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25 / სექტემბერი / **2017** წ.

ჯანმრთელობის დაცვის დეპარტამენტის უფროსს
ქალბატონ მარინა დარახველიძეს

ქალბატონო მარინა,

გიგზავნით საქართველოს საგარეო საქმეთა სამინისტროს 2017 წლის 22 სექტემბრის №01/34673 წერილს ინდოეთის კომერციისა და მრეწველობის სამინისტროს სერვისების ექსპორტის ხელშეწყობის საბჭოს თანდართულ ნოტასთან ერთად, რომელიც ეხება მიმდინარე წლის 12-14 ოქტომბერს, ინდოეთში ქ. ბენგალურუში ჯანდაცვის საკითხებისადმი მიძღვნილ საერთაშორისო გამოფენაში (SEPC-MART) მონაწილეობის საკითხს.

ინდური მხარე მზადყოფნას გამოთქვამს, ქართულ მხარეს ბენგალურუს საერთაშორისო საგამოფენო ცენტრში გამოუყოს შესაბამისი ფართი (9კვ.მ) და აანაზღაუროს ორი წარმომადგენლის მგზავრობისა და სასტუმროს ხარჯები.

გთხოვთ, განიხილოთ თანდართული წერილი და უზრუნველყოთ ინფორმაციის მიწოდება შესაბამისი ორგანიზაციებისათვის.

პატივისცემით,

ადამიანური რესურსების მართვისა და საერთაშორისო ურთიერთობების დეპარტამენტის უფროსი, პირველადი სტრუქტურული ერთეულის ხელმძღვანელი

ს. ბელქანია

სოფიკო ბელქანია

საქართველო

34673-01-2-201709221002

საგარეო საქმეთა სამინისტრო

№ 01/34673
22/09/2017

საქართველოს ჯანმრთელობისა და სოციალური დაცვის სამინისტროს

გაცნობებთ, რომ ინდოეთის კომერციისა და მრეწველობის სამინისტროს მიერ დაფუძნებული სერვისების ექსპორტის ხელშეწყობის საბჭოს (Services Export Promotion Council, SEPC) ორგანიზებით, ინდოეთის ქალაქ ბენგალურუში (კარნატაკას შტატი) **მ.წ. 12-14 ოქტომბერს** დაგეგმილია **ჯანდაცვის საკითხებისადმი მიძღვნილი საერთაშორისო გამოფენის (SEPC-MART) გამართვა.**

ინდური მხარე იწვევა ქართულ მხარეს მონაწილეობა მიიღოს ზემოაღნიშნულ ღონისძიებაში. ამასთან, მიმწვევი მხარე გამოთქვამს მზადყოფნას, ქართული მხარეს ბენგალურუს საერთაშორისო საგამოფენო ცენტრში გამოუყოს შესაბამისი ფართი (9 კვ მ), ასევე დაფაროს 2 წარმომადგენლის ავიაბილეთის და სასტუმროს ხარჯები.

გიგზავნით სერვისების ექსპორტის ხელშეწყობის საბჭოდან მიღებულ წერილს და თანდართულ მასალას.

გთხოვთ, განიხილოთ ხსენებული საკითხი, მიაწოდოთ ინფორმაცია დაგეგმილი ღონისძიების შესახებ დაინტერესებულ უწყებებსა და კომპანიებს და შეძლებისდაგვარად მოკლე ვადაში გვაცნობოთ აღნიშნულ გამოფენაში საქართველოს მხრიდან მონაწილეთა შესახებ, შემდგომში ინდური მხარის ინფორმირების მიზნით.

დანართი: 24 გვერდი.

პატივისცემით, ,
დავით კერესელიძე

დეპარტამენტის დირექტორი

აზიისა და ოკეანეთის ქვეყნების დეპარტამენტი

SEPC
SERVICES EXPORT PROMOTION COUNCIL

Jyoti Kaur
Deputy Director General
9910169994

SERVICES EXPORT PROMOTION COUNCIL
(Set up by Ministry of Commerce and Industry, Government of India)

6A/6, NCHF Building, 3rd Floor, Siri Fort
Institutional Area, August Kranti Marg,
New Delhi 110049 (India)

Tel: +91 11 4604 6309
Email: jyoti.sepc@gmail.com

www.servicesepc.org
www.indiahealthcaretourism.com

SEPC
SERVICES EXPORT PROMOTION COUNCIL

Sangeeta Godbole, I.R.S.
Director General
SERVICES EXPORT PROMOTION COUNCIL
(Set up by Ministry of Commerce and Industry, Government of India)
सेवा निर्यात संवर्धन परिषद
(वाणिज्य एवं उद्योग मंत्रालय भारत सरकार द्वारा स्थापित)

EMBASSY OF GEORGIA, NEW DELHI
№ 37826/30
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24 გვ.

H.E. Archil Dzuliashvili
Ambassador
Embassy of Georgia
169 Jor Bagh
New Delhi
110003

New Delhi, Dated 01st September, 2017

Re: Invitation for Participating in "SEPC MART", as part of ADVANTAGE HEALTHCARE INDIA from 12th – 14th Oct., 2017, at Bengaluru International Exhibition Centre

Dear Excellency,

Greetings from Services Export Promotion Council (SEPC), INDIA !

We are an apex Export Promotion Council set up by the Dept of Commerce, Ministry of Commerce & Industry, Government of India, to promote, encourage and provide guidance to the services exports sector.

2. "India Heals" and hopes to provide affordable and appropriate Healthcare to every single individual on this planet. As a part of this effort, SEPC is setting-up a "SEPC MART" from 12th-14th Oct 2017 at Bengaluru International Exhibition Centre, Bengaluru, India as part of ADVANTAGE HEALTHCARE INDIA. SEPC MART is event will serve as a platform to enhance strategic cooperation and develop synergies between Indian industry in the Healthcare and Tourism sectors with partnering countries. These sectors have synergised into Medical Tourism, which has shown tremendous growth in the past few years.

3. Owing to the significance of strong cultural and economic ties with Georgia, and in order to strengthen them further, we request you kindly disseminate the information about this event to the head of the Ministry of Health, leading hospitals of Georgia and the leading Medical Value Travel companies to actively participate in the SEPC Mart at ADVANTAGE HEALTHCARE INDIA.

4. We will be happy to provide your Embassy a complimentary dedicated 9 sqr mtr. booth space in our pavilion. We will be happy to provide two delegates from Georgia complimentary economy return air tickets and accommodation for 3 nights. The B2B meetings with participants can be held in this booth wherein the hosted delegate is to report on all the three days. Each invited delegate must conduct at least 50 meetings with participating industry such as Indian Hospitals, clinics, medical device manufacturers and officials. This interaction shall go a long way in enabling affordable quality healthcare to

6A/6, NCHF Building, 3rd Floor, Siri Fort Institutional Area, August Kranti Marg, New Delhi 110049 (India)
Tel: +91 11 4104 6327-28-29, +91 11 4173 4632 | Web: www.servicesepc.org |Email: services.epc@gmail.com

citizens of Georgia . It will also establishing new and strengthen existing commercial ties between our two countries.

