

An Overview of Indian IT and ITeS Sector

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Abstract:

In today's digital era, the Indian IT and ITeS sector is a success story as it made India a global leader in the Information technology and business process outsourcing. The IT and ITeS sector is a critical pillar in India's economic growth. According to NASSCOM the sector at present is generating estimated revenue of around USD 168 billion, including an export of USD 126 billion on an annual basis, which is around 8% contribution to India's GDP. The industry is also one of the largest organized sector employers, generating approx. 14 million direct and indirect jobs. It is further estimated that the industry can contribute up to 350 billion USD accounting for 10 percent of India's GDP by 2025. In this backdrop an attempt has been made in this paper to analyse the overview of Indian IT and ITeS sector.

Keywords: Information Technology (IT), Information Technology enabled Services (ITeS), Government of India, Exports, Employment.

Introduction:

As per NASSCOM Strategic Review 2017, the Global Software Product Industry estimated to be USD 413 billion. But, the contribution of Software Products in Indian IT-ITES revenue is USD 7.1 billion out of which 2.3 billion USD are exports. But import of Software Products estimated to be nearly 10 billion USD, so as such India is a net importer of software products at present. (National Policy on Software Products, 2019)

Information Technology (IT) means creating, managing, storing and exchanging information. IT includes all types of technology used to deal with information, such as computer hardware and software technology used for creating, storing, and transferring information.

IT is a tightly integrated part of business. Computers and information systems are an essential part of every business today. Like accounting and legal, every business needs to invest in technology to compete. IT has several benefits for a business, such as it helps in reaching more potential customers, developing a business relationship with potential customers, streamlining operations, reducing costs, improving efficiency, maximising profit, minimising waste, providing better service to customers, supporting better relationships with key partners, and allowing customers to better guide the business.

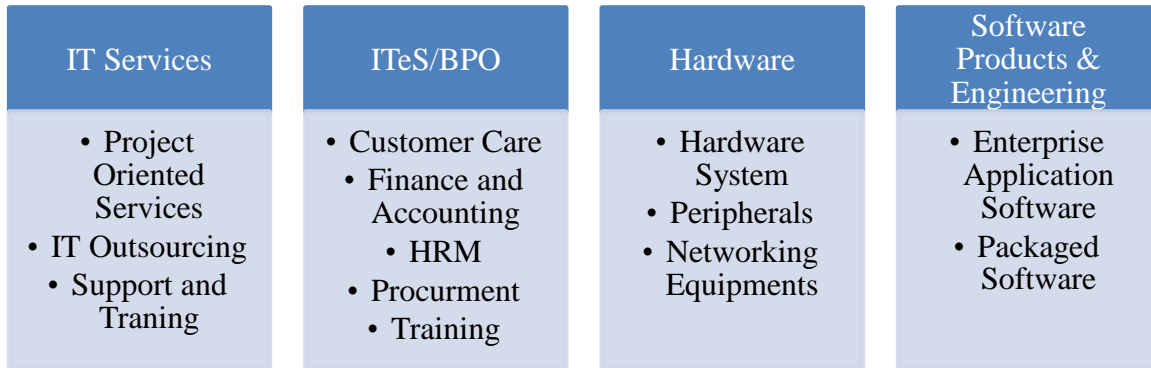
But, Information Technology that enables the business by improving the quality of service is Information Technology enabled Services (ITeS). ITeS is also called web-enabled services or remote services that cover the entire operations which exploit Information Technology for improving the efficiency of an organisation. These services provide a wide range of career options that include opportunities in all offices like call centers, payrolls, logistics management, revenue claims processing, medical billing, coding, medical transcription, legal databases, back-office operations, content development, GIS (geographical information system), web services and Human Resource (HR) services, etc.

