	3,369.8	108.9	0.1	50.6	10,627.5	108.9	159.6
SPAIN	2,165.6	0.0	808.7	32.5	0.0	12.1	2,974.2	32.5	44.7
SRI LANKA DSR	0.0	8.9	0.0	0.0	0.1	0.0	8.9	0.0	0.1
SWAZILAND	0.0	0.0	20.2	0.0	0.0	0.3	20.2	0.0	0.3
SWEDEN	3,555.6	0.0	409.0	53.4	0.0	6.1	3,964.6	53.4	59.5
SWITZERLAND	2,322.9	144.6	2,715.5	34.9	2.2	40.8	5,183.0	34.9	77.8
TAIWAN	0.4	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0
THAILAND	929.1	5.6	80.4	14.0	0.1	1.2	1,015.1	14.0	15.2
TURKEY	211.2	0.0	0.0	3.2	0.0	0.0	211.2	3.2	3.2
U ARAB EMTS	7,056.0	1,087.2	12,518.8	106.0	16.3	188.0	20,662.1	106.0	310.3
U K	53,578.7	9,624.3	18,049.3	804.6	144.5	271.1	81,252.2	804.6	1,220.2
U S A	9,61,181.4	13,529.0	1,59,625.5	14,434.8	203.2	2,397.2	11,34,335.1	14,434.8	17,035.2
UGANDA	0.0	2.8	0.0	0.0	0.0	0.0	2.8	0.0	0.0
Computer services (including computer software) Total	12,13,117.5	27,196.2	3,42,807.1	18,218.3	408.4	5,148.2	15,83,120.0	18,218.3	23,774.9
Sales and marketing services, not including trade and leasing services									
AUSTRALIA	0.0	28.8	0.0	0.0	0.4	0.0	28.8	0.0	0.4
BELGIUM	80.4	0.0	25.5	1.2	0.0	0.4	105.9	1.2	1.6
MAURITIUS	0.0	25.7	0.0	0.0	0.4	0.0	25.7	0.0	0.4
SINGAPORE	0.0	29.0	0.0	0.0	0.4	0.0	29.0	0.0	0.4

Table A20: Distribution of Potential ICT-enabled Services rendered from Subsidiaries/Associates Abroad during 2017-18											
Service category	Value of Trade (in Million INR)						Value of Trade (in Million USD)				
	Country	Locally	To India	To Other Countries	Total		Locally	To India	To Other Countries	Total	
	SOUTH AFRICA	0.0	87.7	0.0	87.7		0.0	1.3	0.0	1.3	
	SRI LANKA DSR	43.9	1.8	4.1	49.7		0.7	0.0	0.1	0.7	
	U ARAB EMTS	59.7	16.0	0.5	76.2		0.9	0.2	0.0	1.1	
	U K	0.0	23.5	16.2	39.7		0.0	0.4	0.2	0.6	
	U S A	195.1	1,512.1	5,084.4	6,791.5		2.9	22.7	76.4	102.0	
	Sales and marketing services, not including trade and leasing services Total	379.1	1,724.5	5,130.7	7,234.2		5.7	25.9	77.1	108.6	
	Information services										
	AUSTRALIA	40.4	0.0	61.2	101.6		0.6	0.0	0.9	1.5	
	BAHARAIN	27.5	0.0	0.0	27.5		0.4	0.0	0.0	0.4	
	BRAZIL	2,603.9	681.5	0.0	3,285.4		39.1	10.2	0.0	49.3	
	CANADA	3,883.7	0.0	0.0	3,883.7		58.3	0.0	0.0	58.3	
	CHINA P RP	1,753.7	253.3	139.3	2,146.3		26.3	3.8	2.1	32.2	
	CONGO D. REP.	14.5	0.0	0.0	14.5		0.2	0.0	0.0	0.2	
	CYPRUS	12.4	10.8	22.0	45.1		0.2	0.2	0.3	0.7	
	FRANCE	0.1	0.0	0.0	0.1		0.0	0.0	0.0	0.0	
	GERMANY	3,563.9	6,667.6	109.4	10,340.9		53.5	100.1	1.6	155.3	
	INDONESIA	1,161.5	0.0	0.0	1,161.5		17.4	0.0	0.0	17.4	
	JAMAICA	324.8	0.0	1,499.7	1,824.5		4.9	0.0	22.5	27.4	
	JAPAN	1,275.9	0.0	5.5	1,281.4		19.2	0.0	0.1	19.2	
	KOREA RP	624.5	0.0	7.3	631.8		9.4	0.0	0.1	9.5	
	MADAGASCAR	17.3	0.0	0.0	17.3		0.3	0.0	0.0	0.3	
	MALAYSIA	1,329.5	823.4	52.2	2,205.1		20.0	12.4	0.8	33.1	
	MAURITIUS	1,320.5	0.0	0.0	1,320.5		19.8	0.0	0.0	19.8	
	MEXICO	979.3	946.8	84.1	2,010.2		14.7	14.2	1.3	30.2	

Table A20: Distribution of Potential ICT-enabled Services rendered from Subsidiaries/Associates Abroad during 2017-18										
Service category	Value of Trade (in Million INR)					Value of Trade (in Million USD)				
	Country	Locally	To India	To Other Countries	Total	Locally	To India	To Other Countries	Total	
	NETHERLAND	204.8	2.6	7,506.5	7,713.9	3.1	0.0	112.7	115.8	
	NIGERIA	247.3	0.0	0.0	247.3	3.7	0.0	0.0	3.7	
	PHILIPPINES	0.0	1,367.6	0.0	1,367.6	0.0	20.5	0.0	20.5	
	SINGAPORE	351.8	355.9	1,168.7	1,876.4	5.3	5.3	17.6	28.2	
	SOUTH AFRICA	617.9	0.0	0.0	617.9	9.3	0.0	0.0	9.3	
	SWEDEN	137.5	410.7	0.0	548.2	2.1	6.2	0.0	8.2	
	THAILAND	1,332.2	104.6	0.0	1,436.8	20.0	1.6	0.0	21.6	
	U ARAB EMTS	4,818.3	4,635.7	1,950.1	11,404.0	72.4	69.6	29.3	171.3	
	U K	3,947.4	9.7	986.4	4,943.5	59.3	0.1	14.8	74.2	
	U S A	93,444.6	63,034.3	9,391.0	1,65,869.9	1,403.3	946.6	141.0	2,491.0	
	VIETNAM SOC REP	3.7	0.0	0.0	3.7	0.1	0.0	0.0	0.1	
	Information services Total	1,24,038.6	79,304.4	22,983.4	2,26,326.4	1,862.8	1,191.0	345.2	3,398.9	
	Financial services									
	BANGLADESH	188.0	0.0	0.0	188.0	2.8	0.0	0.0	2.8	
	MAURITIUS	425.8	0.0	314.0	739.8	6.4	0.0	4.7	11.1	
	NEPAL	84.9	0.0	0.0	84.9	1.3	0.0	0.0	1.3	
	SINGAPORE	708.1	0.0	0.0	708.1	10.6	0.0	0.0	10.6	
	SRI LANKA DSR	42.3	0.0	0.0	42.3	0.6	0.0	0.0	0.6	
	U K	8.6	0.0	0.0	8.6	0.1	0.0	0.0	0.1	
	U S A	381.6	0.0	334.8	716.4	5.7	0.0	5.0	10.8	
	Financial services Total	1,839.2	0.0	648.8	2,488.0	27.6	0.0	9.7	37.4	
	Management, administration and back office services									
	ARGENTINA	0.0	607.9	0.0	607.9	0.0	9.1	0.0	9.1	
	AUSTRALIA	0.0	10.7	35.7	46.5	0.0	0.2	0.5	0.7	

Table A20: Distribution of Potential ICT-enabled Services rendered from Subsidiaries/Associates Abroad during 2017-18												
Service category	Value of Trade (in Million INR)						Value of Trade (in Million USD)					
	Country	Locally	To India	To Other Countries	Total		Locally	To India	To Other Countries	Total		
	AUSTRIA	0.0	0.0	0.7	0.7		0.0	0.0	0.0	0.0	0.0	
	BELGIUM	0.0	0.0	6.0	6.0		0.0	0.0	0.0	0.1	0.1	
	CANADA	0.0	0.0	273.3	273.3		0.0	0.0	0.0	4.1	4.1	
	CHINA P RP	0.0	192.8	3.2	196.0		0.0	2.9	0.0	0.0	2.9	
	CZECH REPUBLIC	0.0	0.0	0.2	0.2		0.0	0.0	0.0	0.0	0.0	
	FRANCE	0.0	0.0	26.5	26.5		0.0	0.0	0.0	0.4	0.4	
	GERMANY	0.0	0.0	74.1	74.1		0.0	0.0	0.0	1.1	1.1	
	GUATEMALA	0.0	0.0	2,189.4	2,189.4		0.0	0.0	0.0	32.9	32.9	
	HONG KONG	0.0	0.0	177.7	177.7		0.0	0.0	0.0	2.7	2.7	
	IRELAND	0.0	0.0	26.9	26.9		0.0	0.0	0.0	0.4	0.4	
	ITALY	0.0	0.0	11.8	11.8		0.0	0.0	0.0	0.2	0.2	
	JAPAN	0.0	0.0	89.2	89.2		0.0	0.0	0.0	1.3	1.3	
	KOREA RP	0.0	0.0	25.9	25.9		0.0	0.0	0.0	0.4	0.4	
	LUXEMBOURG	0.0	0.0	25.3	25.3		0.0	0.0	0.0	0.4	0.4	
	PHILIPPINES	0.0	0.0	3,022.3	3,022.3		0.0	0.0	0.0	45.4	45.4	
	SINGAPORE	4.1	0.0	100.2	104.3		0.1	0.0	0.0	1.5	1.6	
	SOUTH AFRICA	0.0	18.8	0.0	18.8		0.0	0.3	0.0	0.0	0.3	
	SPAIN	0.0	0.0	5.9	5.9		0.0	0.0	0.0	0.1	0.1	
	SWEDEN	0.0	0.0	0.9	0.9		0.0	0.0	0.0	0.0	0.0	
	SWITZERLAND	0.0	0.0	1.2	1.2		0.0	0.0	0.0	0.0	0.0	
	TAIWAN	0.0	0.0	22.2	22.2		0.0	0.0	0.0	0.3	0.3	
	U ARAB EMTS	894.7	5.2	243.4	1,143.2		13.4	0.1	0.1	3.7	17.2	
	U K	15,877.9	20.6	1,314.4	17,212.9		238.5	0.3	0.3	19.7	258.5	
	U S A	29,837.8	1,091.0	1,852.0	32,780.8		448.1	16.4	16.4	27.8	492.3	
	Management, administration and back office services Total	46,614.5	1,946.9	9,528.3	58,089.7		700.0	29.2	29.2	143.1	872.4	
	Licensing services											