5. I would request you to kindly coordinate with Ms. Jyoti Kaur, Deputy Director General, SEPC at jyoti.sepc@gmail.com to nominate, in attached format, one senior official from the Ministry of Health responsible for hospitals and patients movement and one leading hospital CEO from Georgia. An early confirmation will enable us to arrange the Ticketing and Accommodation

With warm regards,

Yours Sincerely,

Sangeeta Godbole

Services Export Promotion Council

Setup by Ministry of Commerce & Industry, Govt. of India
Third Floor NCHF Building, 6A/6, Siri Fort Institutional Area,
August Kranti Marg, New Delhi – 110049
E-mail: services.epc@gmail.com, Website: www.servicesepc.org
Phone: +91 11-41046327-28-29, +91 11-41734632

Nomination for Participation in SEPC MART at ADVANTAGE HEALTH CARE INDIA 2017

a) Name of the delegate (as per passport):

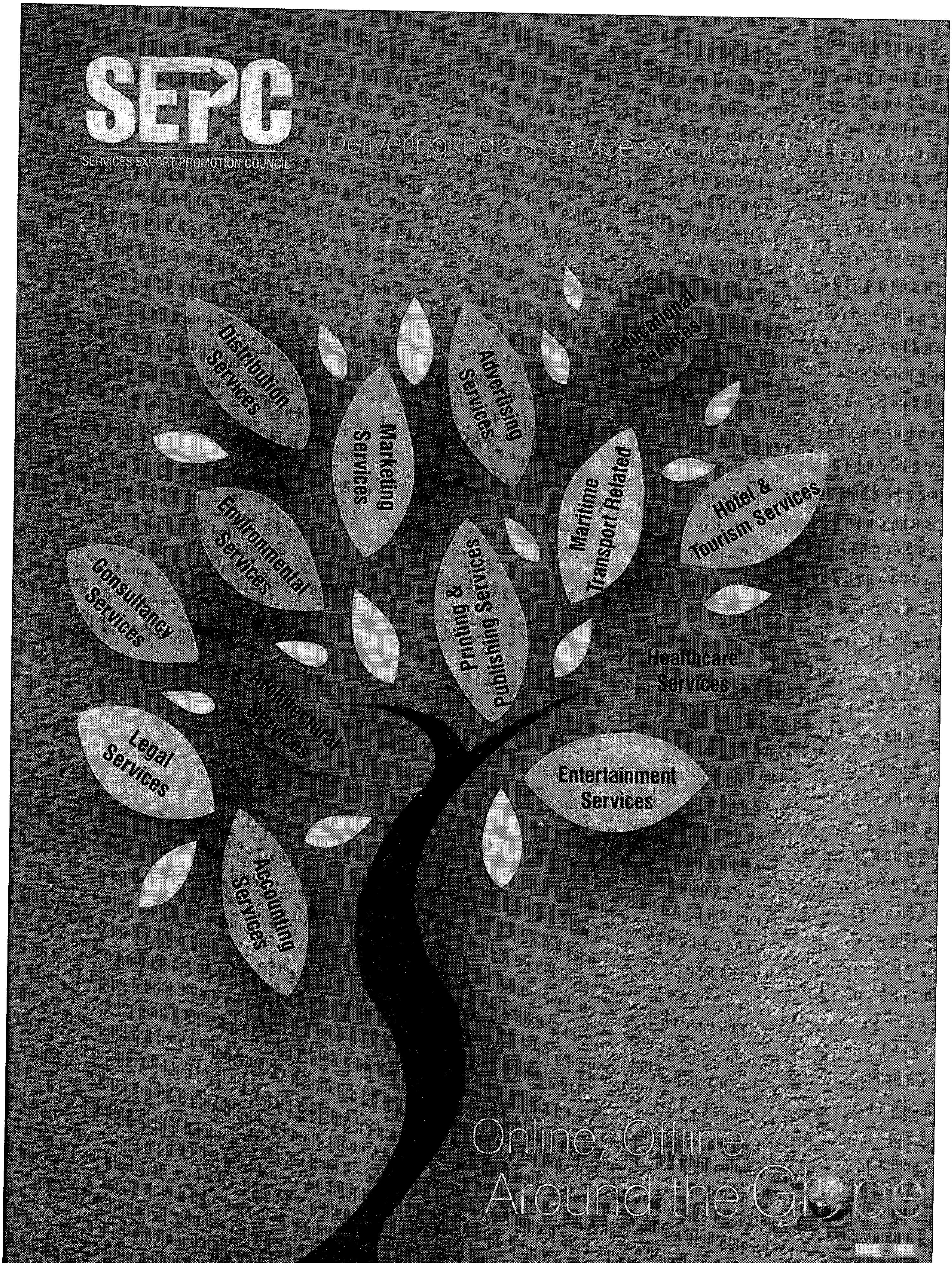
b) Designation and Company Name:

b) Contact Info. (Address, Landline No. and Mobile No.):

c) Passport no., date of issue, date of expiry (with Scanned copy of the passport attached):

d) Visa number (If available):

Signature of the Delegate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Delivering India's service excellence to the world
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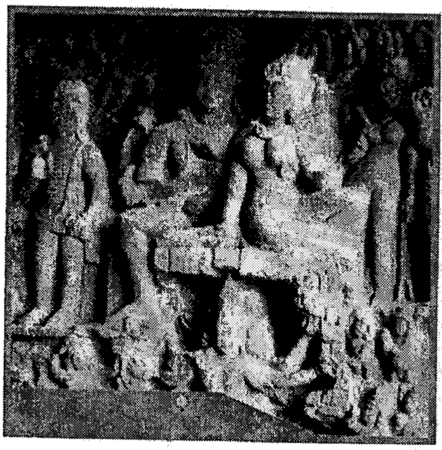
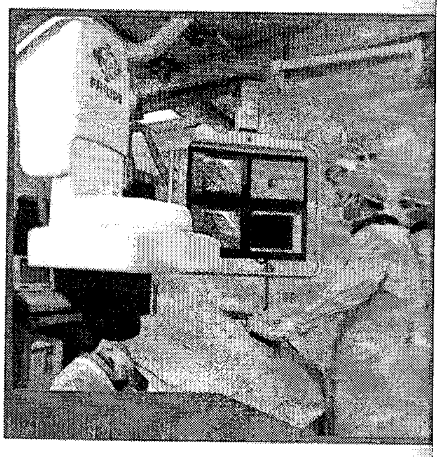
  

Service Sectors in India

Services Sector is playing role in the growth of Indian economy and employment generation. Over the years, Services Exports has constantly been giving trade surplus for India. In fact, WTO ranked India as 6th largest exporter (3.3% of world exports) and 7th largest importer (3.1% of the world imports), in commercial services trade.

India's services sector has always served the country's economy well, accounting for about 57 per cent of the gross domestic product (GDP). Among the world's top 15 countries in terms of GDP, India ranked 10th in terms of overall GDP and 12th in terms of services GDP in 2012. Service exports have recorded about eight folds increase in 12 years from US$ 20.76 billion to US$ 155.44 billion (approx.) in 2014-15.

In terms of FDI inflow, Indian services sector has attracted the highest amount of FDI equity inflows in the period April 2000-December 2014, amounting to about US$ 41,755.46 million which is about 18 per cent of the total foreign inflows.