E-enabled services radically reduce costs and improve service standards. In short, Internet service provider aims to provide B2B e-commerce solutions. ITeS offers different services integrated in a single delivery mechanism to end users. The services may include: Medical Transcription, Customer Relationship Management, Data Entry and Data Processing, Software development, Data Warehousing, IT Help Desk Services, Enterprise Resource Planning and Telecommunication Services. (NCERT, 2018)

Composition of IT and ITeS Sector

The definition of IT (Information Technology) is the common term for the entire spectrum of technologies for information processing, including software, hardware, communication technologies, and related services. The composition of the segment shown in the figure below:

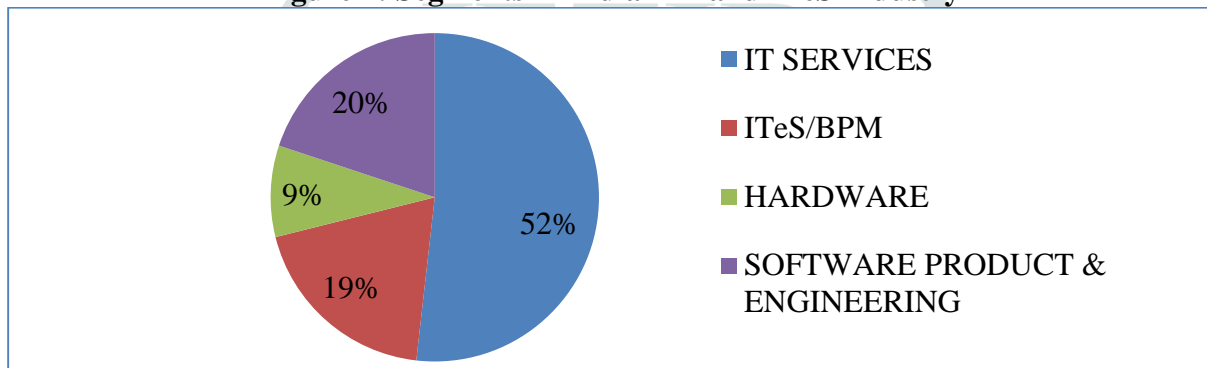
Figure 1: Composition Indian IT and ITeS Industry



Source: ICSI, 2018

Indian IT (Information Technology) and ITeS (Information Technology enabled Services) industry has 4 major segments namely, IT Services, Business Process Management, Hardware and Software products and engineering services.

Figure 1: Segments in Indian IT and ITeS Industry



Source: Nasscom, Make in India, IDC

The Indian IT and ITeS sector dominated by large players. As per NASSCOM, there are 11 large companies having a presence in over 60 countries with 47-50% of total export revenues. And 120 to 150 companies with 32-35% of total export revenue with near shore and offshore presence in more than 30-35 countries. While there are 16000 to 16200 small companies with 18-20% of total export revenue. Export revenue from the industry has grown at a CAGR of 11.85% to US\$ 126 billion in 2017-18 from US\$ billion in 2009-10.

Table 1: Segment wise revenue generated in IT and ITeS (INR in Billion)

Year/Segment	2013-14	2014-15	2015-16	2016-17	2017-18	CAGR (2013-18)
IT Service	72721.6	81662	89562	100500	113600	11.37%
ITeS-BPO	19593.8	21490	23364	26800	26800	8.90%
Software Products Engineering Services	22468.8	25788	27907	33500	33500	10.32%
Total IT-ITeS	114784.2	128940	140833	160800	173800	10.75%

