



INVEST INDIA
NATIONAL INVESTMENT PROMOTION
& FACILITATION AGENCY

ICT Opportunity in India

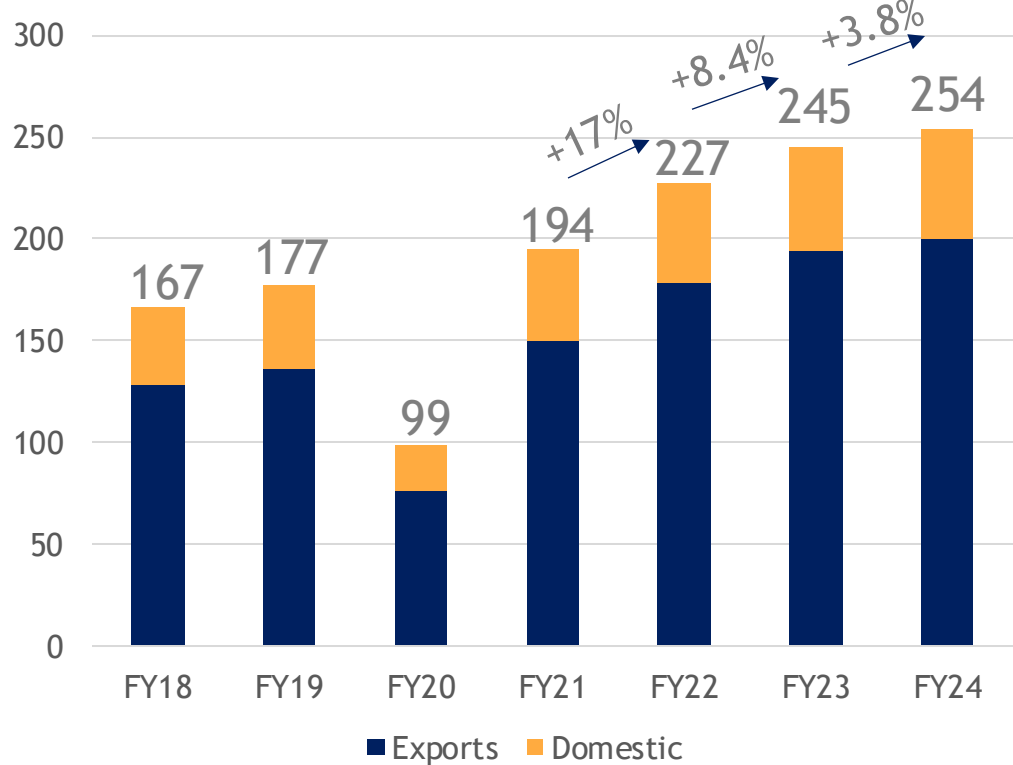


Technology Sector Overview

The sector remains a bright spot despite global contraction



ICT Sector Revenue (\$ Bn)*



*ICT sector primarily includes IT Services (50%), BPM Services (25%) & ER&D (25%)

Sector Snapshot (FY24)

7% Relative share to India's GDP	\$200 Bn Exports	\$19 Bn IT FDI‡ Inflows
5.6 Mn Employees	31K+ Tech Startups	38K Technology Firms
1700+ Global Capability Centers	34% Share of Digital Revenue	318K Tech patents filed† (2012-22)