About SEPC

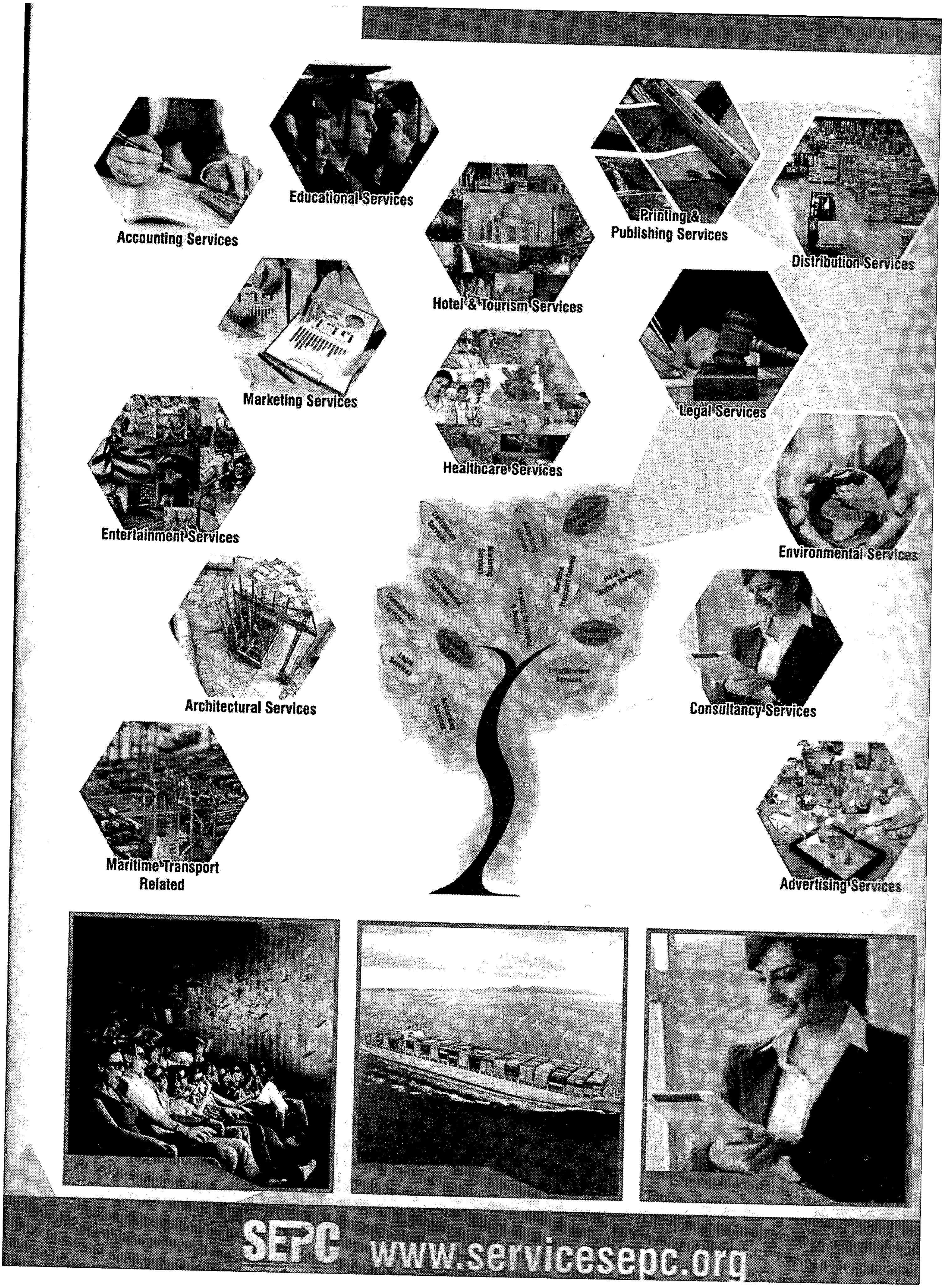
Ministry of Commerce and Industry, Government of India, with a view to give proper direction, guidance and encouragement to the services sector, has set up an exclusive Export Promotion Council for Services in the name of Services Export Promotion Council (SEPC). The Council was registered under the Societies Registration Act in November 2006. DGFT, vide Gazette Notification dated 05/03/2007, included SEPC in the list of recognized Export Promotion Councils. The Council has completed 8 years of its existence and got a strong membership base of more than 2200 members from its 14 services sectors which comes under the purview of SEPC. The Management of SEPC vest with Central Governing Council elected by members.

How SEPC helps

Benefits of getting Registration Cum Membership Certificate (RCMC) from SEPC:

- It helps Indian service exporter to find new markets for export of services.
- Provides assistance on various Government Export Promotion Schemes/Foreign Trade Policy
- Participates in seminars/exhibitions /trade fairs /buyers-seller meets at national and International level.
- RCMC is required for export incentives & import licenses.
- Making comprehensive list of service providers in India in different fields which helps overseas buyers in locating service providers for their requirement.
- Taking up issues of the exporters with the Government bodies.

After obtaining RCMC one can get benefit of various Export Promotion Schemes like EPCG, SEIS, MDA & MAI and recognition as status holder.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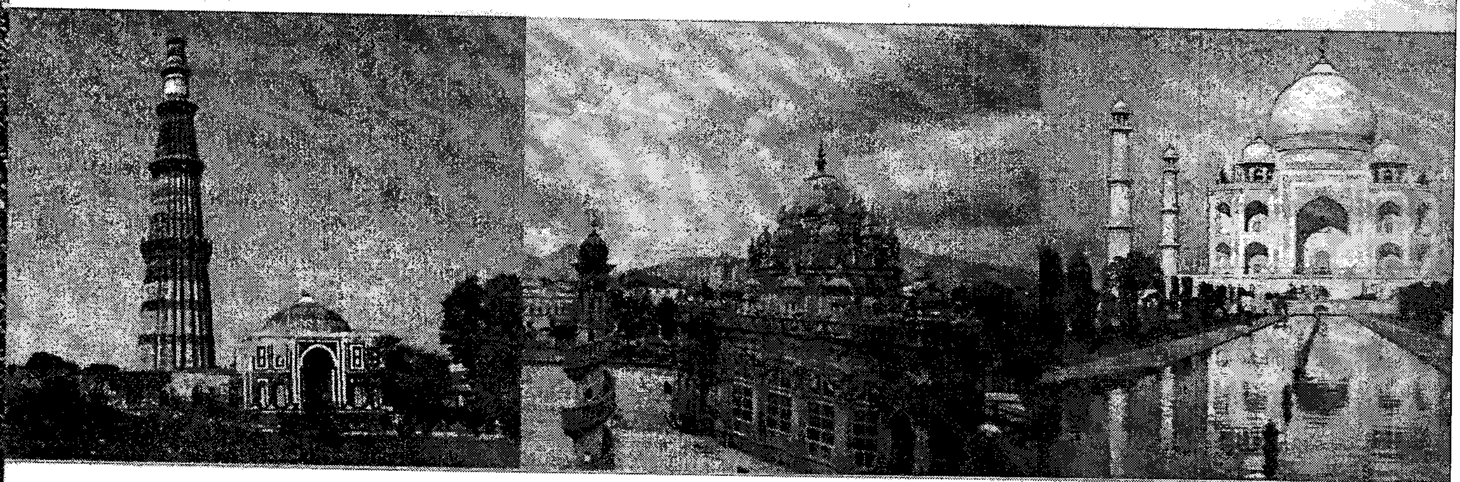

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Consultancy Services

Introduction

The consulting profession in India is quite young as compared to most developed countries and is still going through a growth phase. After Independence, the Government had focused on investment in core industrial sectors and on infrastructure development. The investment in these sectors attracted various construction and engineering companies to explore business opportunities and contribute their expertise in these sectors. Domain experts were required who could use their skill and competence to design and build industries, dams, roads, buildings, etc.

Over the years, with growth in economic and industrial development, the Indian consulting industry also started expanding, not only in terms of size, but also in terms of service offerings.

The nature of consultancy services varies in its content and extent. The Reserve Bank of India has classified management and engineering services under 'Other Business Services' as per WTO classification. Since the origin of consultancy, firms have been characterized by functional areas such as engineering, accounting, law, or banking. Consulting organizations are generally classified as management consultancy organizations, engineering consultancy organizations and 'Others' which include legal consultancy organizations, socio-economic consultancy organizations and financial consultancy organizations. Clients are broadly classified into different categories i.e. Government institutions, funding agencies (Bilateral Agencies and Multilateral Agencies), corporate clients and others like Non Government organizations.

- The rate of reward under SEIS would be based on net foreign exchange earned. The reward issued as duty credit scrip, would no longer be with actual user condition and will no longer be restricted to usage for specified types of goods but be freely transferable and usable for all types of goods and service tax debits on procurement of services/goods. Debits would be eligible for CENVAT credit or drawback.
- The present rates of reward are 3% and 5%.

Market Development Assistance (MDA) & Market Access Initiative (MAI) Schemes

These Schemes are administered by Ministry of Commerce & Industry for the promotion of exports including services exports.

Market Development Scheme (MDA) : In view of the prevailing macro-economic situation with emphasis on exports and to facilitate various measures being undertaken to stimulate and diversify the country's export trade, MDA Scheme is to support the under mentioned activities:

(i) Assist exporters for export promotion activities abroad

(ii) Assist Export Promotion Councils (EPCs) to undertake export promotion activities for their product(s) and commodities

(iii) Assist approved organizations/trade bodies in undertaking exclusive nonrecurring innovative activities connected with export promotion efforts for their members

(iv) Assist Focus export promotion programmes in specific regions abroad like FOCUS (LAC), Focus (Africa), Focus (CIS) and Focus (ASEAN + 2) programmes.

(v) Residual essential activities connected with marketing promotion efforts abroad

Market Access Initiatives (MAI):

Market Access Initiative (MAI) Scheme is an Export Promotion Scheme envisaged to act as a catalyst to promote India's exports on a sustained basis. The scheme is formulated on focus product-focus country approach to evolve specific market and specific product through market studies/survey. Assistance would be provided to Export Promotion Organizations/Trade Promotion Organizations/National Level Institutions/Research Institutions/Universities/Laboratories, Exporters etc., for enhancement of exports through accessing new markets or through increasing the share in the existing markets.