Source: <http://meity.gov.in/content/statistics>

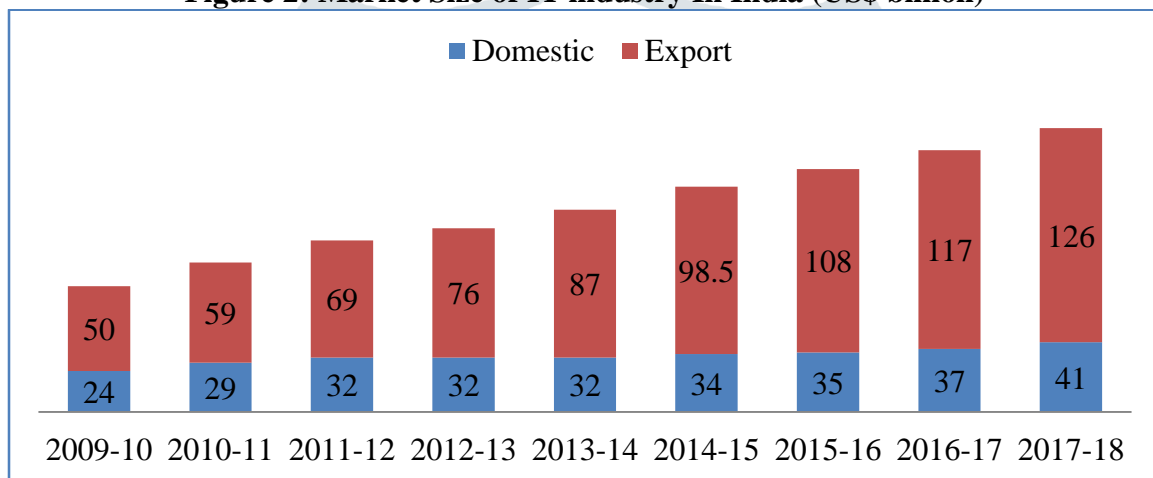
IT Services has been the most promising segment for the IT-ITeS sector in India. Export of services continues to be the mainstay of this segment. ITeS segment is growing with CAGR of 8.9%. Engineering R&D and Product Development is growing with the rate of 10.32 % CAGR.

Table 2: Segment wise growth of last five financial years (INR crores)

Year	IT-Service	IteS-BPO	Software Products & Engineering Services	Total
2013-14	72721.6	19593.8	22468.8	114784.2
2014-15	81662	21490	25788	128940
2015-16	89562	23364	27907	140833
2016-17	100500	26800	33500	160800
2018-18	113600	26800	33500	173800

Source: <http://meity.gov.in/content/performance-contribution-towards-exports-IT-ITeS-industry>

From the above table it is evident that all the segments of Indian IT and ITeS sector have grown to a very good extent. And numbers reveal that IT services are major contributing segment to IT and ITeS sector.

Figure 2: Market Size of IT industry In India (US\$ billion)

Source: Nasscom, Make in India, IDC

India is the largest, fastest and growing destination for IT and ITeS sourcing across the world. Indian IT and ITeS sector contributes approximately 55% market share i.e., US\$ 185-190 billion to global services sourcing business in 2017-18. IT and ITeS industry revenues (excluding hardware) estimated at around US\$ 167 billion in FY 2017-18 and grew to US\$ 181 billion in FY2018-19. The domestic revenue including the hardware of the IT industry estimated at US\$ 44 billion and export revenue estimated at US\$ 137 billion in FY19. The contribution of the IT sector to India's GDP stood at 7.9 percent in 2017-18. Indian IT and ITeS sector accounts for the largest share on total Indian services export (> 45%).

Exports Revenue segments wise in IT/ITeS Sector

Exports of IT services have the largest contribution of around 57 % which amounts to USD 86 billion approximately. The Engineering Research and Development and product development contribute 21.8 % of the total exports. The ITES segment which mainly comprises the Business process outsourcing has a share of 21.2 %. The data has been presented in the figure given below. The table given below reflects the quantum of contribution (USD billion) from each segment.