Source: NASSCOM

†International Patents filed in 2021 = 2,053

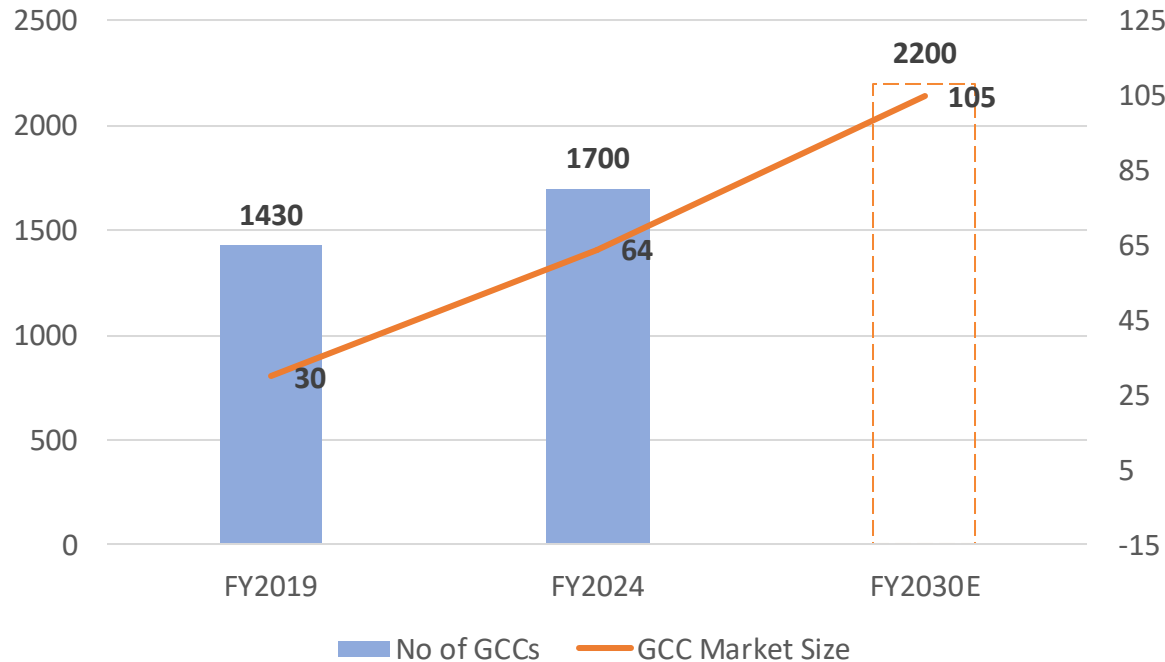
‡IT FDI Flows Include Computer Software & Hardware along with BPM Services like Outsourcing, R&D, Tech Testing & Analysis

India is the “Global Capability Center” Capital of the World

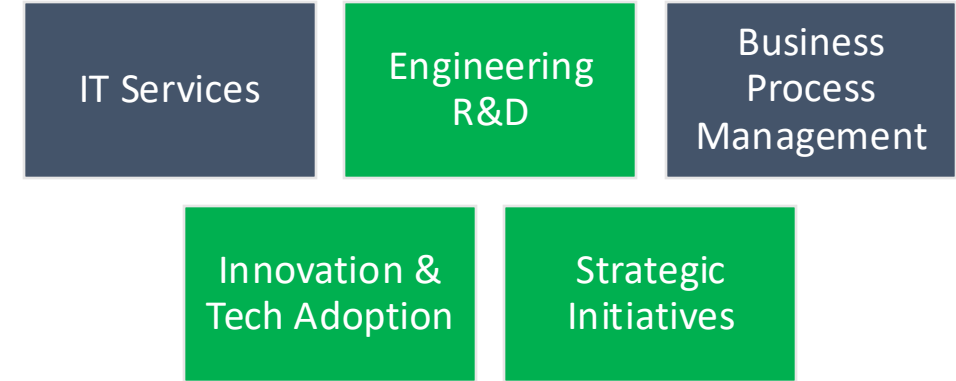
The Ecosystem Saw A Strategic Shift From Cost Centers To Value Centers



GCC Growth in India



Key Functions of GCCs



- Investments in AI, Cloud, Cybersecurity and Blockchain
- Increasingly setting up Product Management Function
- Multi-function centers delivering IT, BPM & ER&D services

- 1.9M Total Installed GCC Talent
- \$36B GCC ER&D Revenue
- 500 Global 2000 MNCs have a GCC in India
- 40 Global Unicorns have a GCC in India