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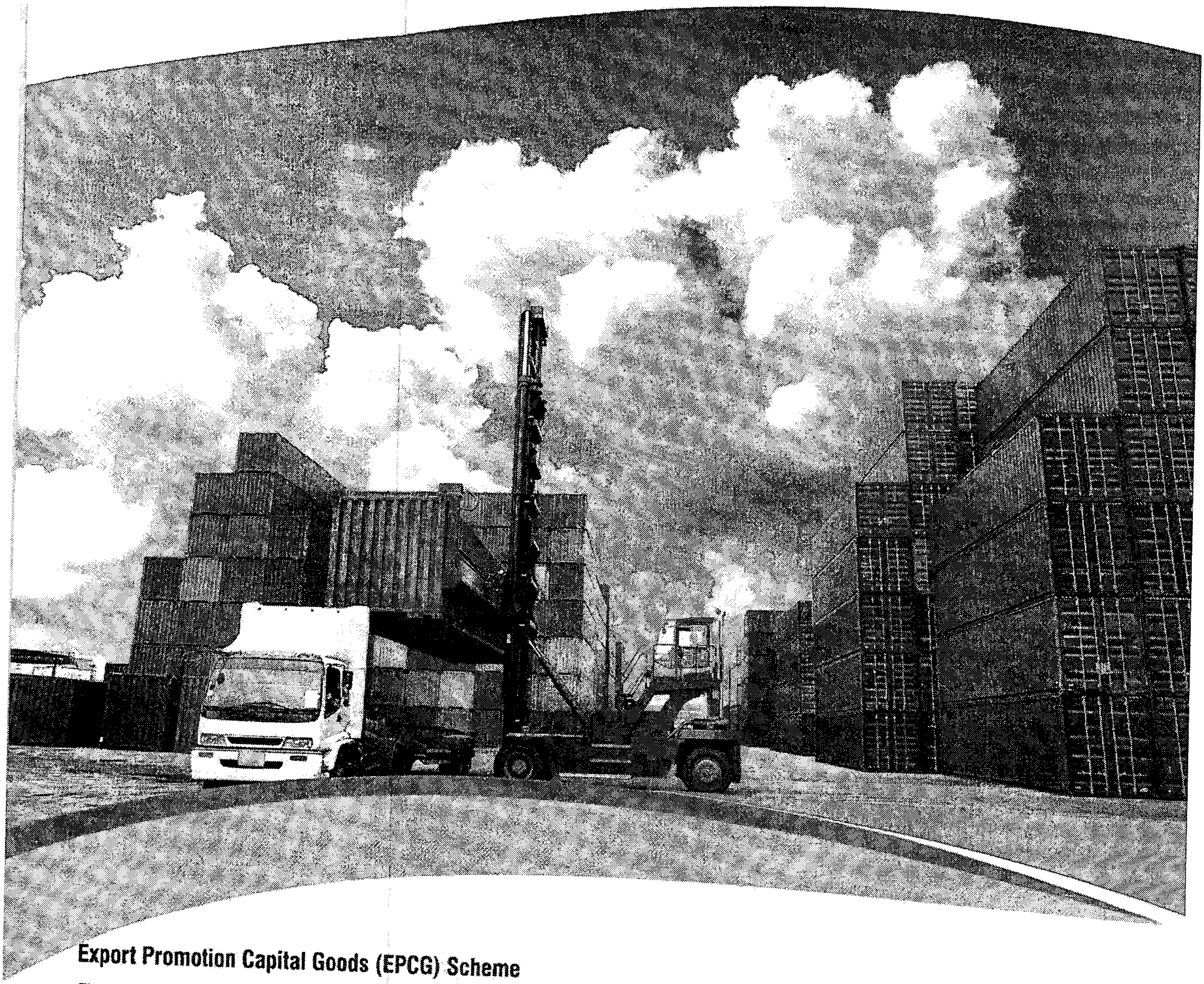
EXPORT PROMOTIONAL SCHEMES



Export Promotion Capital Goods (EPCG) Scheme

The Export Promotion Capital Goods (EPCG) scheme was one of the several export-promotion initiatives launched by the Government of India. The basic purpose of the scheme was to allow exporters to import machinery and equipment at affordable prices so that they can produce quality goods and services to enhance India's export competitiveness.

EPCG Scheme allows import of capital goods for preproduction, production and post-production at Zero customs duty. EPCG scheme covers manufacturer exporters with or without supporting manufacturer(s), merchant exporters tied to supporting manufacturer(s) and service providers.

Services Exports from India Scheme (SEIS)

- Served from India Scheme (SFIS) has been replaced with Service Exports from India Scheme (SEIS). SEIS shall apply to `Service Providers' located in India' instead of `Indian Service Providers'. Thus SEIS provides for rewards to all Service providers of notified services, who are providing services from India, regardless of the constitution or profile of the service provider.

Key Statistics

The 12 state-owned ports (Kolkata, Paradip, Visakhapatnam, Ennore, Chennai, Tuticorin, Kochi, New Mangalore, Mormugao, Kandla, Mumbai and Navi Mumbai) which look after about 58 per cent of India's external trade by volume shipped by sea, handled a combined 555.50 MT of various commodities such as crude oil, petroleum products, iron ore, coal, container cargo and fertilisers in 2013–14 as compared to 545.79 MT the previous year, registering a growth of 1.78 per cent, according to Indian Ports Association (IPA).

Kandla port, Gujarat was India's biggest State-owned cargo handler by volume for the seventh year in a row, handling 87 MT of cargo in 2013–14. During the year, Ennore port, Tamil Nadu also posted robust volume growth of around 55 per cent at 22.12 MT as compared with 14.2 MT a year earlier, on the back of strong coal shipments.

The Indian ports sector received foreign direct investment (FDI) worth US$ 1,635.40 million between April 2000 and January 2014, according to the Department of Industrial Policy and Promotion (DIPP), Ministry of Commerce and Industry.

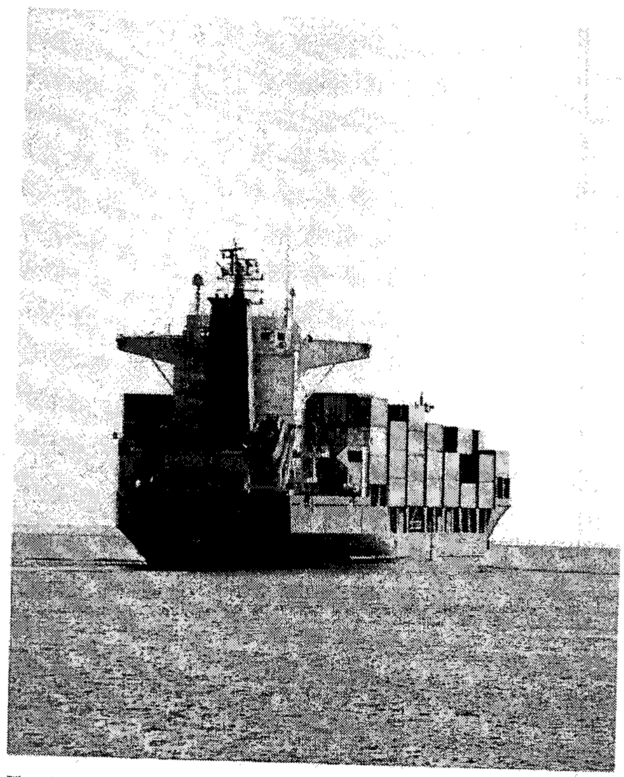
Recent Developments

- Adani Port has emerged as the highest bidder to build a container terminal at the Ennore Port. While Adani will invest US$ 211.11 million to build the terminal, Ennore Port will invest around US$ 33.25 million on deepening the berth and providing rail connectivity.
- The proposed US$ 847.88 million international deepwater multipurpose project at Vizhinjam, Thiruvananthapuram, has received five bids from international and national companies for the global tender floated Vizhinjam International Seaport Ltd for the development and operation of the port.
- Ennore Port Ltd (EPL), Chennai and Ford India Pvt Ltd have signed an agreement for export of Ford cars for a period of 10 years. The agreement provides for various volume-based discounts on wharfage by EPL ranging from 5–30 per cent, to encourage more exports through EPL.
- Clocking the fastest growth in cargo handling, Mundra Port, the flagship port of Adani Ports and SEZ Ltd (APSEZ) has registered 100 million metric tonnes (MMT) of cargo handling during 2013–14, the highest by any commercial port in India. The port has the capacity to handle over 200 MT of cargo per annum.