Table A20: Distribution of Potential ICT-enabled Services rendered from Subsidiaries/Associates Abroad during 2017-18												
Service category	Value of Trade (in Million INR)						Value of Trade (in Million USD)					
	Country	Locally	To India	To Other Countries	Total		Locally	To India	To Other Countries	Total		
	FRANCE	0.0	49.3	0.0	49.3		0.0	0.7	0.0	0.7		
	IRELAND	0.0	0.0	165.8	165.8		0.0	0.0	2.5	2.5		
	U K	161.5	0.0	552.7	714.2		2.4	0.0	8.3	10.7		
	U S A	1,118.2	0.0	0.0	1,118.2		16.8	0.0	0.0	16.8		
	Licensing services Total	1,279.7	49.3	718.5	2,047.5		19.2	0.7	10.8	30.7		
	Engineering, related technical services and R&D											
	AUSTRALIA	1.3	0.0	0.0	1.3		0.0	0.0	0.0	0.0		
	AUSTRIA	0.0	0.0	0.7	0.7		0.0	0.0	0.0	0.0		
	BAHAMAS	0.0	0.0	18.0	18.0		0.0	0.0	0.3	0.3		
	BANGLADESH	12.2	13.2	16.0	41.3		0.2	0.2	0.2	0.6		
	BELIZE	29.7	0.0	0.0	29.7		0.4	0.0	0.0	0.4		
	BRAZIL	44.3	0.0	0.0	44.3		0.7	0.0	0.0	0.7		
	CANADA	378.0	0.0	2.9	380.9		5.7	0.0	0.0	5.7		
	CHINA P RP	1,544.3	29.9	63.6	1,637.9		23.2	0.4	1.0	24.6		
	DENMARK	0.0	0.0	4.9	4.9		0.0	0.0	0.1	0.1		
	FINLAND	0.0	65.5	0.0	65.5		0.0	1.0	0.0	1.0		
	FRANCE	203.7	21.0	312.1	536.8		3.1	0.3	4.7	8.1		
	GERMANY	3,923.4	0.0	533.0	4,456.4		58.9	0.0	8.0	66.9		
	HONG KONG	0.0	7.1	0.0	7.1		0.0	0.1	0.0	0.1		
	INDONESIA	0.0	0.0	289.4	289.4		0.0	0.0	4.3	4.3		
	ITALY	0.5	0.0	0.0	0.5		0.0	0.0	0.0	0.0		
	JAPAN	69.5	26.7	43.3	139.4		1.0	0.4	0.6	2.1		
	KENYA	47.5	0.0	0.0	47.5		0.7	0.0	0.0	0.7		
	KOREA RP	37.3	3.9	2.6	43.8		0.6	0.1	0.0	0.7		
	MALAYSIA	17.8	0.0	2.0	19.9		0.3	0.0	0.0	0.3		
	MEXICO	200.5	0.0	6.2	206.8		3.0	0.0	0.1	3.1		
	NEPAL	251.1	0.0	0.0	251.1		3.8	0.0	0.0	3.8		

Table A20: Distribution of Potential ICT-enabled Services rendered from Subsidiaries/Associates Abroad during 2017-18											
Service category	Value of Trade (in Million INR)						Value of Trade (in Million USD)				
	Country	Locally	To India	To Other Countries	Total		Locally	To India	To Other Countries	Total	
	NETHERLAND	226.2	0.0	1,350.5	1,576.6		3.4	0.0	20.3	23.7	
	NORWAY	0.0	0.0	59.6	59.6		0.0	0.0	0.9	0.9	
	OMAN	26,863.3	0.0	0.0	26,863.3		403.4	0.0	0.0	403.4	
	PHILIPPINES	8.4	0.0	0.0	8.4		0.1	0.0	0.0	0.1	
	ROMANIA	0.1	1.0	662.8	663.9		0.0	0.0	10.0	10.0	
	SAUDI ARAB	19,026.2	0.0	0.0	19,026.2		285.7	0.0	0.0	285.7	
	SINGAPORE	940.6	2,605.8	6,292.7	9,839.2		14.1	39.1	94.5	147.8	
	SWEDEN	1,360.1	0.0	6.6	1,366.6		20.4	0.0	0.1	20.5	
	TAIWAN	6.4	0.0	0.0	6.4		0.1	0.0	0.0	0.1	
	THAILAND	125.4	9.5	79.4	214.2		1.9	0.1	1.2	3.2	
	U ARAB EMTS	39,171.1	0.7	35,717.5	74,889.3		588.3	0.0	536.4	1,124.7	
	U K	10,672.1	253.1	8,200.2	19,125.4		160.3	3.8	123.1	287.2	
	U S A	27,614.1	336.6	4,945.3	32,895.9		414.7	5.1	74.3	494.0	
	Engineering, related technical services and R&D Total	1,32,774.7	3,373.9	58,609.3	1,94,757.9		1,994.0	50.7	880.2	2,924.8	
	Education and training services										
	BOTSWANA	9.6	0.0	0.0	9.6		0.1	0.0	0.0	0.1	
	ETHIOPIA	89.5	0.0	0.0	89.5		1.3	0.0	0.0	1.3	
	KENYA	103.4	0.0	0.0	103.4		1.6	0.0	0.0	1.6	
	OMAN	90.7	0.0	0.0	90.7		1.4	0.0	0.0	1.4	
	TAIWAN	0.0	4.4	0.0	4.4		0.0	0.1	0.0	0.1	
	TANZANIA REP	143.8	0.0	0.0	143.8		2.2	0.0	0.0	2.2	
	UGANDA	133.3	0.0	0.0	133.3		2.0	0.0	0.0	2.0	
	Education and training services Total	570.3	4.4	0.0	574.7		8.6	0.1	0.0	8.6	
	Grand Total	15,35,318.2	1,20,146.2	4,84,729.9	21,40,193.6		23,057.1	1,804.3	7,279.6	32,140.9	

ANNEXURE II

QUESTIONNAIRE





Government of India
Ministry of Commerce & Industry
Directorate General of Commercial Intelligence & Statistics
565, Anandapur, Ward No. 108, Sector – 1
Plot No. – 22, ECADP, Kolkata – 700107
<http://www.dgciskol.gov.in>



CONFIDENTIAL
FORM ICT01

EXPORTS OF ICT - ENABLED SERVICES– 2017-18

This NOTICE is being served under the Collection of Statistics Act, 2008, which makes your submission legally binding and mandatory. This form collects information that will be used in compiling disaggregate level trade statistics on exports of services delivered remotely over ICT networks (so-called ICT-enabled services).

The Collection of Statistics Act, 2008 guarantees the confidentiality of the information provided via this form. All information provided will be treated as confidential and individual level information will not be made available in the public domain.

Please submit the completed form within one month from the date of receipt of the notice. You may also download an MS Excel file of the format from the website of DGCIS, www.dgciskol.gov.in.

Some of the data requested may not be readily available from your records. In these cases, careful estimates will suffice.

A 'NIL' form is required if your firm was not in operation during 2017-18. Please state the effective date your company ceased operations.

After you complete this form, please retain a copy for your records. Please submit the completed form to the following address:

Director (Services Statistics Division), DGCIS, 565 Anandapur, Kolkata – 700107

or email: dirservices.dgcis@nic.in, d.mandal.dgcis@gov.in, admin@gcis.dgcis.gov.in.

For more information or assistance, please contact the officers-in-charge at Services Statistics Division of DGCIS:

Telephone : 033-24434050

E-mail : a.saha.dgcis@nic.in, dirservices.dgcis@nic.in

Reporting Period

Data reported in this form should relate to the financial year ending March 2018 (1st April 2017 to 31st March 2018). However, if the period is different from the financial year, please state your reporting period and report data according to this period. The reporting period should cover at least 50% of the reference financial year.

From

M	M	Y	Y	Y	Y
---	---	---	---	---	---

To

M	M	Y	Y	Y	Y
---	---	---	---	---	---

Value figures in this return should be reported in Indian Rupee (INR) only.

EXPLANATORY NOTES

Residents and Non-residents: A non-resident is any individual, enterprise, or other organization ordinarily domiciled in an economy other than India.

Subsidiaries of non-resident enterprises in India are **residents** of India. Similarly, foreign subsidiaries of Indian enterprises are non-residents.

Conversion to Indian Rupee: Foreign currencies should be converted to Indian Rupee (INR) using average exchange rate(s) for the period of reference.

Affiliate means a business enterprise located in one country that is directly or indirectly owned or controlled by a person of another country.

- (i) *Foreign affiliate* means an affiliate located outside the Indian territory in which an Indian person has direct investment.
- (ii) *Indian affiliate* means an affiliate located in India in which a foreign person has direct investment.
- (iii) *Foreign affiliate of a foreign parent* means, with reference to an Indian affiliate, any member of the affiliated foreign group owning the Indian affiliate that is not foreign parent of the Indian affiliate.

Principal activity of the enterprise refers to the primary area of work in which the enterprise has been engaged in the financial year 2017-18, i.e., April 2017 to March 2018. If an enterprise pursued more than one activity during the reference period, the activity that generated maximum turnover should be regarded as the principal activity and accordingly, appropriate code from Annexure-I is required to be assigned.

Modes of Delivery of Services: Information on the following modes of delivery of services is to be reported in this form:

- i. **Delivery of services to foreign entities/persons from office in India over internet, telephone or other**

ICT networks (Mode 1, or cross-border supply), takes place when the service is remotely supplied to a customer abroad. This is similar to trade in goods where the product is delivered across international borders and the consumer and the supplier remain in their respective countries. For example, a law firm may deliver legal advice by phone to a foreign enterprise or individual, a physician may provide a medical diagnosis to a patient via e-mail or a financial services supplier may supply portfolio management or brokerage services across an international border via the internet.

- ii. **Delivery of services to foreign entities/persons, temporarily in India (Mode 2, or consumption abroad),** takes place when the service is provided to a non-resident customer travelling to India. This also applies to services performed on the property of a non-resident customer. Tourist activities such as in-person visits to museums and theatres and travel abroad to receive medical treatment or attend language courses are typical examples. Services such as ship repair or aircraft refurbishment abroad, where only the property of the customer moves, or is situated abroad, are also covered.

- iii. **Delivery of services to foreign entities/persons by setting up subsidiaries or branches abroad (Mode 3, or commercial presence),** takes place when the service provider establishes (or acquires) an affiliate, branch or representative office in an overseas country to render services to a non-resident customer. For example, Indian bank setting up a subsidiary in a foreign country in order to supply banking services, Indian IT companies establishing branches/subsidiaries abroad to provide services to foreign customers etc.

- iv. **Delivery through on-site by deputing employees abroad (Mode 4, or presence of natural persons),** takes place when an employee of an enterprise temporarily travels abroad to provide services to non-resident customers.

A. Identification of the Service Provider

ORGANIZATION PARTICULARS			
01	Name		
02	Address of Corporate HQ/ Admin Office	Telephone	Fax
		Mobile	Email
		Website	
03	State		
04	City		
05	Year of Establishment		
RESPONDENT DETAILS			
06	Name		
07	Address (if other than HQ/Admin Office)		
08	Designation		
09	Telephone Number(s)		
10	Mobile Number		
11	Email		
12	Signature		

B. General Information

1. Was your enterprise controlled by another enterprise as on 31 March 2018?

[An enterprise is controlled when a different unit owns directly or indirectly, more than 50 per cent of the equity or shareholders' voting rights.]