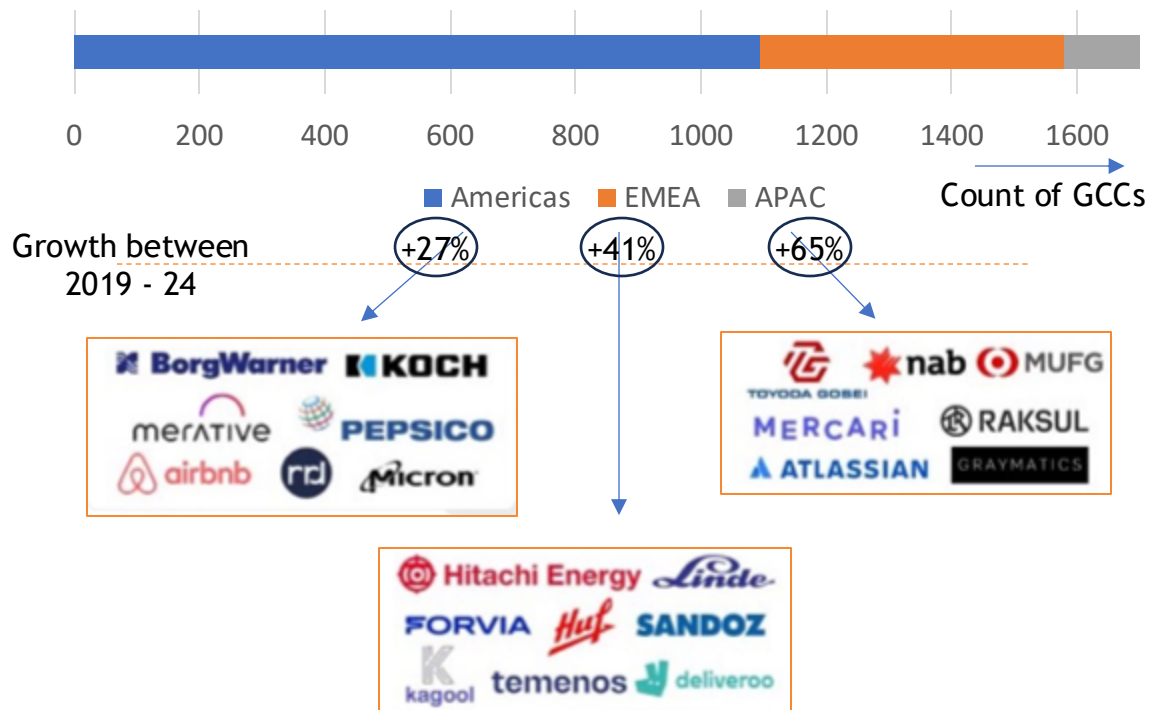
Global Marquee Players with a GCC in India