Table 3: Contribution from each segment of ITeS in USD billion

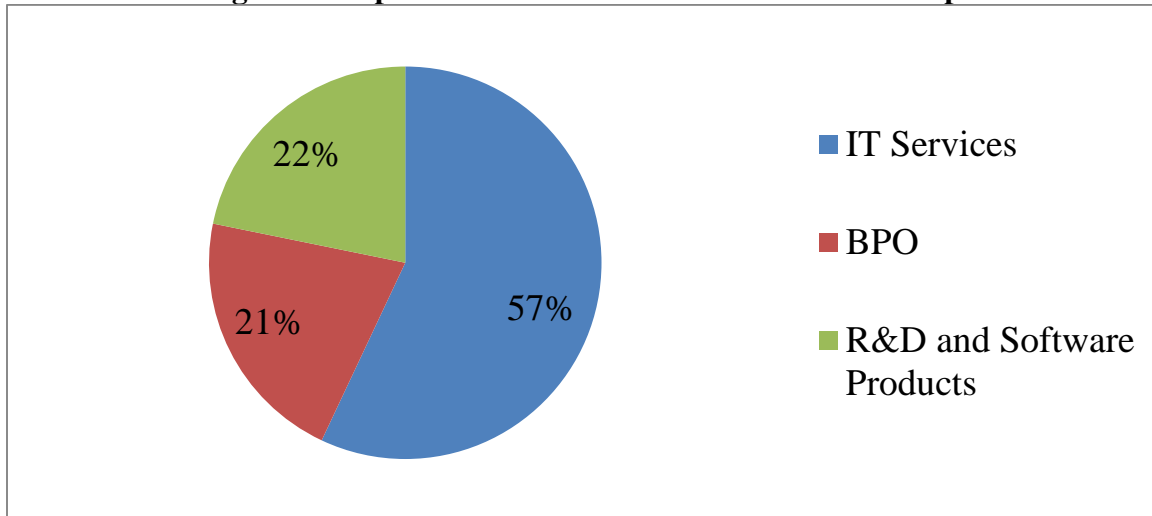
Year/Segment	2013-14	2014-15	2015-16	2016-17	2017-18	CAGR (2013-18)
IT Service	49.2	55.3	61.0	66.0	69.3	10.07%
ITeS-BPO	20.4	22.5	24.4	26.0	28.4	9.19%
Software Products, Engineering	17.7	20.0	22.4	25.0	28.3	13.09%

Services, R&D						
Total IT-ITeS	87.3	97.8	107.8	117.0	126.0	10.32%

Source: <http://meity.gov.in/content/performance-contribution-towards-exports-it-ITeS-industry>

The above table reveals that IT-ITeS exports' contribution is at US\$ 126.0 billion for FY2017-18. The growth over last year is at 7.5 %.

Figure 4: Export Revenue 2017-18 Sector wise Breakup



Source: Nasscom, Department of Electronics and IT Annual Report

Export Destinations

The USA, UK and EU remain the major markets for the Indian IT software and services exports, accounting for approximately 90% of the total IT-ITeS exports. Demand from Asia Pacific (APAC), Latin America and Middle East Asia is growing. The share of export markets in FY2017-18 is given below in Table 4.

Table 4: Share of IT software and services exports

USA	62%
UK	16%
Europe (Excluding UK)	11%
Asia	8%
Rest of world	2%

Source: ICSI, 2018

Domestic Market Revenue share of various segments in IT/ITeS Sector

No doubt IT/ITeS Sector in India is export-oriented, however the domestic market has also been rising and has now become a significant contributor to the sector. The performance of IT-ITeS (excluding hardware) on yardstick of revenue (INR100 crores/ billion) is shown in the Table 6 given below:

Table 5: Segments wise Revenue Generation in ITeS (INR Billion)

Year/Segment	2013-14	2014-15	2015-16	2016-17	2017-18	CAGR (2013-18)
IT Service	72721.6	81662	89562	100500	113600	10.07%
ITeS-BPO	19593.8	21490	23364	26800	26800	9.19%
Software Products, Engineering Services, R&D	22468.8	25788	27907	33500	33500	13.09%
Total IT-ITeS	114784.2	128940	140833	160800	173800	10.32%

Source: <http://meity.gov.in/content/performance-contribution-towards-exports-IT-ITeS-industry>

As evident from the above table the revenue contribution from Domestic operations of IT and ITeS (excluding hardware) is around INR 1738 billion for FY2017-18. The growth over last year's is at 8.7 %. Cumulative growth rate for the last five years stands at 10.75%.