YES please go to question 2

NO please go to question 3

2. What was the location of the controlling unit of your enterprise as on 31 March 2018?

Name of country: _____

3. Number of states in India in which your company had operational(s) during 2017-18 : _____

4. During 2017-18 did you have subsidiary(ies)/associate(s) or any other commercial presence in an overseas country?

YES please go to question 5

NO please go to question 6

5. Number of subsidiary(ies)/associate(s) that were in operation in 2017-18: _____

Please report details on subsidiary(ies)/associate(s) for each service category in Part E.

6.

[An] Number of persons employed in your enterprise as on 31 March 2018

Total : _____

Offshore : _____

Onsite : _____

[An employee is a person who works for an employer on the basis of a contract of employment and receives compensation in the form of wages, salaries, fees, gratuities, piecework pay or remuneration in kind. Part-time workers, seasonal workers, persons on strike or on short-term leave are all considered employees, while volunteers or workers on long-term leave are excluded.]

7. Proportion of persons employed by your enterprise as on 31 March 2018

Male (%) :

Female (%) :

8. Total value of turnover of your enterprise during 2017 – 18

[This includes only turnover of your enterprise for the period 1 April 2017 to 31 March 2018; do not include affiliates or other group-related enterprises.

Turnover comprises the totals invoiced by the enterprise during the reference period; this corresponds to market sales of goods or services supplied to third parties; include all duties and taxes on the goods or services invoiced by the unit with the exception of goods and services tax invoiced by the unit to its customer and other similar deductible taxes directly linked to turnover; include all other charges (transport, packaging, etc.) passed on to the customer. Price reductions, rebates and discounts as well as the value of returned packing must be deducted. Exclude income classified as other operating income, financial income and extraordinary income in company accounts; as well as any operating subsidies received from public authorities.]

Total Turnover	from services sold (in INR)	
	other than services (in INR)	

9. Total value of exports of services of your enterprise during 2017 – 18? _____

[This includes only exports of your enterprise, i.e., sales of services from India to an entity in another country for the period 1 April 2017 to 31 March 2018; do not include exports of affiliates or of other group-related enterprises.]

Total exports of services (in INR)	
Of which intra group trade (in INR)	

10. What was the principal activity of the enterprise as on 31 March 2018?

[Please refer to Annexure-I for applicable activity code of your enterprise]

11. During 2017 – 18 did your enterprise deliver services through any of its employees, temporarily working abroad?

Yes

No

Do Not Know ?

12. During 2017 – 18 did your enterprise deliver services to overseas customers, temporarily present in India?

Yes

No

Do Not Know ?

C. Services exports to be included

To help you identify which parts of the form relate to your business, please complete the following table. Use the lists of the 9 main service types covered in Annexure-III to this form.

Has your enterprise exported services belonging to the following broad categories during 2017-18?

Export of services is defined as the provision of services by your enterprise to a non-resident unit. Please report sales through a foreign subsidiary of your enterprise domiciled abroad (mode 3 transactions) separately in Part E for each service category.

Category of service	Yes / No	If yes, please complete the corresponding section of this form as indicated below
Telecommunications		D.1, E.1, Page 9
Computer services (including computer software)		D.2, E.2, Page 11
Sales and marketing services, not including trade and leasing services		D.3, E.3, Page 13
Information services		
(includes among others telemedicine/health services, as well as audiovisual services, on-line content and recordings of live performance)		D.4, E.4, Page 15
Financial services		D.5, E.5, Page 17
Management, administration and back office services		
(includes among others online reservation services for accommodation, online staffing services, telephone call centre services and other telephone-based support services)		D.6, E.6, Page 19
Licensing services		D.7, E.7, Page 21
Engineering, related technical services and R&D		D.8, E.8, Page 23
Education and training services		D.9, E.9, Page 25

Note:

In case of doubt about the content of these categories, please refer to the explanations given at the beginning of each corresponding section.

A. Details of services exports

D. 1. Exports of Telecommunications Services

Telecommunications services include: (i) Telephony and other telecommunications services; (ii) Internet telecommunications services; (iii) Broadcasting services.

Telecommunications services			
Total Value of Exports/Receipts (in INR)	% of Exports delivered		
	to foreign entities/persons from office in India over internet, telephone or other ICT networks [@]	to foreign entities/persons, temporarily in India [#]	through on-site services by deputing employees abroad ^{\$}
(1)	(2)	(3)	(4)

@: Include receipts from international telephone calls and any other telecommunications services delivered remotely across the border through ICT networks. Also include receipts from international roaming charges, international incoming call termination charges.

#: To cover services delivered in-person to a client travelling to meet the service supplier.

\$: Include on-site services delivered by employees travelling to clients' offices.

Country-wise breakup of Telecommunications services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
01	Japan		
02	Singapore		
03	Hong Kong		
04	Other East Asian Countries*		
05	South Asia*		
06	United Arab Emirates		
07	Other West Asian Countries*		
08	France		
09	Germany		
10	Ireland		
11	Luxembourg		
12	Netherlands		
13	Spain		
14	Sweden		
15	Switzerland		
16	United Kingdom		
17	Other EU Countries*		
18	Other European Countries*		
19	United States		
20	Canada		
21	Latin America*		
22	Australia		
23	New Zealand		
24	Mauritius		
25	South Africa		

Country-wise breakup of Telecommunications services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
26	Other African Countries*		
27	Other Countries (specify)		
	All		

*see Annex.-IV for list of countries; **: Value of exports out of total exports reported in Col.(3) is to be recorded here.

E.1. Information on subsidiary(ies)/ associate(s) abroad: Telecommunications services exports (If you have any subsidiary/associate abroad during the FY 2017-18, please mention details below)					
Sl. No	Subsidiary(ies)/ Associate(s)			Value of Education and training services rendered (in INR)	
	Name	Country	% shareholding	(5)	(6)
(1)	(2)	(3)	(4)	(5)	(6)
(1)				locally	
				to India	
				to other Countries	
				Total	
(2)				locally	
				to India	
				to other Countries	
				Total	
(3)				locally	
				to India	
				to other Countries	
				Total	

Note: Please enclose separate sheet, in case you have more than three subsidiaries/associates abroad.

D. 2. Exports of Computer Services (including computer software)

Computer services (including computer software) include: (i) Licensing services for the right to use computer software ; (ii) Software downloads ; (iii) Software originals ; (iv) On-line games; (v) On-line software; (vi) IT consulting and support services; (vii) Hosting and information technology (IT) infrastructure provisioning services ; (viii) IT infrastructure and network management services ; (ix) Maintenance and repair services of computers and peripheral equipment ; (x) IT design and development services for applications ; (xi) Other education and training services n.e.c.

Computer services			
Total Value of Exports/Receipts (in INR)	% of Exports delivered		
	to foreign entities/persons from office in India over internet, telephone or other ICT networks [@]	to foreign entities/persons, temporarily in India [#]	through on-site services by deputed employees abroad ^{\$}
(1)	(2)	(3)	(4)

@: Include receipts from exports of software and IT support services delivered over the phone, e-mail, cloud-computing, online platforms or any other remote delivery through ICT networks.

#: To cover services delivered in-person to a client travelling to meet the service supplier.

\$: Include receipts from on-site services delivered by employees travelling to clients' offices.

Country-wise breakup of Computer services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
01	Japan		
02	Singapore		
03	Hong Kong		
04	Other East Asian Countries*		
05	South Asia*		
06	United Arab Emirates		
07	Other West Asian Countries*		
08	France		
09	Germany		
10	Ireland		
11	Luxembourg		
12	Netherlands		
13	Spain		
14	Sweden		
15	Switzerland		
16	United Kingdom		
17	Other EU Countries*		
18	Other European Countries*		
19	United States		
20	Canada		
21	Latin America*		
22	Australia		
23	New Zealand		
24	Mauritius		
25	South Africa		

Country-wise breakup of Computer services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
26	Other African Countries*		
27	Other Countries (specify)		
	All		

*see Annex.-IV for list of countries; **: Value of exports out of total exports reported in Col.(3) is to be recorded here.

E.2. Information on subsidiary(ies)/ associate(s) abroad: Computer services (If you have any subsidiary/associate abroad during the FY 2017-18, please mention details below)					
Sl. No	Subsidiary(ies)/ Associate(s)			Value of Education and training services rendered (in INR)	
	Name	Country	% shareholding	(5)	(6)
(1)	(2)	(3)	(4)	(5)	(6)
(1)				locally	
				to India	
				to other Countries	
				Total	
(2)				locally	
				to India	
				to other Countries	
				Total	
(3)				locally	
				to India	
				to other Countries	
				Total	

Note: Please enclose separate sheet, in case you have more than three subsidiaries/associates abroad.

D. 3. Exports of Sales and Marketing Services (not including trade and leasing services)

Sales and marketing services, not including trade and leasing services, include: (i) Advertising services and provision of advertising space or time; (ii) Market research and public opinion polling services; (iii) Advertising and related photography services; (iv) Convention and trade show assistance and organisation services.

Sales and marketing services			
Total Value of Exports/Receipts (in INR)	% of Exports delivered		
	to foreign entities/persons from office in India over internet, telephone or other ICT networks [@]	to foreign entities/persons, temporarily in India [#]	through on-site services by deputing employees abroad ^{\$}
(1)	(2)	(3)	(4)

@: Include receipts from exports of advertising services delivered over the phone, e-mail, cloud-computing, online platforms or any other remote delivery through ICT networks.

#: To cover services delivered in-person to a client travelling to meet the service supplier.

\$: Include receipts from on-site services delivered by employees travelling to clients' offices.

Country-wise breakup of Sales and marketing services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
01	Japan		
02	Singapore		
03	Hong Kong		
04	Other East Asian Countries*		
05	South Asia*		
06	United Arab Emirates		
07	Other West Asian Countries*		
08	France		
09	Germany		
10	Ireland		
11	Luxembourg		
12	Netherlands		
13	Spain		
14	Sweden		
15	Switzerland		
16	United Kingdom		
17	Other EU Countries*		
18	Other European Countries*		
19	United States		
20	Canada		
21	Latin America*		
22	Australia		
23	New Zealand		
24	Mauritius		
25	South Africa		

Country-wise breakup of Sales and marketing services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
26	Other African Countries*		
27	Other Countries (specify)		
	All		

*see Annex.-IV for list of countries; **: Value of exports out of total exports reported in Col.(3) is to be recorded here.

E.3. Information on subsidiary(ies)/ associate(s) abroad: Sales and marketing services (If you have any subsidiary/associate abroad during the FY 2017-18, please mention details below)					
Sl. No	Subsidiary(ies)/ Associate(s)			Value of Education and training services rendered (in INR)	
	Name	Country	% shareholding	(5)	(6)
(1)	(2)	(3)	(4)	(5)	(6)
(1)				locally	
				to India	
				to other Countries	
				Total	
(2)				locally	
				to India	
				to other Countries	
				Total	
(3)				locally	
				to India	
				to other Countries	
				Total	

Note: Please enclose separate sheet, in case you have more than three subsidiaries/associates abroad.