Government Initiatives

The Government of India has allowed 100 per cent FDI under the automatic route for port development projects. A 10-year tax holiday has been given to enterprises engaged in the business of developing, maintaining and operating ports, inland waterways and inland ports.

Twenty-three projects out of the targeted 30 projects for 2013-14 involving a total capacity addition of 116 MT were awarded up to mid-February, according to credit rating agency ICRA.



The Cabinet Committee on Economic Affairs (CCEA) has approved five projects involving an investment of over US$ 2.93 billion to increase the capacity of major ports. Of the five projects approved, four are container terminals and one is a multi-purpose cargo berth project in Mumbai port.

The Maritime Agenda 2010–2020 is an initiative of the Ministry of Shipping to outline the framework for the development of the port sector. The agenda also suggests policy-related initiatives to improve the operating efficiency and competitiveness of Indian ports.

The Road Ahead

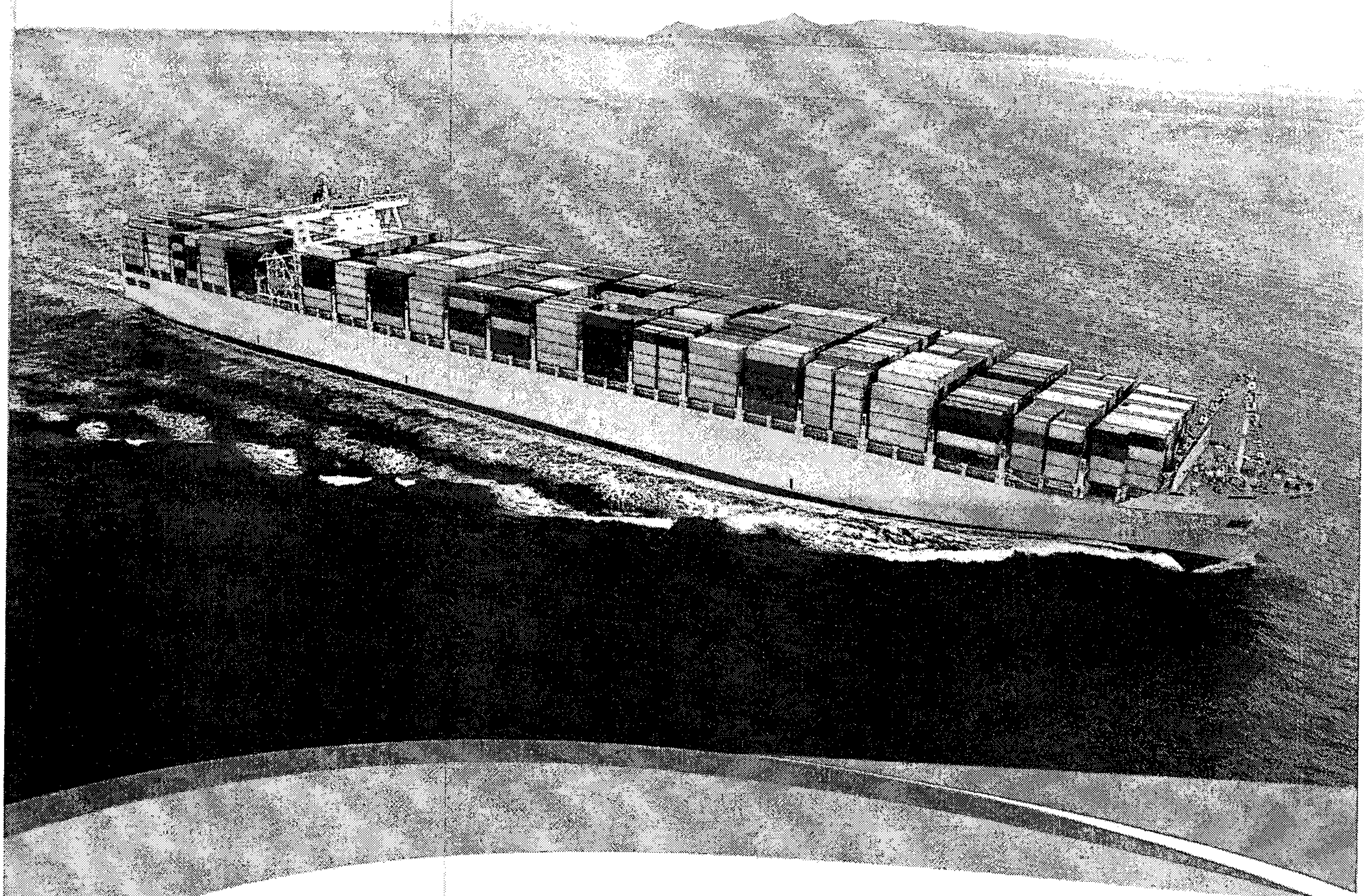
With rising demand for port infrastructure due to growing imports (crude, coal) and containerization, it will be difficult for public ports to meet demand. This provides private ports with an opportunity to serve the spill-off demand from major ports and increase their capacities in line with forecasted new demand.

The Ministry of Shipping through its Maritime Agenda 2010-2020 has set a target capacity of over 3,130 MT by 2020, largely through private sector participation. More than 50 per cent of this capacity is expected to be created at non-major ports.

Given the positive outlook for cargo traffic, and the resulting increase in number of vessels visiting ports, demand for ship repair services will also go up. This will provide opportunities to build new dry docks and set up ancillary repair facilities. The planning Commission of India in its 12th Five Year Plan expects a total investment of US$ 30.01 billion in the ports sector.