Contribution to Economy

The sector ranks 3rd in India's total Foreign Direct Investment (FDI) share with US\$ 29.825 billion of FDI inflows between April, 2000 and December, 2017. IT sector alone contributes to around 7.5 percent to the GDP of India. The following table provides the comparative figures of Exports and Domestic in USD Billion.

Table 6: Revenues from exports and domestic business (In USD Billion)

Year	Exports	Domestic	Total
2013-14	87.3	19	106.3
2014-15	97.8	21	118.8
2015-16	107.8	21.7	129.5
2016-17	117	24	141
2017-18	126	25	151

Source: <http://meity.gov.in/content/performance-contribution-towards-exports-it-ITeS-industry>

Employment

The direct employment in the IT services and BPO/ITeS segment is expected to grow by about 4.0 % reaching and add around 1,05,000 employees during the year 2017-18 reaching a total of 3.96 million, which is a significant achievement for the sector. The IT and ITeS sector workforce is becoming increasingly diverse in terms of socio-economic, linguistic, multinational and regional backgrounds. The details of direct employment by the sector for both, the exports segment and domestic market segment from 2013 to 17 years are given below (in Millions):

Table 7: Segment wise revenues for past four financial years

Year/Segment	2013-14	2014-15	2015-16	2016-17
IT Service	1.6	1.74	1.846	1.921
ITeS-BPO	0.989	1.03	1.086	1.152
Software Products, Engineering Services, R&D	0.699	0.745	0.758	0.790
Total IT-ITeS	3.267	3.485	3.690	3.863
Net Addition	0.301	0.218	0.203	0.173

Source: <http://meity.gov.in/content/employment>

Scope of the Industry

Some important scope of the industry includes:

Customer Interaction & Support (CIS): It includes all forms of IT-enabled customer contact; inbound or outbound, voice or non-voice based support used to provide customer services, sales and marketing, technical support and help desk services.

Finance & Accounting (F&A): It includes activities such as general accounting, transaction management, account receivables and payables management, corporate finance (e.g. treasury and risk management, and tax management); compliance management and statutory reporting, etc.)

Horizontal-Specific BPM Services: Services that are reasonably similar across industries. Horizontal BPM services include Customer Interaction and Support (CIS), Finance and Accounting (F&A) and other related processing services, Knowledge Services, Human Resource Management (HRM), Procurement BPM, etc.

Human Resources Processing: HR processing services include services that support the core HR activities plus talent management activities and associated business processes, such as benefits, payroll and talent management.

Knowledge Services: Business research, Market research, Data management & reporting, Data analytics, Social media research, risk management. (ICSI, 2018)

As per Central Board of Direct Taxes (CBDT) notification No. 890E dated 26.09.2000, the list of eligible IT enabled services under BPO operations considered in IBPS are as under:

- Back Office Operations
- Call Centers
- Content Development or Animation
- Data Processing
- Geographic information System Services
- Human Resource Services
- Insurance Claim processing
- Legal Databases
- Medical Transcription
- Payroll
- Remote Maintenance
- Revenue Accounting
- Support Centers
- Website Services

Composition of IT and ITeS Sector Indian IT and ITeS follow the global trend and sector is dominated by large players. Captive technology centers and medium organizations are contributing around 35 percent of the total exports. The organizations in this domain are shifting from economies of scale to economies of scope and finding new possibilities to become an integrated service provider. The emerging and small organizations are contributing 20 percent and 18 percent respectively towards the total exports revenue. These organizations are working in specialized services and verticals.

Table 8: Composition of IT and ITeS Sector

Category	Number of Players	Percentage of Total export revenue	Percentage of total employees
Large	11	47-50%	35-38%
Medium	120-150	32-35%	28-30%
Emerging	1,000-1,200	9-10%	15-20%
Small	15,000	9-10%	15-18%

Source: ICSI, 2018

Initiatives of Government of India

The ministry has classified the industries activities in following broad categories:

1. Software and Services Sector
2. Industrial Promotion Activities
3. Export Promotion Schemes
4. Schemes & Policies - Electronic Hardware
5. Electronic System Design & Manufacturing

The contribution of IT/ITeS in creating job opportunities has been incomparable in India Performance of the industry in the last decade has been quite impressive with increased share in the GDP of India peaked at 7.9 percent for the FY 2017-18. Across the world India is credited with being one of the most preferred off-shoring destinations. IT/ITeS organizations in India have performed with dominance in services to global clients for on-shore and off-shore services as well.