D. 4. Exports of Information Services

Information services include: (i) Audiovisual and related services; (ii) On-line audio content; (iii) On-line video content; (iv) Radio and television broadcast originals; (v) Home programme distribution services, basic programming package; (vi) Home programme distribution services, discretionary programming package; (vii) Home programme distribution services, pay per view; (viii) Radio and television channel programmes; (ix) On-line books; (x) Human health services; (xi) On-line gambling services; (xii) News agency services; (xiii) Library and archive services; (xiv) Original compilations of facts/information; (xv) On-line newspapers and originals; (xvi) On-line directories and mailing lists; (xvii) On-line adult content; (xviii) Web search portal content; (xix) Other on-line content n.e.c.; (xx) All other professional, technical and business services n.e.c.

Information services			
Total Value of Exports/Receipts (in INR)	% of Exports delivered		
	to foreign entities/persons from office in India over internet, telephone or other ICT networks@	to foreign entities/persons, temporarily in India#	through on-site services by deputing employees abroad\$
(1)	(2)	(3)	(4)

@: Include receipts from exports of content development delivered over the phone, e-mail, cloud-computing, online platforms or any other remote delivery through ICT networks.

#: To cover services delivered in-person to a client travelling to meet the service supplier.

\$: Include receipts from on-site services delivered by employees travelling to clients' offices.

Country-wise breakup of Information services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
01	Japan		
02	Singapore		
03	Hong Kong		
04	Other East Asian Countries*		
05	South Asia*		
06	United Arab Emirates		
07	Other West Asian Countries*		
08	France		
09	Germany		
10	Ireland		
11	Luxembourg		
12	Netherlands		
13	Spain		
14	Sweden		
15	Switzerland		
16	United Kingdom		
17	Other EU Countries*		
18	Other European Countries*		
19	United States		
20	Canada		
21	Latin America*		
22	Australia		
23	New Zealand		
24	Mauritius		
25	South Africa		

Country-wise breakup of Information services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
26	Other African Countries*		
27	Other Countries (specify)		
	All		

*see Annex.-IV for list of countries; **: Value of exports out of total exports reported in Col.(3) is to be recorded here.

E.4. Information on subsidiary(ies)/ associate(s) abroad: Information services (If you have any subsidiary/associate abroad during the FY 2017-18, please mention details below)					
Sl. No	Subsidiary(ies)/ Associate(s)			Value of Education and training services rendered (in INR)	
	Name	Country	% shareholding	(5)	(6)
(1)	(2)	(3)	(4)	(5)	(6)
(1)				locally	
				to India	
				to other Countries	
				Total	
(2)				locally	
				to India	
				to other Countries	
				Total	
(3)				locally	
				to India	
				to other Countries	
				Total	

Note: Please enclose separate sheet, in case you have more than three subsidiaries/associates abroad.

D. 5. Exports of Financial Services

Financial services include: (i) Investment banking services; (ii) Services auxiliary to financial services other than to insurance and pensions; (iii) Services of holding financial assets; (iv) Other financial services, except investment banking, insurance services and pension services; (v) Central Banking services; (vi) Deposit services; (vii) Credit-granting services; (viii) Financial leasing services; (ix) Pension fund management services; (x) Individual pension services; (xi) Group pension services.

Financial services			
Total Value of Exports/Receipts (in INR)	% of Exports delivered		
	to foreign entities/persons from office in India over internet, telephone or other ICT networks [@]	to foreign entities/persons, temporarily in India [#]	through on-site services by deputing employees abroad ^{\$}
(1)	(2)	(3)	(4)

@: Include receipts from exports of financial services delivered over the phone, e-mail, cloud-computing or any other remote delivery through ICT networks.

#: To cover services delivered in-person to a client travelling to meet the service supplier.

\$: Include receipts from on-site services delivered by employees travelling to clients' offices.

Country-wise breakup of Financial services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks ^{**}
(1)	(2)	(3)	(4)
01	Japan		
02	Singapore		
03	Hong Kong		
04	Other East Asian Countries*		
05	South Asia*		
06	United Arab Emirates		
07	Other West Asian Countries*		
08	France		
09	Germany		
10	Ireland		
11	Luxembourg		
12	Netherlands		
13	Spain		
14	Sweden		
15	Switzerland		
16	United Kingdom		
17	Other EU Countries*		
18	Other European Countries*		
19	United States		
20	Canada		
21	Latin America*		
22	Australia		
23	New Zealand		
24	Mauritius		
25	South Africa		

Country-wise breakup of Financial services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
26	Other African Countries*		
27	Other Countries (specify)		
	All		

*see Annex.-IV for list of countries; **: Value of exports out of total exports reported in Col.(3) is to be recorded here.

E.5. Information on subsidiary(ies)/ associate(s) abroad: Financial services (If you have any subsidiary/associate abroad during the FY 2017-18, please mention details below)					
Sl. No	Subsidiary(ies)/ Associate(s)			Value of Education and training services rendered (in INR)	
	Name	Country	% shareholding	(5)	(6)
(1)	(2)	(3)	(4)	(5)	(6)
(1)				locally	
				to India	
				to other Countries	
				Total	
(2)				locally	
				to India	
				to other Countries	
				Total	
(3)				locally	
				to India	
				to other Countries	
				Total	

Note: Please enclose separate sheet, in case you have more than three subsidiaries/associates abroad.

D. 6. Exports of Management, Administration and Back Office Services

Management, administration and back office services include: (i) Legal services; (ii) Accounting, auditing and bookkeeping services; (iii) Tax consultancy and preparation services; (iv) Insolvency and receivership services; (v) Management consulting and management services; (vi) Business consulting services; (vii) Other management services, except construction project management services; (viii) Employment services; (ix) Investigation and security services; (x) Travel arrangements, tour operator and related services; (xi) Credit reporting services; (xii) Collection agency services; (xiii) Telephone-based support services; (xiv) Combined office administrative services; (xv) Specialized office support services; (xvi) Other information and support services n.e.c.

Management, administration and back office services			
Total Value of Exports/Receipts (in INR)	% of Exports delivered		
	to foreign entities/persons from office in India over internet, telephone or other ICT networks [@]	to foreign entities/persons, temporarily in India [#]	through on-site services by deputing employees abroad ^{\$}
(1)	(2)	(3)	(4)

@: Include receipts from exports of financial services delivered over the phone, e-mail, cloud-computing or any other remote delivery through ICT networks.

#: To cover services delivered in-person to a client travelling to meet the service supplier.

\$: Include receipts from on-site services delivered by employees travelling to clients' offices.

Country-wise breakup of Management, administration and back office services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks ^{**}
(1)	(2)	(3)	(4)
01	Japan		
02	Singapore		
03	Hong Kong		
04	Other East Asian Countries*		
05	South Asia*		
06	United Arab Emirates		
07	Other West Asian Countries*		
08	France		
09	Germany		
10	Ireland		
11	Luxembourg		
12	Netherlands		
13	Spain		
14	Sweden		
15	Switzerland		
16	United Kingdom		
17	Other EU Countries*		
18	Other European Countries*		
19	United States		
20	Canada		
21	Latin America*		
22	Australia		
23	New Zealand		
24	Mauritius		
25	South Africa		

Country-wise breakup of Management, administration and back office services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
26	Other African Countries*		
27	Other Countries (specify)		
	All		

*see Annex.-IV for list of countries; **: Value of exports out of total exports reported in Col.(3) is to be recorded here.

E.6. Information on subsidiary(ies)/ associate(s) abroad: Management, administration and back office services

(If you have any subsidiary/associate abroad during the FY 2017-18, please mention details below)

Sl. No	Subsidiary(ies)/ Associate(s)			Value of Education and training services rendered (in INR)	
	Name	Country	% shareholding	(5)	(6)
(1)	(2)	(3)	(4)	(5)	(6)
(1)				locally	
				to India	
				to other Countries	
				Total	
(2)				locally	
				to India	
				to other Countries	
				Total	
(3)				locally	
				to India	
				to other Countries	
				Total	

Note: Please enclose separate sheet, in case you have more than three subsidiaries/associates abroad.

D. 7. Exports of Licensing Services

Licensing services include: (i) Licensing services for the right to use trademarks and franchises; (ii) Licensing services for the right to use R&D products; (iii) Licensing services for the right to use entertainment, literary or artistic originals; (iv) Licensing services for the right to use mineral exploration and evaluation; (v) Licensing services for the right to use other intellectual property products; (vi) Licensing services for the right to use databases.

Licensing services			
Total Value of Exports/Receipts (in INR)	% of Exports delivered		
	to foreign entities/persons from office in India over internet, telephone or other ICT networks [@]	to foreign entities/persons, temporarily in India [#]	through on-site services by deputing employees abroad ^{\$}
(1)	(2)	(3)	(4)

@: Include receipts from exports of financial services delivered over the phone, e-mail, cloud-computing or any other remote delivery through ICT networks.

#: To cover services delivered in-person to a client travelling to meet the service supplier.

\$: Include receipts from on-site services delivered by employees travelling to clients' offices.

Country-wise breakup of Licensing services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks ^{**}
(1)	(2)	(3)	(4)
01	Japan		
02	Singapore		
03	Hong Kong		
04	Other East Asian Countries*		
05	South Asia*		
06	United Arab Emirates		
07	Other West Asian Countries*		
08	France		
09	Germany		
10	Ireland		
11	Luxembourg		
12	Netherlands		
13	Spain		
14	Sweden		
15	Switzerland		
16	United Kingdom		
17	Other EU Countries*		
18	Other European Countries*		
19	United States		
20	Canada		
21	Latin America*		
22	Australia		
23	New Zealand		
24	Mauritius		
25	South Africa		

Country-wise breakup of Licensing services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
26	Other African Countries*		
27	Other Countries (specify)		
	All		

*see Annex.-IV for list of countries; **: Value of exports out of total exports reported in Col.(3) is to be recorded here.

E.7. Information on subsidiary(ies)/ associate(s) abroad: Licensing services (If you have any subsidiary/associate abroad during the FY 2017-18, please mention details below)					
Sl. No	Subsidiary(ies)/ Associate(s)			Value of Education and training services rendered (in INR)	
	Name	Country	% shareholding	(5)	(6)
(1)	(2)	(3)	(4)	(5)	(6)
(1)				locally	
				to India	
				to other Countries	
				Total	
(2)				locally	
				to India	
				to other Countries	
				Total	
(3)				locally	
				to India	
				to other Countries	
				Total	

Note: Please enclose separate sheet, in case you have more than three subsidiaries/associates abroad.

D. 8. Exports of Engineering, related Technical Services and R&D

Engineering, related technical services and R&D include: (i) Research and experimental development services in natural sciences and engineering; (ii) Research and experimental development services in social sciences and humanities; (iii) Interdisciplinary research and experimental development services; (iv) Industrial design services; (v) Research and development originals; (vi) Design originals; (vii) Technical testing and analysis services; (viii) Architectural services, urban and land planning and landscape architectural services; (ix) Engineering services; (x) Surface surveying and map-making services; (xi) Weather forecasting and meteorological services; (xii) Scientific and technical consulting services n.e.c.; (xiii) Publishing, printing and reproduction services; (xiv) Photographic processing services; (xv) Translation and interpretation services; (xvi) Restoration and retouching services of photography; (xvii) Other photography services; (xviii) Interior design services; (xix) Other specialty design services; (xx) Drafting services, n.e.c.