SERVICES EXPORT PROMOTION COUNCIL

Maritime Transport Related

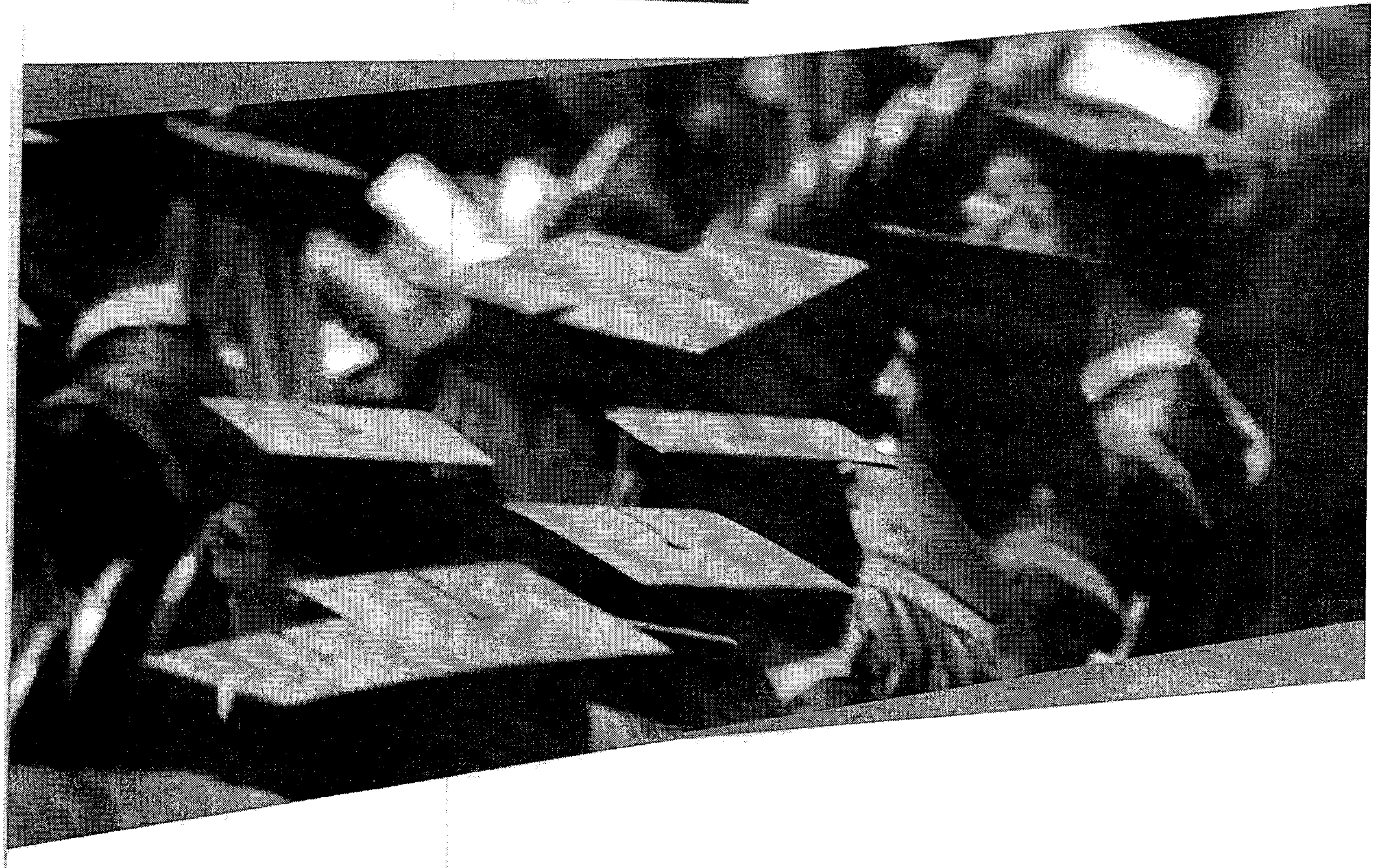


Introduction

The ports and shipping industry plays a pivotal role in sustaining growth in trade and commerce and the overall development of the Indian economy. India currently ranks 16th among the maritime countries, having a long coastline of about 7,517 kilometres (km) with 13 major ports (12 government and one corporate) and about 200 non-major ports currently operating on the western and eastern coasts of the country. These ports serve as the gateways to India's international trade by sea, handling over 90 per cent of foreign trade.

During April–December 2013, Indian major ports handled 413.01 million tonnes (MT) of cargo as compared to 405.28 MT over the corresponding period in 2012, registering a growth of 1.91 per cent. The state governments have realized the strong growth potential and the increasing need for robust port infrastructure, and have consequently provided sops and a favorable investment climate which are attracting investments from private players into the sector.

The capacity of ports in India by the end of the 12th Five Year Plan is targeted to increase to 2,493.10 million tonnes per annum (MTPA) as compared to 1,245.30 MTPA at the end of the 11th Five Year Plan.



Further, according to the report '40 million by 2020: Preparing for a new paradigm in Indian Higher Education' released by Ernst & Young, the higher education sector in India is expected to witness a growth of 18 per cent CAGR till 2020. At present, the sector witnesses spends of more than US$ 7.68 billion, which is estimated to grow over US$ 38.69 billion in 10 years.

Investments

The education sector in India is considered as one of the major areas for investments as the sector is going through a strong phase of revolution, according to a report 'Emerging Opportunities for Private and Foreign Participants in Higher Education' by PricewaterhouseCoopers (PwC).

The sector has attracted foreign direct investments (FDI) worth US$ 788.43 million during April 2000 to September 2013, according to the data released by the Department of Industrial Policy and Promotion (DIPP).

FDI Inflow

The education sector has attracted foreign direct investments (FDI) worth US$ 552.09 million during April 2000 to March 2013, according to the data released by the Department of Industrial Policy and Promotion (DIPP).

Government Initiatives

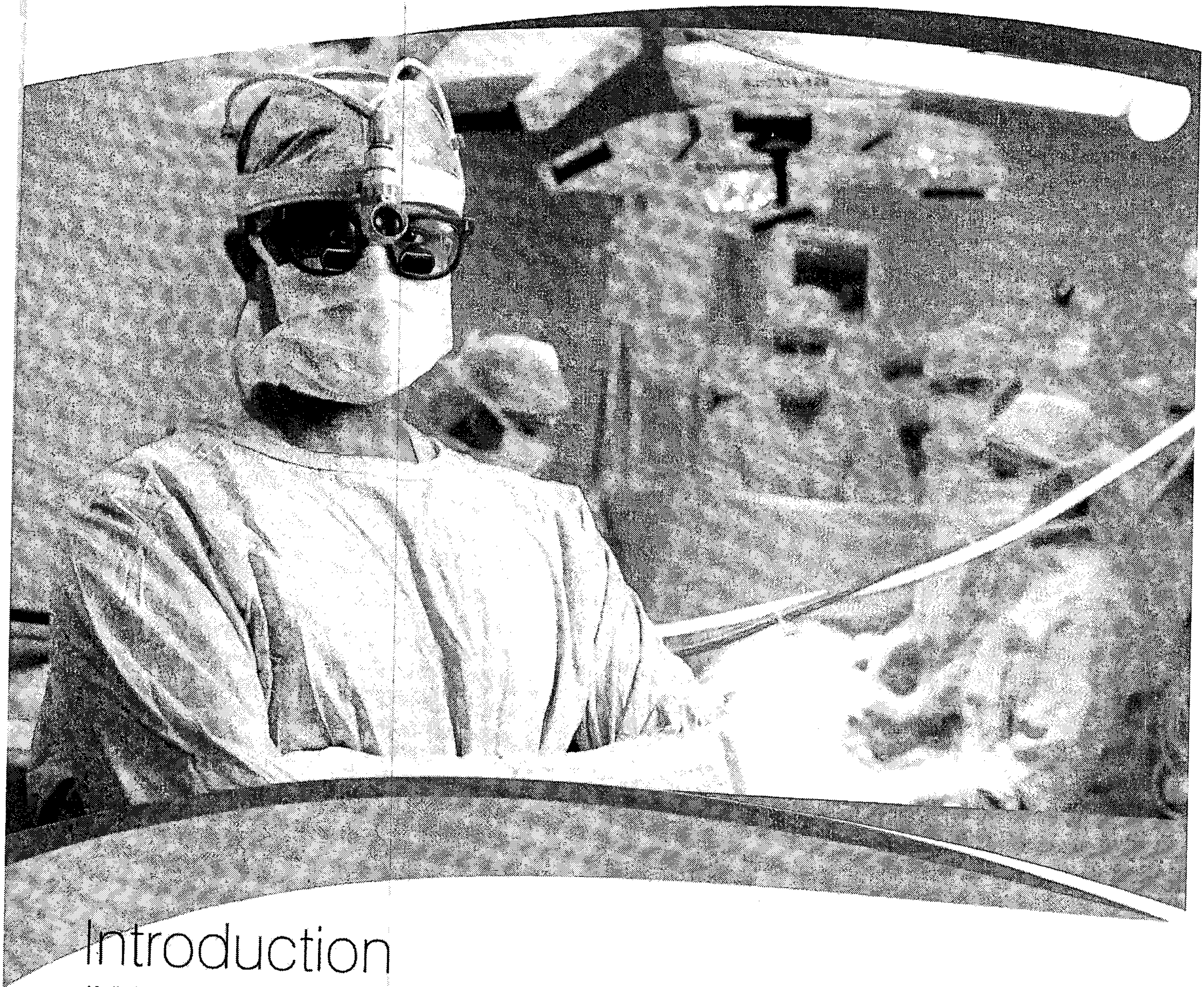
Government support for the sector has also seen a boost, with substantial reforms and increased financial outlays being announced and implemented. These reforms aim at not only strengthening the sector but facilitating planned expansion of the sector.