The Ministry of Electronics and Information Technology has been emphasizing on activities to promote programmes for skill development and uplifting infrastructure capabilities. Research and Development programmes are being encouraged at every possible level to maintain India's strategic advantage in IT and IT-enabled Services in the global market. The government of India envisions a digitally equipped India. One of the great initiatives in this context is carving out Ministry of Electronic and Information Technology from the Ministry of Communications and Information Technology. The ministry was earlier functioning as The Department of Electronics and Information Technology (DeitY). Some of the initiatives by Government of India are as follows:

Electronic and Computer Software Export Promotion Council (ESC)

Electronics and Computer Software Export Promotion Council (ESC) represents the interests of Indian electronics and IT sector at numerous forums including international trading arena of the Electronic and Computer Software, Joint Trade Committees of Ministry of Commerce, as well as at Joint Business Councils of various countries. Under the aegis of the Council, the IT services exports have reached the shores of more than 200 countries across the world establishing India's leadership in quality and competitiveness. ESC has a strong membership base across the country covering the entire gamut of Electronics and Software Industry. ESC offers a basket of services to its members for boosting exports.

Software Technology Parks of India (STPI)

Software Technology Parks of India were set up in 1991 as an autonomous society under the ministry. STPI's main objective has been the promotion of software exports from the country. STPI acts as 'single-window' in providing services to the software exporters. STPI has set-up a total of 57 STPI operational centers/sub-centers across the country, out of which 49 centres are in Tier II and Tier III cities.

During the FY 2016-17, estimated IT/ ITeS export made by STPI registered units are 350679.7 crore which annually account for about 50% of total software exports. The services rendered by STPI for the software exporting community have been statutory services, data communications services, incubation facilities, training and value added services. STPI has played a key developmental role in the promotion of software exports with a special focus on SMEs and start up units. STPI is working closely with respective state governments/local authorities for creation of more space, equipped with the state-of-the-art infrastructure facilities, for development of the software industry and increasing exports.

Benefits under STP Scheme:

- Customs Duty Exemption in full on imports.
- Central Excise Duty Exemption in full on indigenous procurement.
- All relevant equipment / goods including second hand equipment can be imported (except prohibited items).
- Equipment can also be imported on loan basis/lease.
- 100% FDI is permitted through automatic route.
- Sales in the DTA up to 50% of the FOB value of exports permissible.
- Use of computer imported for training permissible subject to certain conditions.
- Depreciation on computers at accelerated rates up to 100% over 5 years is permissible

Export Promotion Schemes

The IT and ITeS sector employs 34% women, out of total 39.68 lakhs employees for FY 2017-18. After the economic reforms of 1991-92, liberalization of external trade, elimination of duties on imports of information technology products, relaxation of controls on both inward and outward investments and foreign exchange and the fiscal measures taken by the Government of India and the individual State Governments specifically for IT and ITeS have been major contributory factors for the sector to flourish in India, and for the country to be able to acquire a dominant position in offshore services in the world. The major fiscal incentives provided by the Government of India have been for the Export Oriented Units (EOU), Software Technology Parks (STP), and Special Economic Zones (SEZ).

Special Economic Zones (SEZ) Scheme

In 2005, the Department of Commerce, Ministry of Commerce & Industry, Government of India has enacted the Special Economic Zone (SEZ) Act, with an objective of providing an internationally competitive and hassle free environment for exports. A SEZ is defined as a "specifically demarked duty-free enclave and shall deemed to be foreign territory (out of Customs jurisdiction) for the purpose of trade operations and duties and tariffs". The SEZ Act, 2005, supported by SEZ Rules, came into effect on 10th February, 2006. It provides drastic simplification of procedures and a single window clearance policy on matters relating to central and state governments. The scheme is ideal for bigger Industries and has a significant impact on future Exports and employment.