Engineering, related technical services and R&D			
Total Value of Exports/Receipts (in INR)	% of Exports delivered		
	to foreign entities/persons from office in India over internet, telephone or other ICT networks [@]	to foreign entities/persons, temporarily in India [#]	through on-site services by deputing employees abroad ^{\$}
(1)	(2)	(3)	(4)

@: Include receipts from exports of financial services delivered over the phone, e-mail, cloud-computing or any other remote delivery through ICT networks.

#: To cover services delivered in-person to a client travelling to meet the service supplier.

\$: Include receipts from on-site services delivered by employees travelling to clients' offices.

Country-wise breakup of Engineering, related technical services and R&D services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks ^{**}
(1)	(2)	(3)	(4)
01	Japan		
02	Singapore		
03	Hong Kong		
04	Other East Asian Countries*		
05	South Asia*		
06	United Arab Emirates		
07	Other West Asian Countries*		
08	France		
09	Germany		
10	Ireland		
11	Luxembourg		
12	Netherlands		
13	Spain		
14	Sweden		
15	Switzerland		
16	United Kingdom		
17	Other EU Countries*		
18	Other European Countries*		
19	United States		
20	Canada		
21	Latin America*		

Country-wise breakup of Engineering, related technical services and R&D services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
22	Australia		
23	New Zealand		
24	Mauritius		
25	South Africa		
26	Other African Countries*		
27	Other Countries (specify)		
	All		

*see Annex.-IV for list of countries; **: Value of exports out of total exports reported in Col.(3) is to be recorded here.

E.8. Information on subsidiary(ies)/ associate(s) abroad: Engineering, related technical services and R&D (If you have any subsidiary/associate abroad during the FY 2017-18, please mention details below)					
Sl. No	Subsidiary(ies)/ Associate(s)			Value of Education and training services rendered (in INR)	
	Name	Country	% shareholding	(5)	(6)
(1)	(2)	(3)	(4)	(5)	(6)
(1)				locally	
				to India	
				to other Countries	
				Total	
(2)				locally	
				to India	
				to other Countries	
				Total	
(3)				locally	
				to India	
				to other Countries	
				Total	

Note: Please enclose separate sheet, in case you have more than three subsidiaries/associates abroad.

D. 9. Exports of Education and Training Services

Education and training services include: (i) Pre-primary education services; (ii) Primary education services; (iii) Secondary education services; (iv) Post-secondary non-tertiary education services; (v) Tertiary education services; (vi) Educational support services; (vii) Cultural education services; (viii) Sports and recreation education services; (ix) Other education and training services, n.e.c.

Education and training services			
Total Value of Exports/Receipts (in INR)	% of Exports delivered		
	to foreign entities/persons from office in India over internet, telephone or other ICT networks [@]	to foreign entities/persons, temporarily in India [#]	through on-site services by deputing employees abroad ^{\$}
(1)	(2)	(3)	(4)

@: Include receipts from exports of financial services delivered over the phone, e-mail, cloud-computing or any other remote delivery through ICT networks.

#: To cover services delivered in-person to a client travelling to meet the service supplier.

\$: Include receipts from on-site services delivered by employees travelling to clients' offices.

Country-wise breakup of Education and training services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
01	Japan		
02	Singapore		
03	Hong Kong		
04	Other East Asian Countries*		
05	South Asia*		
06	United Arab Emirates		
07	Other West Asian Countries*		
08	France		
09	Germany		
10	Ireland		
11	Luxembourg		
12	Netherlands		
13	Spain		
14	Sweden		
15	Switzerland		
16	United Kingdom		
17	Other EU Countries*		
18	Other European Countries*		
19	United States		
20	Canada		
21	Latin America*		
22	Australia		
23	New Zealand		
24	Mauritius		
25	South Africa		

Country-wise breakup of Education and training services exports			
Sl. No.	Country/Region	Value of total exports (in INR)	Value of exports delivered from office in India over ICT networks**
(1)	(2)	(3)	(4)
26	Other African Countries*		
27	Other Countries (specify)		
	All		

*see Annex.-IV for list of countries; **: Value of exports out of total exports reported in Col.(3) is to be recorded here.

E. 9. Information on subsidiary(ies)/ associate(s) abroad: Education and training services (If you have any subsidiary/associate abroad during the FY 2017-18, please mention details below)					
Sl. No	Subsidiary(ies)/ Associate(s)			Value of Education and training services rendered (in INR)	
	Name	Country	% shareholding	(5)	(6)
(1)	(2)	(3)	(4)	(5)	(6)
(1)				locally	
				to India	
				to other Countries	
				Total	
(2)				locally	
				to India	
				to other Countries	
				Total	
(3)				locally	
				to India	
				to other Countries	
				Total	

Note: Please enclose separate sheet, in case you have more than three subsidiaries/associates abroad.

F. Break-up of Exports of ICT-enabled by sub-categories		
Sl. No.	Category of service	Value of exports (in INR)
1.	Computer Services	
1.1	Computer software (<i>includes (i) Software downloads, (ii) Software originals, (iii) On-line games and (iv) On-line software</i>)	
1.2	IT consulting and support services	
1.3	IT design and development services for applications	
1.4	Other computer services	
2.	Sales and marketing services, not including trade and leasing services	
2.1	Advertising services	
2.2	Market research and public opinion polling services	
2.3	Other sales and marketing services	
3.	Information services	
3.1	Audiovisual services (<i>includes (i) Audiovisual and related services; (ii) On-line audio content; (iii) On-line video content; (iv) Radio and television broadcast originals; (v) Home programme distribution services, basic programming package; (vi) Home programme distribution services, discretionary programming package; (vii) Home programme distribution services, pay per view; (viii) Radio and television channel programmes</i>)	
3.2	Other information services	
4.	Management, administration and back office services	
4.1	Legal services	
4.2	Accounting; auditing; bookkeeping; and tax consulting services (<i>includes (i) Accounting, auditing and bookkeeping services; (ii) Tax consultancy and preparation services; (iii) Insolvency and receivership services</i>)	
4.3	Business and management consulting and public relations services (<i>includes (i) Management consulting and management services; (ii) Business consulting services; (iii) Other management services, except construction project management services</i>)	
4.4	Other business services	
5.	Engineering, related technical services and R&D	
5.1	Research and development originals	
5.2	Architectural services	
5.3	Engineering services	
5.4	Scientific and other technical services (<i>includes (i) Surface surveying and map-making services; (ii) Weather forecasting and meteorological services; (iii) Technical testing and analysis services (iv) Scientific and technical consulting services n.e.c</i>)	
5.5	Other research & development and related technical services	

G. Break-up of Export of ICT-enabled services by State/UT		
Sl. No.	State/UT	Percentage share of Export earnings from ICT-enabled services
1.	Andaman and Nicobar Islands	
2.	Andhra Pradesh	
3.	Arunachal Pradesh	
4.	Assam	
5.	Bihar	
6.	Chandigarh	
7.	Chhattisgarh	
8.	Dadra & Nagar Haveli	
9.	Daman & Diu	
10.	Mizoram	
11.	NCT of Delhi	
12.	Goa	
13.	Gujarat	
14.	Haryana	
15.	Himachal Pradesh	
16.	Jammu & Kashmir	
17.	Jharkhand	
18.	Karnataka	
19.	Kerala	
20.	Lakshadweep	
21.	Madhya Pradesh	
22.	Maharashtra	
23.	Manipur	
24.	Meghalaya	
25.	Nagaland	
26.	Odisha	
27.	Puducherry	
28.	Punjab	
29.	Rajasthan	
30.	Sikkim	
31.	Tamil Nadu	
32.	Telangana	
33.	Tripura	
34.	Uttar Pradesh	
35.	Uttarakhand	
36.	West Bengal	

ANNEXURE III

*I*nternational Standard Industrial Classification of All Economic Activities, Rev.4



International Standard Industrial Classification of All Economic Activities, Rev.4

Code	Activity
01	Crop and animal production, hunting and related service activities
02	Forestry and logging
03	Fishing and aquaculture
05	Mining of coal and lignite
06	Extraction of crude petroleum and natural gas
07	Mining of metal ores
08	Other mining and quarrying
09	Mining support service activities
10	Manufacture of food products
11	Manufacture of beverages
12	Manufacture of tobacco products
13	Manufacture of textiles
14	Manufacture of wearing apparel
15	Manufacture of leather and related products
16	Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials
17	Manufacture of paper and paper products
18	Printing and reproduction of recorded media
19	Manufacture of coke and refined petroleum products
20	Manufacture of chemicals and chemical products
21	Manufacture of basic pharmaceutical products and pharmaceutical preparations
22	Manufacture of rubber and plastics products
23	Manufacture of other non-metallic mineral products
24	Manufacture of basic metals
25	Manufacture of fabricated metal products, except machinery and equipment
26	Manufacture of computer, electronic and optical products
27	Manufacture of electrical equipment
28	Manufacture of machinery and equipment n.e.c.
29	Manufacture of motor vehicles, trailers and semi-trailers
30	Manufacture of other transport equipment
31	Manufacture of furniture
32	Other manufacturing
33	Repair and installation of machinery and equipment
35	Electricity, gas, steam and air conditioning supply
36	Water collection, treatment and supply
37	Sewerage
38	Waste collection, treatment and disposal activities; materials recovery
39	Remediation activities and other waste management services
41	Construction of buildings
42	Civil engineering
43	Specialized construction activities
45	Wholesale and retail trade and repair of motor vehicles and motorcycles
46	Wholesale trade, except of motor vehicles and motorcycles
47	Retail trade, except of motor vehicles and motorcycles

- 49 Land transport and transport via pipelines
- 50 Water transport
- 51 Air transport
- 52 Warehousing and support activities for transportation
- 53 Postal and courier activities
- 55 Accommodation
- 56 Food and beverage service activities
- 58 Publishing activities
- 59 Motion picture, video and television programme production, sound recording and music publishing activities
- 60 Programming and broadcasting activities
- 61 Telecommunications
- 62 Computer programming, consultancy and related activities
- 63 Information service activities
- 64 Financial service activities, except insurance and pension funding
- 65 Insurance, reinsurance and pension funding, except compulsory social security
- 66 Activities auxiliary to financial service and insurance activities
- 68 Real estate activities
- 69 Legal and accounting activities
- 70 Activities of head offices; management consultancy activities
- 71 Architectural and engineering activities; technical testing and analysis
- 72 Scientific research and development
- 73 Advertising and market research
- 74 Other professional, scientific and technical activities
- 75 Veterinary activities
- 77 Rental and leasing activities
- 78 Employment activities
- 79 Travel agency, tour operator, reservation service and related activities
- 80 Security and investigation activities
- 81 Services to buildings and landscape activities
- 82 Office administrative, office support and other business support activities
- 84 Public administration and defence; compulsory social security
- 85 Education
- 86 Human health activities
- 87 Residential care activities
- 88 Social work activities without accommodation
- 90 Creative, arts and entertainment activities
- 91 Libraries, archives, museums and other cultural activities
- 92 Gambling and betting activities
- 93 Sports activities and amusement and recreation activities
- 94 Activities of membership organizations
- 95 Repair of computers and personal and household goods
- 96 Other personal service activities
- 97 Activities of households as employers of domestic personnel
- 98 Undifferentiated goods- and services-producing activities of private households for own use
- 99 Activities of extraterritorial organizations and bodies