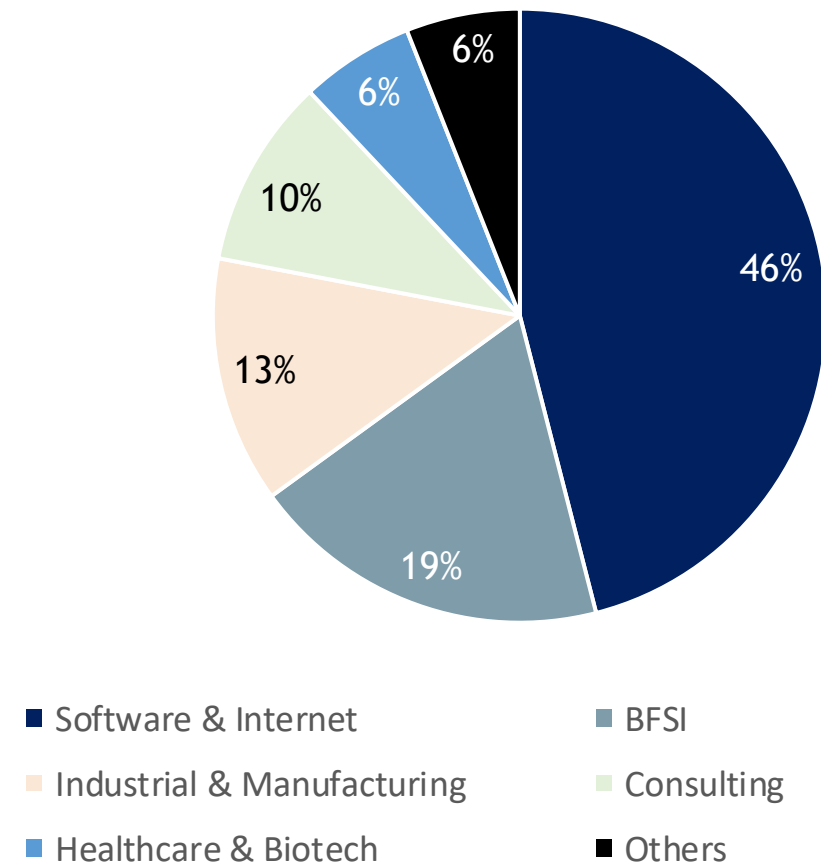
Truly A Global Destination for GCCs

USA Based Firms Lead The Segment; Significant Growth Coming From RoW

GCC Geographical Split



Vertical-wise GCC split



India's Value Proposition

Favorable Factor Conditions And Strong Supporting Ecosystem



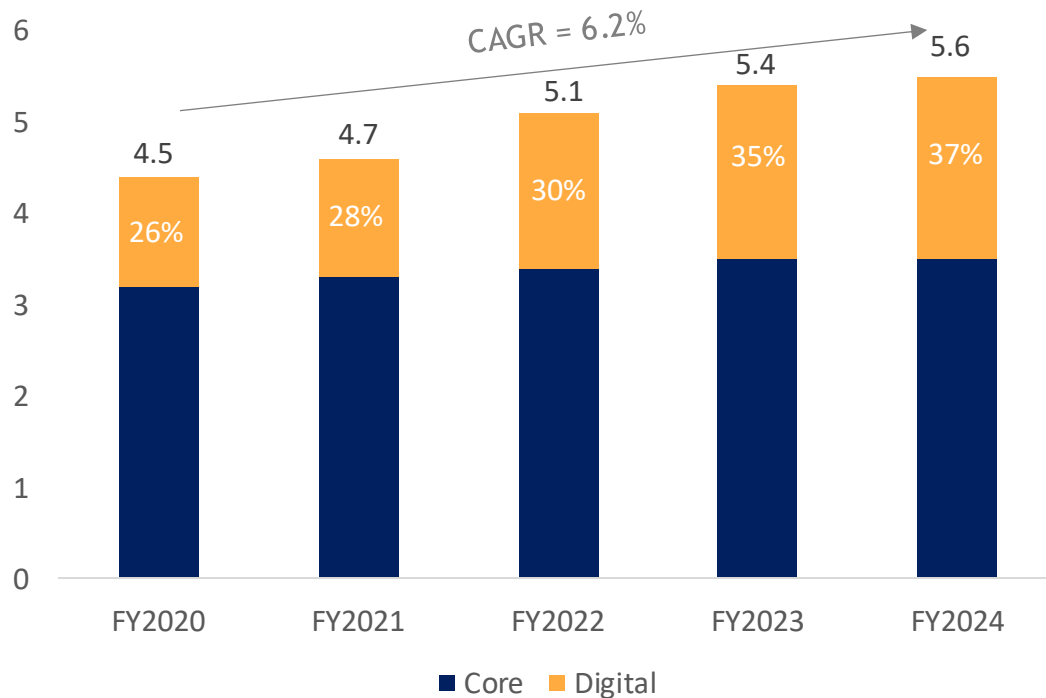
1. Technology Talent
2. Supporting Infrastructure
3. Thriving ICT Ecosystem

India's Technology Talent

Massive talent pool, a steady growth and a rising share of emerging tech skills



India's Technology Talent (in Mn)



**Digital talent refers to skill sets required for executing digital transformation projects, including mainstream and emerging technology skills in AI, ML, Blockchain etc.*

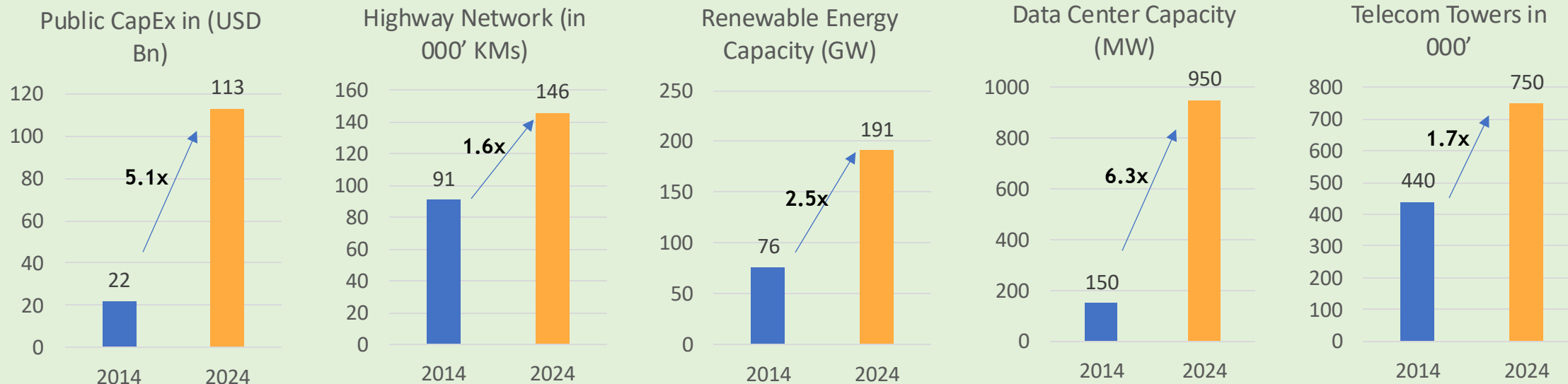
- #1 Lowest tech talent supply gap among leaders like USA, UK, Canada, and Australia
- #2 Second largest annual supply of STEM graduates at 2.5 Mn
- #1 #1 in AI skill penetration and concentration; Installed AI Talent base of 450K
- 50% Annual operating cost per FTE is 50% of Beijing and 25% of Singapore