The following are some of the major initiatives taken by the government for education sector:

- The Government of India and the Government of the United States (US) have identified eight joint projects worth US$ 250,000 each in the education sector.
- The Department of Space/ Indian Space Research Organisation (ISRO) has established an endowed fellowship at the Graduate Aerospace Laboratories of the California Institute of Technology, California, USA.
- Under the Union Budget 2013-14, the Government of India allocated:
  - US$ 4.52 billion to Sarva Shiksha Abhiyaan (SSA)
  - US$ 10.94 billion to the Ministry of Human Resource Development, an increase of 17 per cent over the RE of the current year
  - US$ 877.91 to Ministries/Departments for scholarships to students belonging to scheduled castes (SC), scheduled tribes (ST), other backward classes (OBC), minorities and girl children
  - US$ 26.58 million to the corpus of Maulana Azad Education Foundation to raise its corpus to US$ 249.21 million during 12th Plan period
  - US$ 785.37 million for medical education, training and research

SERVICES EXPORT PROMOTION COUNCIL

Healthcare Services



Introduction

Medical tourism also referred as medical travel, health tourism or global healthcare is a term used to describe the rapidly-growing practice of traveling across international borders to seek healthcare services. Health Tourism includes segments such as multi-specialty hospitals, ayurveda, holistic medicine centres and health spas; adventure tourism and ecotourism providers.

Medical tourism is a booming phenomenon in countries like India. Medical tourists choose India as their favorable destination because of the key opportunities in Indian healthcare sector in the form of efficient infrastructure and technology.

Majority of these tourists came to Indian shores seeking liver transplant, heart surgeries like bypass or pacemaker, bone marrow transplant, hip replacement, knee replacement, eye surgeries, etc. Indian expertise in conducting these surgeries with most advanced technology is at par or sometimes even beyond comparison with its American or European counterparts.

Medical tourists visiting India are anticipated to touch 3,200,000 by 2015 and medical tourism is expected to grow at an annual rate of 30 per cent till 2015.

India's decision to offer visa-on-arrival to citizens of 180 countries will be a boom for the medical tourism industry in the country, as per Mr Ajay Bisaria, Joint Secretary of the Eurasia Division of the Indian External Affairs Ministry.

Apollo Health City, Hyderabad has been bestowed the prestigious 'International Medical Tourism Award' for excellence in customer service, by the reputed International Medical Travel Journal, UK, at a ceremony at JW Marriott Hotel in Dubai on March 12, 2014.

Health tourism is gaining momentum in India. The health tourism industry in India could become a US$ 5 billion business by 2015, as per a McKinsey study.

Market Size

Medical Tourism sector expected to experience annual growth rate of 20-25%, making it a US$ 1575.4 Million industry by 2015. Strong Presence of Private Sector accounts for more than 80% of market.

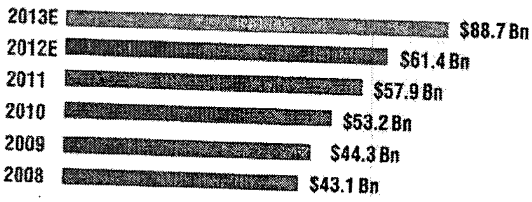
Foreign tourist arrivals (FTA) during the Month of August 2013 stood at 0.474 Million as compared to FTAs of 0.446 Million during August 2012.

Indian healthcare industry (Hospitals, medical infrastructure, medical devices, clinical trials, outsourcing telemedicine, health insurance etc.) is expected to reach US$ 160 billion by 2017, as per Frost & Sullivan. Health tourism industry in India could become a US$ 5 billion business by 2015.

Latest update : March, 2014

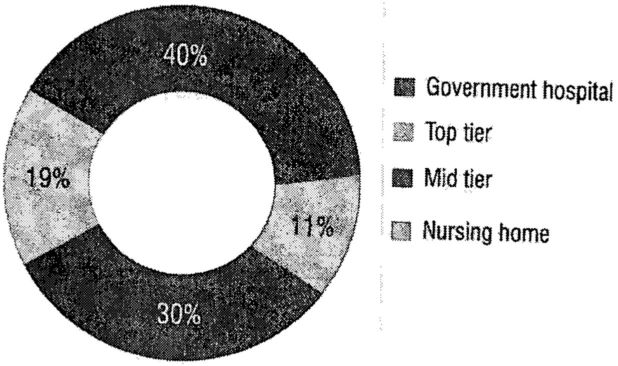
Per-Capita Expenditure

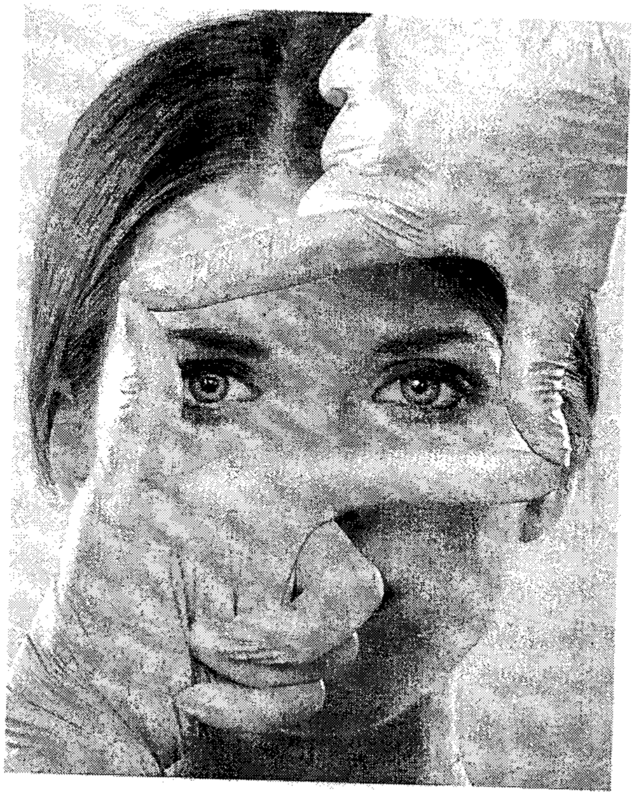
Per capita healthcare expenditure increased at a CAGR of 10.3 per cent during 2008-11.



Investments

Private sector's share in hospitals and hospital beds is estimated at 74 per cent and 40 per cent, respectively.





FDI Inflow

The hospital and diagnostics centre in India received foreign direct investment (FDI) worth US$ 2,057.29 million, while drugs & pharmaceutical and medical & surgical appliances industry registered FDI worth US$ 11,391.03 million and US$ 720.41 million, respectively during April 2000 to September 2013, according to data provided by Department of Industrial Policy and Promotion (DIPP).