ANNEXURE IV

COMPOSITION OF REGIONS



List of countries			
Region	Country	Region	Country
Other East Asian Countries	Brunei Darussalam	Other EU Countries	Austria
	Cambodia		Belgium
	China		Bulgaria
	Christmas Island		Croatia
	Cocos (Keeling) Islands		Cyprus
	Indonesia		Czech Republic
	Korea, Republic of		Denmark
	Lao People's Democratic Republic		Estonia
	Macao		Finland
	Malaysia		Greece
	Mongolia		Hungary
	Myanmar		Italy
	Philippines		Latvia
	Taiwan, Province of China		Lithuania
	Thailand		Malta
South Asia	Afghanistan	Poland	
	Bangladesh	Portugal	
	Bhutan	Romania	
	India	Slovakia	
	Iran, Islamic Republic of	Slovenia	
	Maldives	Aland Islands	
	Nepal	Albania	
	Pakistan	Andorra	
	Sri Lanka	Belarus	
	Other West Asian Countries	Azerbaijan	Bosnia and Herzegovina
Armenia		Channel Islands	
Bahrain		Falkland Islands (Malvinas)	
Georgia		Gibraltar	
Iraq		Guernsey	
Israel		Holy See (Vatican City State)	
Jordan		Iceland	
Kazakhstan		Isle of Man	
Kuwait		Jersey	
Kyrgyzstan		Liechtenstein	
Lebanon		Macedonia, The former Yugoslav Republic of	
Oman		Moldova, Republic of	
Palestine, State of		Monaco	
Qatar		Montenegro	
Saudi Arabia		Norway	
Syrian Arab Republic		Russian Federation	
Tajikistan		San Marino	
Turkey		Sark	
Turkmenistan		Serbia	
Uzbekistan		Svalbard and Jan Mayen	
Yemen	Ukraine		
		Other European Countries	

List of countries			
Region	Country	Region	Country
Latin America	Argentina	Other African Countries	Mozambique
	Belize		Réunion
	Bolivia		Rwanda
	Brazil		Seychelles
	Chile		Somalia
	Colombia		South Sudan
	Costa Rica		Uganda
	Ecuador		United Republic of Tanzania
	El Salvador		Zambia
	Faroe Islands		Zimbabwe
	French Guiana		Angola
	Guatemala		Cameroon
	Guyana		Central African Republic
	Honduras		Chad
	Mexico		Congo
	Nicaragua		Democratic Republic of the Congo
	Panama		Equatorial Guinea
	Paraguay		Gabon
	Peru		Sao Tome and Principe
	Suriname		Botswana
Uruguay	Eswatini		
Venezuela	Lesotho		
Other African Countries	Algeria		Namibia
	Egypt		Benin
	Libya		Burkina Faso
	Morocco		Cabo Verde
	Sudan		Côte d'Ivoire
	Tunisia		Gambia
	Western Sahara		Ghana
	British Indian Ocean Territory		Guinea
	Burundi		Guinea-Bissau
	Comoros		Liberia
	Djibouti		Mali
	Eritrea		Mauritania
	Ethiopia		Niger
	French Southern Territories		Nigeria
	Kenya		Saint Helena
	Madagascar		Senegal
	Malawi		Sierra Leone
	Mayotte		Togo

ANNEXURE V

D

ETAILED COMPOSITION OF SERVICE CATEGORIES



EXPORTS OF INFORMATION AND COMMUNICATIONS TECHNOLOGY SERVICES – 2017-18

Detailed Composition of Services Categories

1.1. TELECOMMUNICATIONS SERVICES

Telecommunication services include:

- Telephony and other telecommunications services (see 1.1.1.);
- Internet telecommunications services (see 1.1.2.);
- Broadcasting services (see 1.1.3.).

1.1.1. Telephony and other telecommunications services include:

- Carrier services;
- Fixed telephony services;
- Mobile voice services;
- Mobile text services;
- Mobile data services, except text services;
- Private network services;
- Data transmission services;
- Other telecommunications services

1.1.2. Internet telecommunications services include:

- Internet backbone services;
- Narrowband Internet access services;
- Broadband Internet access services;
- Other Internet telecommunications services.

1.1.3. Broadcasting services include:

- Selection, scheduling and broadcasting of television and radio programmes
- Combined programme production and broadcasting services

1.2. COMPUTER SERVICES (INCLUDING COMPUTER SOFTWARE)

Computer services (including computer software) include:

- Licensing services for the right to use computer software (see 1.2.1.);
- Software downloads (see 1.2.2.);
- Software originals (see 1.2.3.);
- On-line games (see 1.2.4.);
- On-line software (see 1.2.5.);
- IT consulting and support services (see 1.2.6.);
- Hosting and information technology (IT) infrastructure provisioning services (see 1.2.7.);
- IT infrastructure and network management services (see 1.2.8.);
- Maintenance and repair services of computers and peripheral equipment (see 1.2.9.);
- IT design and development services for applications (see 1.2.10.);

- Specially tailored computer training services provided to an individual or a group (see 1.2.11.).

1.2.1. Licensing services for the right to use computer software include:

- Licensing services for the right to reproduce, distribute or incorporate computer programs, program descriptions and supporting materials for both systems and applications software. This applies to various levels of licensing rights:
 - rights to reproduce and distribute the software
 - rights to use software components for the creation of and inclusion in other software products.

1.2.2. Software downloads include:

- System software downloads;
- Application software downloads.

1.2.3. Software originals include:

- Software originals (i.e. a set of instructions that is to be used in a computing device in order to bring about a specific result), which can be protected and licensed as intellectual property.

1.2.4. On-line games include:

- Games that are intended to be played on the Internet such as:
 - role-playing games (RPGs)
 - strategy games
 - action games
 - card games
 - children's games.

1.2.5. On-line software include:

- Software that is intended to be executed on-line, except game software.

1.2.6. IT consulting and support services include:

- IT consulting services;
- IT support services.

1.2.7. Hosting and information technology (IT) infrastructure provisioning services include:

- Website hosting services;
- Application service provisioning;
- Other hosting and IT infrastructure provisioning services.

1.2.8. IT infrastructure and network management services include:

- Network management services;
- Computer systems management services.

1.2.9. Maintenance and repair services of computers and peripheral equipment include:

- Maintenance and repair services of computers and computing machinery and peripheral equipment, such as:

- desktop computers
- laptop computers
- hand-held computers (PDA's)
- dedicated computer terminals
- computer servers
- magnetic disk drives, flash drives and other storage devices
- optical disk drives (CD-RW, CD-ROM, DVD-ROM, DVD-RW)
- printers
- monitors
- keyboards
- internal and external computer modems
- scanners, including bar code scanners
- smart card readers
- virtual reality helmets
- computer projectors
- computer terminals like automatic teller machines (ATM's); point-of-sale (POS) terminals, not mechanically operated.

1.2.10. IT design and development services for applications include:

- Services of designing the structure and/or writing the computer code necessary to create and/or implement a software application, such as:

- designing the structure and content of a web page and/or writing the computer code necessary to create and implement a web page;
- designing the structure and content of a database and/or writing the computer code necessary to create and implement a database;
- designing the structure and writing the computer code necessary to design and develop a custom software application;
- customization and integration, adapting (modifying, configuring, etc.) and installing an existing application so that it is functional within the clients' information system environment.

1.2.11. Specially tailored computer training services provided to an individual or a group include:

- Specially tailored computer training services provided to an individual or a group, including training provided as part of a consultancy.

1.3. SALES AND MARKETING SERVICES, NOT INCLUDING TRADE AND LEASING SERVICES

Sales and marketing services, not including trade and leasing services, include:

- Advertising services and provision of advertising space or time (see 1.3.1.);
- Market research and public opinion polling services (see 1.3.2.);

- Advertising and related photography services (see 1.3.3.);
- Convention and trade show assistance and organisation services (see 1.3.4.).

1.3.1. Advertising services and provision of advertising space or time include:

- Full service advertising;
- Direct marketing and direct mail services;
- Other advertising services;
- Purchase or sale of advertising space or time, on commission;
- Sale of advertising space in print media (except on commission);
- Sale of TV/radio advertising time (except on commission);
- Sale of Internet advertising space (except on commission);
- Sale of other advertising space or time (except on commission).

1.3.2. Market research and public opinion polling services include:

- Market analysis, analysis of competition and the behaviour of consumers;
- Use of research monographs, statistics, econometric models, surveys, etc.;
- Investigation services designed to secure information on public opinions regarding social, economic, political and other issues.

1.3.3. Advertising and related photography services include:

- Services consisting of photographing:
 - merchandise, industrial products;
 - fashion clothes and other apparel;
 - machinery, buildings;
 - persons and other subjects for use in public relations.
- Photographic services for:
 - advertising displays, brochures, newspaper advertisements;
 - catalogues.

1.3.4. Convention and trade show assistance and organisation services include:

- Convention assistance and organization services;
- Trade show assistance and organization services.

1.4. INFORMATION SERVICES

Information services include:

- Audiovisual and related services (see 1.4.1.);
- On-line audio content (see 1.4.2.);
- On-line video content (see 1.4.3.);
- Radio and television broadcast originals (see 1.4.4.);
- Home programme distribution services, basic programming package (see 1.4.5.);
- Home programme distribution services, discretionary programming package (see 1.4.6.);
- Home programme distribution services, pay per view (see 1.4.7.);

- Radio and television channel programmes (see 1.4.8.);
- On-line books (see 1.4.9.);
- Human health services (see 1.4.10.);
- On-line gambling services (see 1.4.11.);
- News agency services (see 1.4.12.);
- Library and archive services (see 1.4.13.);
- Original compilations of facts/information (see 1.4.14.);
- On-line newspapers and originals (see 1.4.15.);
- On-line directories and mailing lists (see 1.4.16.);
- On-line adult content (see 1.4.17.);
- Web search portal content (see 1.4.18.);
- Other on-line content n.e.c. (see 1.4.19.);
- Compilation services of facts and information (i.e. databases), other than mailing lists (see 1.4.20.).

1.4.1. Audiovisual and related services include:

- Sound recording services, except live recording services;
- Live recording services;
- Sound recording originals.

1.4.2. On-line audio content include:

- Musical audio downloads;
- Streamed audio content.

1.4.3. On-line video content include:

- Films and other video downloads;
- Streamed video content.

1.4.4. Radio and television broadcast originals include:

- Radio broadcast originals;
- Television broadcast originals.