The SEZ policy aims at creating competitive, convenient and integrated Zones offering World class infrastructure, utilities and services for globally-oriented businesses. The SEZ Act 2005 envisages key role for the State Governments in Export Promotion and creation of related infrastructure.

India BPO Promotion Scheme (IBPS)

The India BPO Promotion Scheme (IBPS) has been approved under Digital India Programme, to incentivize BPO/ITES Operations across the country [excluding certain cities and the States in North-East Region (NER)], for the creation of employment opportunities for the youth and growth of IT-ITES Industry. IBPS aims to incentivize establishment of 48,300 seats distributed among each state in proportion of state's population, with financial support up to Rs. 1 lakh/seat in the form of Viability Gap Funding (VGF), with an outlay of Rs. 493 crores up to 31.03.2019.

Geography of Operations and Government Initiatives

Major cities which are important for IT/ITeS within India include Bangalore, Chennai, Hyderabad, Pune and NCT. The government of India under the The India BPO Promotion Scheme (IBPS) has been attempting to increase the reach of the IT/ITeS by setting up state of art Software Technology Parks (STP) in India. At present most state governments are expressing interest to set up STPs and making IT/ITeS industry widespread in India. Details of the scheme are shared in the next section of Government Initiatives.

Industrial Promotion Activities

Ministry of Electronics and Information Technology (MeitY) has been putting its best foot forward for promotion programmes to boost the IT and Electronic Hardware sector. Emphasis has been laid on developing adequate infrastructure enabling research and development to promote growth of the market size. Training plays vital role in drawing optimum development of business management capacity by utilizing the existing infrastructure and giving the organisations the competitive advantage. Ministry through its flagship India BPO promotion scheme has designed a mechanism to encourage participation which is evenly spread across the contours of the nations. Special endeavour is being unleashed through dedicated task force which will enable professionals to sharpen their skills in technologies which will help the industry to move ahead and make new benchmarks.

Some of the major promotional activities in the field of Information Technology and Electronics Hardware Manufacturing include the following: creating the right infrastructure in the country that is conducive to growth, broaden the markets and create a level playing field, provide R&D expertise and training programmes, assist in building a better and strong competitiveness among organizations. Providing latest information on industry trends, management models, market and advanced technologies.

Tax Incentives

GST rate for all kinds of IT Software supply which may include services, products, and supply on media, electronic download and temporary transfer of Intellectual Property (IP) has been ascertained at 18% with full Input Tax Credit (ITC). Delivering services from various locations and integrated pricing for the contract as a whole is the norm in IT/ITES industry. Normally the contract or agreement with the recipient is entered into by one of the branches (say "Principal Branch"). Therefore, in such cases of service delivery from multiple locations of the supplier to the recipient, the supply could be visualized as consisting of two distinct supplies.

First supply- the different branches of the supplier located across different States are making the supply to the main branch which entered into a contract or an agreement with the recipient for the supply of such service. Second supply- main branch is making a supply to the customer. GST is to be levied accordingly. In such a scenario, the main branch would get input tax credit of GST paid by the other branches on supplies made by them to the main branch.

Duty Exemption and Remission Schemes

Duty exemption schemes enable duty free import of inputs required for export production. Duty exemption schemes consist of:

1. Advance Authorization Scheme: Advance Authorization is issued to allow duty free import of inputs, which are physically incorporated in export product.
2. Duty Free Import Authorization (DFIA) scheme DFIA is issued to allow duty free import of inputs which are required for the production of an export product

A duty remission scheme enables post export replenishment / remission of duty on inputs used in export product. Duty Remission Schemes consist of:

1. Duty Entitlement Passbook (DEPB) Scheme: Duty Entitlement Pass Book Scheme (DEPB) is an export incentive scheme. It has been conceptualized with the objective to neutralize the impact of customs duty in international transactions. The neutralization is provided as credit against the export product.
2. Duty Drawback (DBK) Scheme: DBK scheme has provisions to refund duty of customs and duty of central excise that are levied on imported and indigenous materials used in the manufacture of exported goods.