India's Infrastructure Revolution

Business Environment Being Turbocharged By Focused Infrastructure Spending



India's Infrastructure Growth 2014 - 2024



India's Digital Public Infrastructure



1,366 Mn
Enrollments



14,900 Mn
Monthly Transactions



324 Mn
Registered Users



293 Mn
Healthcare Records Linked

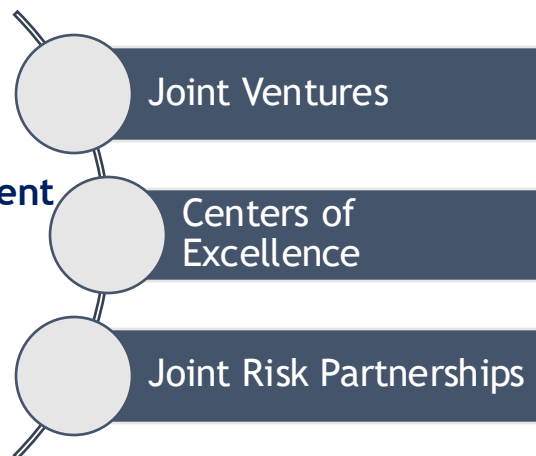
India's Technology Ecosystem

Service Providers, Academia and Startups: potential for collaboration & innovation

1

Tech Service Providers

Key Engagement Models



GE opened a Digital Hub in partnership with Infosys to co-create intelligent grid solutions

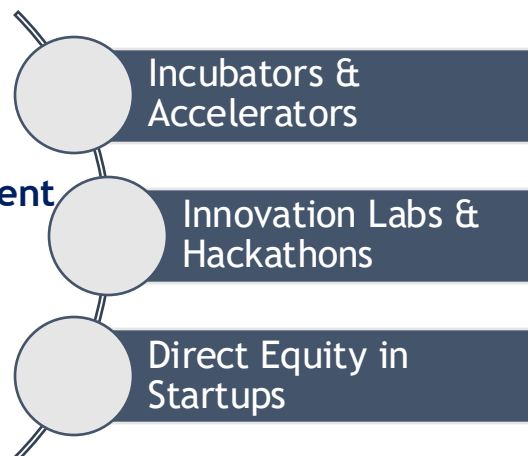


Shell started an IT center in partnership with IBM & Wipro to enhance IT project delivery

2

Startup Ecosystem

Key Engagement Models



Startup Contest: Design in India program



Acquired Rephrase.ai in 2023

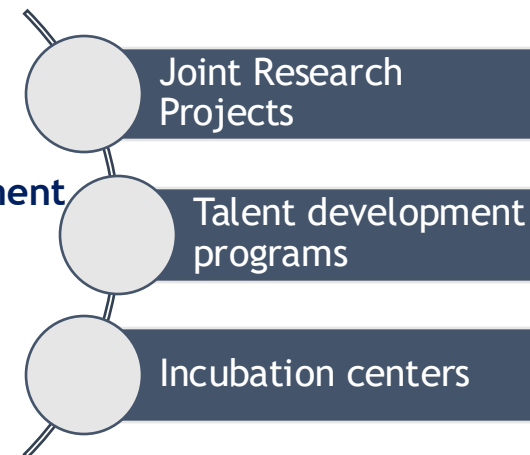


Bosch India Startup Alliance Program

3

Academia

Key Engagement Models



Joint research to develop transformational device to device communication



EmSys Lab at IIT Bombay focusing on design of complex integrated circuits



Siemens Healthineers- Computational Data Sciences (CDS) Collaborative Laboratory

Invest India helps companies enter and run in India

Created by the Indian Government to simplify and incent entry/expansion



Federal government
Ministry of Commerce & Industry

State governments

Industry trade associations
(CII, FICCI, NASSCOM)

Invest India

Investment

Trade

Technology



+



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Pre-investment

Investment execution

Post-investment

Invest India helps companies enter and run in India

Created by the Indian Government to simplify and incent entry/expansion



Investment Lifecycle

How Can Invest India Help?

Expansion

- Assessment of new Tier 1/Tier 2 cities for expansion
- Government/Private owned office spaces

Strategic Partnership

- Identification of strategic partners across startup ecosystem, tech industry and academia
- Facilitation of partnership discussions

Operation

- Issue Resolution
- Policy Advocacy

Thank You



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