1.4.5. Home programme distribution services, basic programming package include:

- Providing subscriber access to a basic range of programming services generally for a monthly fee.

1.4.6. Home programme distribution services, discretionary programming package include:

- Providing subscriber programming services in addition to those included in the basic package for a fee separate from, and in addition to, the basic monthly fee.

1.4.7. Home programme distribution services, pay per view include:

- Providing subscribers the ability to view a specific programme (movie or event) from his home for a fee separate from, and in addition to, the monthly fee for basic or discretionary programming packages.

1.4.8. Radio and television channel programmes include:

- Radio channel programmes;
- Television channel programmes.

1.4.9. On-line books include:

- On-line books, including school textbooks, general reference books, such as atlases and other books of maps or charts, dictionaries and encyclopedias.

1.4.10. Human health services include:

- Surgical services for inpatients;
- Gynaecological and obstetrical services for inpatients;
- Psychiatric services for inpatients;
- Other services for inpatients;
- General medical services;
- Specialized medical services;
- Dental medical services;
- Childbirth and related services;
- Nursing services;
- Physiotherapeutic services;
- Ambulance services;
- Medical laboratory services;
- Diagnostic-imaging services;
- Blood, sperm and organ bank services;
- Other human health services n.e.c.

1.4.11. On-line gambling services include:

- On-line gambling services.

1.4.12. News agency services include:

- News agency services to newspapers and periodicals;
- News agency services to audiovisual media.

1.4.13. Library and archive services include:

- Library services;
- Archive services.

1.4.14. Original compilations of facts/information include:

- Original compilations of facts or information (i.e. databases) organized for retrieval and consultation, including mailing lists.

1.4.15. On-line newspapers and originals include:

- Publications issued on the Internet where the main content is updated at fixed intervals, usually on a daily, weekly or monthly basis; whether on subscription or single copy sales;
- Portions of newspapers such as headlines e-mailed daily or more frequently;
- Periodic newsletters.

1.4.16. On-line directories and mailing lists include:

- On-line directories and mailing lists, including telephone books;
- Other on-line collections of facts/information (databases).

1.4.17. On-line adult content include:

- Mature theme, sexually explicit content published or broadcast over the Internet including graphics, live feeds, interactive performances and virtual activities.

1.4.18. Web search portal content include:

- Content provided on web search portals, i.e. extensive databases of Internet addresses and content in an easily searchable format.

1.4.19. Other on-line content n.e.c. include:

- Statistics or other information, including streamed news;
- Other on-line content not included above such as greeting cards, jokes, cartoons, graphics, maps.

1.4.20. Compilation services of facts and information (i.e. databases), other than mailing lists include:

- Compilation services of facts and information (i.e. databases), other than mailing lists.

1.5. FINANCIAL SERVICES

Financial services include:

- Investment banking services (see 1.5.1.);
- Services auxiliary to financial services other than to insurance and pensions (see 1.5.2.);
- Services of holding financial assets (see 1.5.3.);
- Other financial services, except investment banking, insurance services and pension services (see 1.5.4.);
- Central Banking services (see 1.5.5.);
- Deposit services (see 1.5.6.);
- Credit-granting services (see 1.5.7.);
- Financial leasing services (see 1.5.8.);
- Pension fund management services (see 1.5.9.);
- Individual pension services (see 1.5.10.);
- Group pension services (see 1.5.11.).

1.5.1. Investment banking services include:

- Securities underwriting services;
- Guaranteeing the sale of an issue of securities at a stated price from the issuing corporation or government and reselling it to investors;
- Engaging to sell as much of an issue of securities as possible without making a guarantee to purchase the entire offering from the issuer.

1.5.2. Services auxiliary to financial services other than to insurance and pensions include:

- Mergers and acquisition services;
- Corporate finance and venture capital services;
- Other services related to investment banking;
- Securities brokerage services;
- Commodity brokerage services;
- Processing and clearing services of securities transactions;
- Portfolio management services except pension funds;
- Trust services;
- Custody services;
- Financial market operational services;
- Financial market regulatory services;

- Other financial market administration services;
- Financial consultancy services;
- Foreign exchange services;
- Financial transactions processing and clearinghouse services;
- Other services auxiliary to financial services n.e.c.

1.5.3. Services of holding financial assets include:

- Services of holding equity of subsidiary companies;
- Services of holding securities and other assets of trusts and funds and similar financial entities.

1.5.4. Other financial services, except investment banking, insurance services and pension services include:

- Factoring services.

1.5.5. Central Banking services include:

- Services which support the country's systems for clearing and settling payments and other financial transactions;
- Services of maintaining deposit accounts for major financial institutions and for the central

Government;

- Services of implementing monetary policy;
- Services of managing the government's foreign exchange reserves;
- Services of influencing the value of currency;
- Currency services under the authority of the central bank, including currency design and production, issuing, distribution and replacement;
- Fiscal agency services including advisory services to the government on matters relating to the public debt, issuing debt instruments, maintaining bondholder records and making interest and redemption payments on behalf of the government;
- Supervisory activities with regard to banks and/or non-banks if undertaken by the central bank;
- Other central banking services n.e.c.

1.5.6. Deposit services include:

- Deposit services to corporate and institutional depositors;
- Deposit services to other depositors.

1.5.7. Credit-granting services include:

- Residential mortgage loan services;
- Non-residential mortgage loan services;
- Personal non-mortgage loan services for non-business purposes;
- Credit card loan services
- Non-mortgage loan services for business purposes;
- Other credit-granting services.

1.5.8. Financial leasing services include:

- Services of making equipment and other assets available to a customer without capital investment on the customer's part, whereby the lessor pays

for and takes title to the equipment or facilities and leases it to the lessee while retaining few of the normal responsibilities of ownership.

1.5.9. Pension fund management services include:

- Pension fund management services.

1.5.10. Individual pension services include:

- Underwriting services of annuities, i.e. plans which provide income payments at regular intervals to individuals. Plans may require a single contribution or a series of contributions; may be compulsory or optional; may have nominal benefits determined in advance or dependent on the market value of assets supporting the plan; and, if related to employment, may or may not be portable with a change in employment. The duration of the period during which benefits are paid may be fixed in terms of a minimum or maximum; there may or may not be survivors' benefits.

1.5.11. Group pension services include:

- Underwriting services of plans which provide income payments at regular intervals to members of groups. Plans may require a single contribution or a series of contributions; may be compulsory or optional; may have nominal benefits determined in advance or dependent on the market value of assets supporting the plan; and, if related to employment, may or may not be portable with a change in employment. The duration of the period during which benefits are paid may be fixed in terms of a minimum or maximum; there may or may not be survivors' benefits.

1.6. MANAGEMENT, ADMINISTRATION AND BACK OFFICE SERVICES

Management, administration and back office services include:

- Legal services (see 1.6.1.);
- Accounting, auditing and bookkeeping services (see 1.6.2.);
- Tax consultancy and preparation services (see 1.6.3.);
- Insolvency and receivership services (see 1.6.4.);
- Management consulting and management services (see 1.6.5.);
- Business consulting services (see 1.6.6.);
- Other management services, except construction project management services (see 1.6.7.);
- Employment services (see 1.6.8.);
- Investigation and security services (see 1.6.9.);
- Travel arrangements, tour operator and related services (see 1.6.10.);
- Credit reporting services (see 1.6.11.);
- Collection agency services (see 1.6.12.);
- Telephone-based support services (see 1.6.13.);
- Combined office administrative services (see 1.6.14.);
- Specialized office support services (see 1.6.15.);
- Other information and support services n.e.c. (see 1.6.16.).

1.6.1. Legal services include:

- Legal advisory and representation services concerning criminal law;

- Legal advisory and representation services concerning other fields of law;

- Legal documentation and certification services;
- Arbitration and conciliation services;
- Other legal services n.e.c.

1.6.2. Accounting, auditing and bookkeeping services include:

- Financial auditing services;
- Accounting services;
- Bookkeeping services;
- Payroll services.

1.6.3. Tax consultancy and preparation services include:

- Corporate tax consulting and preparation services;
- Individual tax preparation and planning services.

1.6.4. Insolvency and receivership services include:

- Providing advice and operational assistance to the management and/or creditors of insolvent businesses and/or acting as receiver or trustee in bankruptcy.

1.6.5. Management consulting and management services include:

- Strategic management consulting services;
- Financial management consulting services;
- Human resources management consulting services;
- Marketing management consulting services;
- Operations management consulting services;
- Supply chain and other management consulting services;
- Business process management services;
- Head office services.

1.6.6. Business consulting services include:

- Public relations services;
- Other business consulting services.

1.6.7. Other management services, except construction project management services include:

- Coordination and supervision of resources in preparing, running and completing a project on behalf of the client;
- Project management services, which can involve budgeting, accounting and cost control, procurement, planning of time scales and other operating conditions, coordination of subcontractors' work, inspection and quality control, etc.
- Project management services that include management and office management services, with or without the provision of their own staff.

1.6.8. Employment services include:

- Executive/retained search services;
- Permanent placement services, other than executive search services;
- Contract staffing services;

- Temporary staffing services;
- Long-term staffing (payrolling) services;
- Temporary staffing-to-permanent placement services;
- Co-employment staffing services.

1.6.9. Investigation and security services include:

- Investigation services;
- Security consulting services;
- Security systems services;
- Armoured car services;
- Guard services;
- Other security services.

1.6.10. Travel arrangements, tour operator and related services include:

- Reservation services for air transportation;
- Reservation services for rail transportation;
- Reservation services for bus transportation;
- Reservation services for vehicle rental;
- Other transportation arrangement and reservation services n.e.c.
- Reservation services for accommodation;
- Time-share exchange services;
- Reservation services for cruises;
- Reservation services for package tours;
- Reservation services for convention centres, congress centres and exhibition halls;
- Reservation services for event tickets, entertainment and recreational services and other reservation services;
- Tour operator services;
- Tourist guide services;
- Tourism promotion services;
- Visitor information services.

1.6.11. Credit reporting services include:

- Services consisting of the reporting of credit ratings of persons and businesses;
- Evaluation of the financial status and credit experience of prospective customers, of loan applicants, etc.
- Credit investigation services.

1.6.12. Collection agency services include:

- Services consisting of the collecting of accounts, cheques, contracts or notes and of the remittance of the money to the client;
- Collection of regular accounts (e.g., utility bills) and the recovery of delinquent accounts;
- Outright purchase of delinquent accounts and debts and subsequent recovery.

1.6.13. Telephone-based support services include:

- Telephone call centre services;
- Other telephone-based support services.

1.6.14. Combined office administrative services include:

- Provision of a combination of day to day office administrative services, such as reception, financial planning, billing and record keeping, personnel and mail services etc. for others on a contract or fee basis.

1.6.15. Specialized office support services include:

- Duplicating services;
- Mailing list compilation services;
- Mailing services;
- Document preparation and other specialized office support services.

1.6.16. Other information and support services n.e.c. include:

- Other information services;
- Other support services n.e.c.