Deemed Exports

“Deemed Exports” refer to those transactions in which the goods supplied do not leave the country and the payment for such supplies is received either in Indian rupees or in free foreign exchange. The following categories of supply of goods by the main/ subcontractors are regarded as “Deemed Exports” under the Foreign Trade Policy, provided the goods are manufactured in India:

- a. Supply of goods against Advance Authorization/Advance Authorization for annual requirement/DFIA;
- b. Supply of goods to Export Oriented Units (EOUs) / Software Technology Park (STP) units / Electronic Hardware Technology Park (EHTP) units / Bio Technology Park (BTP) units;
- c. Supply of capital goods to Export Promotion Capital Goods (EPCG) Authorization holders;
- d. Supply of goods to projects financed by multilateral or bilateral Agencies/Funds as notified by the Department of Economic Affairs, Ministry of Finance under International Competitive Bidding (ICB) in accordance with the procedures of those Agencies/Funds, where the legal agreements provide for tender evaluation without including customs duty;
- e. Supply of capital goods, including in unassembled/disassembled condition as well as plants, machinery, accessories, tools, dies and such goods which are used for installation purposes till the stage of commercial production, and spares to the extent of 10% of the FOR value to fertilizer plants;
- f. Supply of goods to any project or purpose in respect of which the Ministry of Finance, by a notification, permits the import of such goods at zero customs duty;
- g. Supply of goods to the power projects and refineries not covered in (f) above;
- h. Supply of marine freight containers by 100% EOU (Domestic freight containers -manufacturers) provided the said containers are exported out of India within 6 months or such further period as permitted by the customs;
- i. Supply to projects funded by UN agencies; and
- j. Supply of goods to nuclear power projects through competitive bidding as opposed to ICB.

Modified Special Incentive Package Scheme (M-SIPS)

To offset disability and attract investments in Electronic manufacturing, Modified Special Incentive Package Scheme (M-SIPS) was notified on 27.7.2012. The scheme is available for both new projects and expansion projects. The scheme provides capital subsidy of 20% in SEZ (25% in non-SEZ) for units engaged in electronics manufacturing. It also provides for reimbursements of CVD/ excise for capital equipment for the non-SEZ units. For some of the high capital investment projects it provides for reimbursement of Central Taxes and Duties The incentives are provided on reimbursement basis.

The incentives were available for 29 electronic verticals. Units all across the manufacturing value chain are covered under the scheme. For each of the product category, an investment threshold is prescribed which an applicant has to incur for getting eligible for incentives. The investment threshold varies from Rs 1 Crore to Rs 5000 Crores depending upon a type of project. The incentives are available for 10 years from the date of approval. The scheme was initially opened for 3 years till 26-07-2015.

The scheme was amended on August 3, 2015. The salient amendments include (i) The term of the scheme has been extended upto 27-07-2020. (ii) The scope of the scheme has been extended to cover additional verticals. (iii) The procedure for grant of approval has been simplified and streamlined. The incentives are now available for investments made in a project within a period of 10 years from the date of application. The M-SIPS require applicants to submit applications with Financial Closure (tied up funds) for the project they propose to execute. The Financial Closure for a project, however, can be given in phases. (ICSI, 2018)

Conclusion

Information Technology has become a part of everyday life and it made day to day working simple. We can see use IT in library, workplace, education, entertainment, communication, business, science and engineering, banking, insurance, marketing, health care and even in government and public service. The Indian IT and ITeS Sector is fueling India's economic growth. Along with contributing towards country's GDP the sector is also providing range of benefits like creating employment opportunity, rising income levels of employees and promoting exports. No doubt the IT and ITeS Sector has placed India on the world map with an image of quality technology service provider at affordable cost.

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