1.7. LICENSING SERVICES

Licensing services include:

- Licensing services for the right to use trademarks and franchises (see 1.7.1.);
- Licensing services for the right to use R&D products (see 1.7.2.);
- Licensing services for the right to use entertainment, literary or artistic originals (see 1.7.3.);
- Licensing services for the right to use mineral exploration and evaluation (see 1.7.4.);
- Licensing services for the right to use other intellectual property products (see 1.7.5.);
- Licensing services for the right to use databases (see 1.7.6.).

1.7.1. Licensing services for the right to use trademarks and franchises include:

- Licensing services for the right to use trademarks and to operate franchises in respect of other non-produced assets.

1.7.2. Licensing services for the right to use R&D products include:

- Licensing services for the right to use the outcome of research and development activities, i.e. inventions, such as constitutions of matter, processes, mechanisms, electrical and electronic circuits and devices, pharmaceutical formulations and new varieties of living things produced by artifice.

1.7.3. Licensing services for the right to use entertainment, literary or artistic originals include:

- Licensing services for the right to reproduce, distribute or incorporate entertainment, literary, musical or artistic originals such as:
 - broadcasting and showing of original films, sound recordings, radio and television programmes, prerecorded tapes and videos;
 - reproduction of original artworks;
 - reprinting and copying of manuscripts, books, journals and periodicals.

1.7.4. Licensing services for the right to use mineral exploration and evaluation include:

- Licensing services for the right to use mineral exploration and evaluation information, such as mineral exploration for petroleum, natural gas and non-petroleum deposits.

1.7.5. Licensing services for the right to use other intellectual property products include:

- Licensing services for the right to use other kinds of intellectual property products, such as architectural and engineering plans, industrial designs etc.

1.7.6. Licensing services for the right to use databases include:

- Licensing services for the right to reproduce, distribute or incorporate databases (i.e. compilations of facts/information) in other databases or applications. This applies to various levels of licensing rights:

- rights to reproduce and distribute the database;
- rights to use database components for the creation of and inclusion in other databases and applications.

1.8. ENGINEERING, RELATED TECHNICAL SERVICES AND R&D

Engineering, related technical services and R&D include:

- Research and experimental development services in natural sciences and engineering (see 1.8.1.);
- Research and experimental development services in social sciences and humanities (see 1.8.2.);
- Interdisciplinary research and experimental development services (see 1.8.3.);
- Industrial design services (see 1.8.4.);
- Research and development originals (see 1.8.5.);
- Design originals (see 1.8.6.);
- Technical testing and analysis services (see 1.8.7.);
- Architectural services, urban and land planning and landscape architectural services (see 1.8.8.);
- Engineering services (see 1.8.9.);
- Surface surveying and map-making services (see 1.8.10.);
- Weather forecasting and meteorological services (see 1.8.11.);
- Scientific and technical consulting services n.e.c. (see 1.8.12.);
- Publishing, printing and reproduction services (see 1.8.13.);
- Photographic processing services (see 1.8.14.);
- Translation and interpretation services (see 1.8.15.);
- Restoration and retouching services of photography (see 1.8.16.);
- Other photography services (see 1.8.17.);
- Interior design services (see 1.8.18.);
- Other specialty design services (see 1.8.19.);
- Drafting services, n.e.c. (see 1.8.20.).

1.8.1. Research and experimental development services in

natural sciences and engineering include:

- Basic research services in physical sciences;
- Basic research services in chemistry and biology;
- Basic research services in biotechnology;
- Basic research services in engineering and technology;
- Basic research services in medical sciences and pharmacy;
- Basic research services in agricultural sciences;
- Basic research services in other natural sciences engineering;
- Applied research services in physical sciences;
- Applied research services in chemistry and biology;
- Applied research services in biotechnology;
- Applied research services in engineering and technology;
- Applied research services in medical sciences and pharmacy;
- Applied research services in agricultural sciences;
- Applied research services in other natural sciences and engineering;
- Experimental development services in physical sciences;
- Experimental development services in chemistry and biology;
- Experimental development services in biotechnology;
- Experimental development services in engineering and technology;
- Experimental development services in medical sciences and pharmacy;
- Experimental development services in agricultural sciences;
- Experimental development services in other natural sciences.

1.8.2. Research and experimental development services in social sciences and humanities include:

- Basic research services in psychology;
- Basic research services in economics;
- Basic research services in law;
- Basic research services in languages and literature;
- Basic research services in other social sciences and humanities;
- Applied research services in psychology;
- Applied research services in economics;
- Applied research services in law;
- Applied research services in language and literature;
- Applied research services on other social sciences and humanities;
- Experimental development services in psychology;
- Experimental development services in economics;
- Experimental development services in law;
- Experimental development services in languages and literature;
- Experimental development services in other social sciences and humanities.

1.8.3. Interdisciplinary research and experimental development services include:

- Interdisciplinary basic research services;
- Interdisciplinary applied research services;
- Interdisciplinary experimental development services.

1.8.4. Industrial design services include:

- Design services for industrial products, i.e. creating and developing designs and specifications that optimize the use, value and appearance of products, including the determination of the materials, construction, mechanism, shape, colour and surface finishes of the product, taking into consideration human characteristics and needs, safety, market appeal and efficiency in production, distribution, use and maintenance.

1.8.5. Research and development originals include:

- Scientific originals, i.e. ideas, plans, blueprints, formulas for inventions, products and processes, which can be protected and licensed as industrial property, trade secrets, patents, etc.

1.8.6. Design originals include:

- Original design concepts, produced on own account:
 - industrial product designs
 - aesthetic designs
 - graphic designs

1.8.7. Technical testing and analysis services include:

- Composition and purity testing and analysis services;
- Testing and analysis services of physical properties;
- Testing and analysis services of integrated mechanical and electrical systems;
- Technical inspection services of road transport vehicles;
- Other technical testing and analysis services.

1.8.8. Architectural services, urban and land planning and landscape architectural services include:

- Architectural advisory services;
- Architectural services for residential building projects;
- Architectural services for non-residential building projects;
- Historical restoration architectural services;
- Urban planning services;
- Rural land planning services;
- Project site master planning services;
- Landscape architectural advisory services;
- Landscape architectural services.

1.8.9. Engineering services include:

- Engineering advisory services;
- Engineering services for building projects;
- Engineering services for industrial and manufacturing projects;
- Engineering services for transportation projects;
- Engineering services for power projects;
- Engineering services for telecommunications and broadcasting projects;

- Engineering services for waste management projects (hazardous and non-hazardous);
- Engineering services for water, sewerage and drainage projects;
- Engineering services for other projects;
- Project management services for construction projects.

1.8.10. Surface surveying and map-making services include:

- Surface surveying services;
- Map-making services.

1.8.11. Weather forecasting and meteorological services include:

- Providing meteorological analysis of the atmosphere and predicting weather processes and weather conditions.

1.8.12. Scientific and technical consulting services n.e.c. include:

- Environmental consulting services;
- Other scientific and technical consulting services n.e.c.

1.8.13. Publishing, printing and reproduction services include:

- Publishing, on a fee or contract basis and media, on a fee or contract basis;
- Printing services;
- Services related to printing;
- Reproduction services of recorded media, on a fee or contract basis.

1.8.14. Photographic processing services include:

- Sale or leasing of advertising time or space, on commission;
- Services of media buying agencies, which buy media space or time on behalf of advertisers or advertising agencies.

1.8.15. Translation and interpretation services include:

- Services generally related to the translation of texts from one language to another, resulting in a written document;
- Interpretation services are generally concerned with stating orally in one language what has been stated orally in another language.

1.8.16. Restoration and retouching services of photography include:

- Services consisting of old photograph restoration;
- Retouching and other special photographic effects.

1.8.17. Other photography services include:

- Microfilming services.

1.8.18. Interior design services include:

- Planning and designing of interior spaces to meet the physical, aesthetic and functional needs of people;
- Drawing up of designs for interior decorating;
- Interior decorating, including dressing of windows and stalls.

1.8.19. Other specialty design services include:

- Creating designs and preparing patterns for a variety of products by harmonizing aesthetic considerations with technical and other requirements, such as:

- furniture designs;
 - aesthetic design for various other customer products.
- Package design services;
- Production of three-dimensional models;
- Graphic design services, including graphic design for advertising purposes.

1.8.20. Drafting services, n.e.c. include:

- Drafting services (detailed layouts, drawings, plans and illustrations of buildings, structures, systems or components from engineering and architectural specifications, done by architectural draftsmen or engineering technicians).

1.9. EDUCATION & TRAINING SERVICES

Education and training services include:

- Pre-primary education services (see 1.9.1.);
- Primary education services (see 1.9.2.);
- Secondary education services (see 1.9.3.);
- Post-secondary non-tertiary education services (see 1.9.4.);
- Tertiary education services (see 1.9.5.);
- Educational support services (see 1.9.6.);
- Cultural education services (see 1.9.7.);
- Sports and recreation education services (see 1.9.8.);
- Other education and training services, n.e.c. (see 1.9.9.).

1.9.1. Pre-primary education services include:

- Education services usually provided by nursery schools, kindergartens, pre-schools, centres for early childhood education, centres for infant education or special sections attached to primary schools. Pre-primary education (ISCED Level 0) is defined as the initial stage of organized instruction designed primarily to introduce very young children to a school-type environment, that is, to provide a bridge between the home and a school based atmosphere;

- Services related to the provision of special education programmes at this educational level.

1.9.2. Primary education services include:

- Educational services provided at ISCED Level 1, which includes programmes designed to provide students with an initial basic education in reading, writing and mathematics along with an elementary understanding of other subjects such as history, geography, natural science, social science, art and music;

- services related to the provision of special education programmes at this educational level;

- services related to the provision of literacy programmes for adults at this educational level.

1.9.3. Secondary education services include:

- Lower secondary education services, general;
- Lower secondary education services, technical and vocational;
- Upper secondary education services, general;
- Upper secondary education services, technical and vocational.

1.9.4. Post-secondary non-tertiary education services include:

- Post-secondary non-tertiary education services, general;
- Post-secondary non-tertiary education services, technical and vocational.

1.9.5. Tertiary education services include:

- First stage tertiary education services;
- Second stage tertiary education services.

1.9.6. Educational support services include:

- Non-instructional services that support educational processes or systems, such as:
 - educational consulting;
 - educational guidance counselling services;
 - educational testing evaluation services;
 - educational testing services;
 - organization of student exchange programmes.

1.9.7. Cultural education services include:

- Piano and other music instruction;
- Art instruction;
- Dance instruction and dance studios;
- Art instruction except academic;
- Photography instruction.

1.9.8. Sports and recreation education services include:

- Sports instruction (baseball, basketball, cricket, football, hockey, tennis, figure skating, etc.);
- Camps, sports instruction;
- Gymnastics instruction;
- Riding instruction;
- Swimming instruction;
- Martial arts instruction;
- Card game instruction (such as bridge);
- Yoga instruction.

1.9.9. Other education and training services, n.e.c. include:

- Training for car, bus, lorry and motorcycle driving licenses;
- Training for flying certificates and ship licenses;
- Management training services;
- Services provided by music camps, science camps, computer camps and other instructional camps, except for sports;
- Education services not definable by level.

NOTES



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