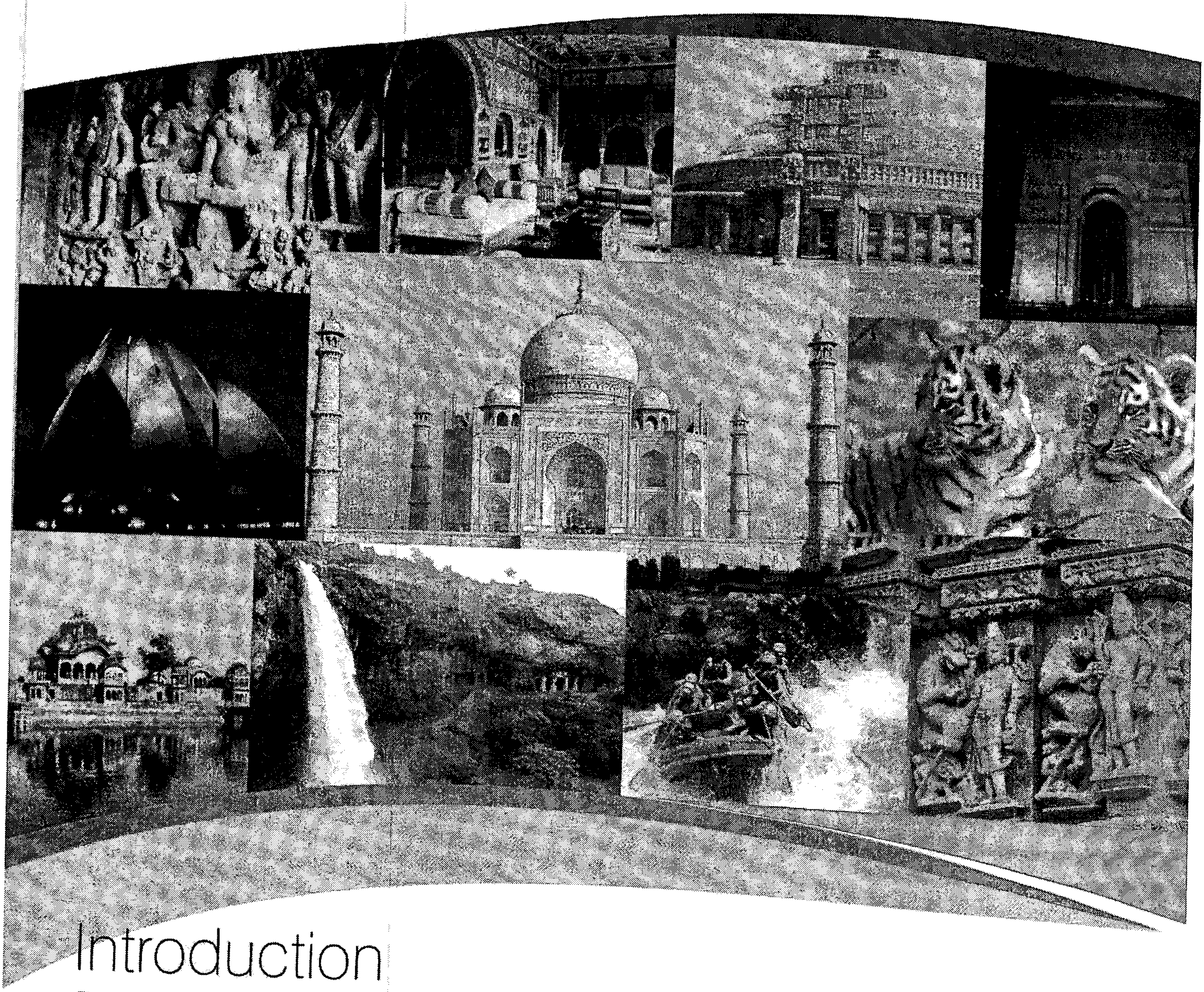
The Road Ahead

In a recent development, Government of India has allocated US$ 482.32 million in the 12th Five Year Plan (2012-17). It has found export markets in African countries, Middle East and Bangladesh.

The country has also become one of the leading destinations for high-end diagnostic services with tremendous capital investment for advanced diagnostic facilities, thus catering to a greater proportion of population. Besides, Indian medical service consumers have become more conscious towards their healthcare upkeep.

SERVICES EXPORT PROMOTION COUNCIL

Tourism & Hospitality Services



Introduction

The Indian tourism and hospitality industry has emerged as one of the key drivers of growth among the services sectors in India. Tourism in India is an employment generator and a significant source of foreign exchange for the country, apart from being an economic activity that helps local and host communities. In 2013, the travel and tourism industry contributed US$ 36 billion or 2 per cent to the country's gross domestic product (GDP). This is expected to rise to US$ 72.17 billion in 2024.

The tourism industry in India is thriving due to an increase in foreign tourist arrivals (FTA) and a greater number of Indians traveling to domestic destinations than before. The revenue from domestic tourism is likely to grow by 8.2 per cent in 2014 as compared to 5.1 per cent a year ago, according to the World Travel and Tourism Council (WTTC). Hotels are also an extremely important component of tourism industry. The Indian hospitality sector has been growing at a cumulative annual growth rate of 14 per cent every year adding significant amount of foreign exchange to the economy.

Heritage Tourism

India is a synonym of diversity and possesses the rich heritage. The perfect amalgam of religions, customs, languages and traditions is reflected in the thriving heritage of the nation. The country is a treasury of art, philosophy, architecture, classic dances, flora, fauna, music and much more. The heritage sites of one of the oldest civilizations make it a must visit place for avid travelers. The culture, encompassing of music, art, dance, festivals, customs, languages and cuisines, is the best way to understand the incredible heritage of the country. To get close to this amazing heritage, you should tour the heritage sites that will leave you with the images and the experiences that you will embellish throughout your life.

Market Size

India's travel and tourism industry is expected to grow by about 7.3 per cent in 2014, according to WTTC. The total market size of tourism and hospitality industry in India stood at US$ 117.7 billion and is anticipated to touch US$ 418.9 billion by 2022.

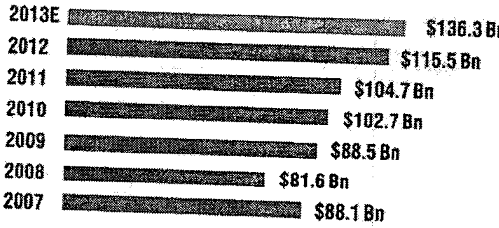
FTAs during the period January–March 2014 stood at 2.12 Million as compared to FTAs of 2.02 Million during the corresponding period of 2013, registering a growth of 4.9 per cent. FTAs during March 2014 were 0.66 Million as compared to 0.64 Million during March 2013, a growth of 4.5 per cent.

Foreign exchange earnings (FEE) during January–March 2014 stood at US$ 5.44 billion as compared to FEEs of US$ 5.02 billion during the corresponding period of 2013, registering a growth of 8.4 per cent. FEEs during March 2014 were US$ 1.70 billion.

Latest update : April, 2014

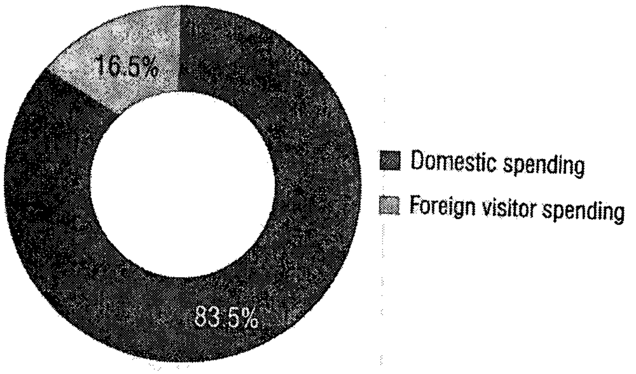
Growth

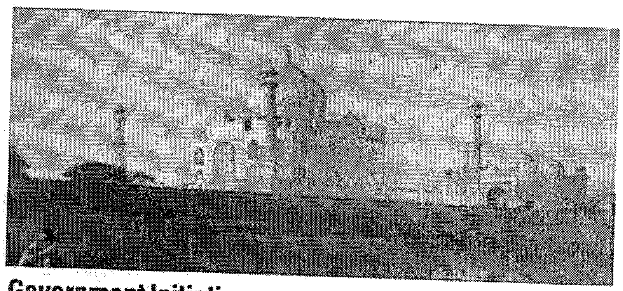
The sector's total contribution to GDP increased to US$ 115.5 billion in 2012 from US$ 88.1 billion in 2007 and is expected to reach US$ 136.3 billion in 2013.



Revenues

Foreign visitor revenues reached US$ 18.2 billion in 2012 and is projected to total US$ 34.4 billion by 2023





Government Initiatives

The Government of India has allowed 100 per cent FDI under automatic route in the hotel and tourism sector, according to the consolidated FDI Policy, released by DIPP. Aimed at liberalizing the visa regime and putting India high on the tourism map, the government is also looking at introducing electronic visa facility later this year, according to a Tourism Ministry official.

The Ministry of Tourism has launched a Campaign Clean India to sensitize all sections of society on the importance of cleanliness and hygiene in public places, particularly monuments and tourist destinations. The campaign is a blend of persuasion, education, training, demonstration and sensitization of all sections of the society.

The Ministry of Tourism has been making efforts to develop quality tourism infrastructure at tourist destinations and circuits. It has sanctioned US$ 678.54 million for a total number of 1,226 tourism projects, which includes projects related to Product/Infrastructure Development for Destination and Circuits (PIDDC), Human Resource Development (HRD), Fairs and Festivals, and Adventure and Rural Tourism for infrastructure augmentation.

The Ministry of Tourism has a Rural Tourism Scheme with the main objective of showcasing rural life, art, culture and heritage in villages, which have core competence in art and craft, handloom, textiles, natural environment, etc. Under this scheme, Central Financial Assistance (CFA) up to US$ 82,937 for infrastructure development and up to US$ 33,174 for capacity building is provided to State Governments/Union Territory Administrations for each identified site by them.

The Road Ahead

India is perceived as one of the fastest growing medical tourism destinations. According to a recent RNCOS report 'Booming Medical Tourism in India', Indian medical tourism industry is anticipated to register a compound annual growth rate (CAGR) of more than 20 per cent during 2013–15, therefore creating a huge scope for investments.

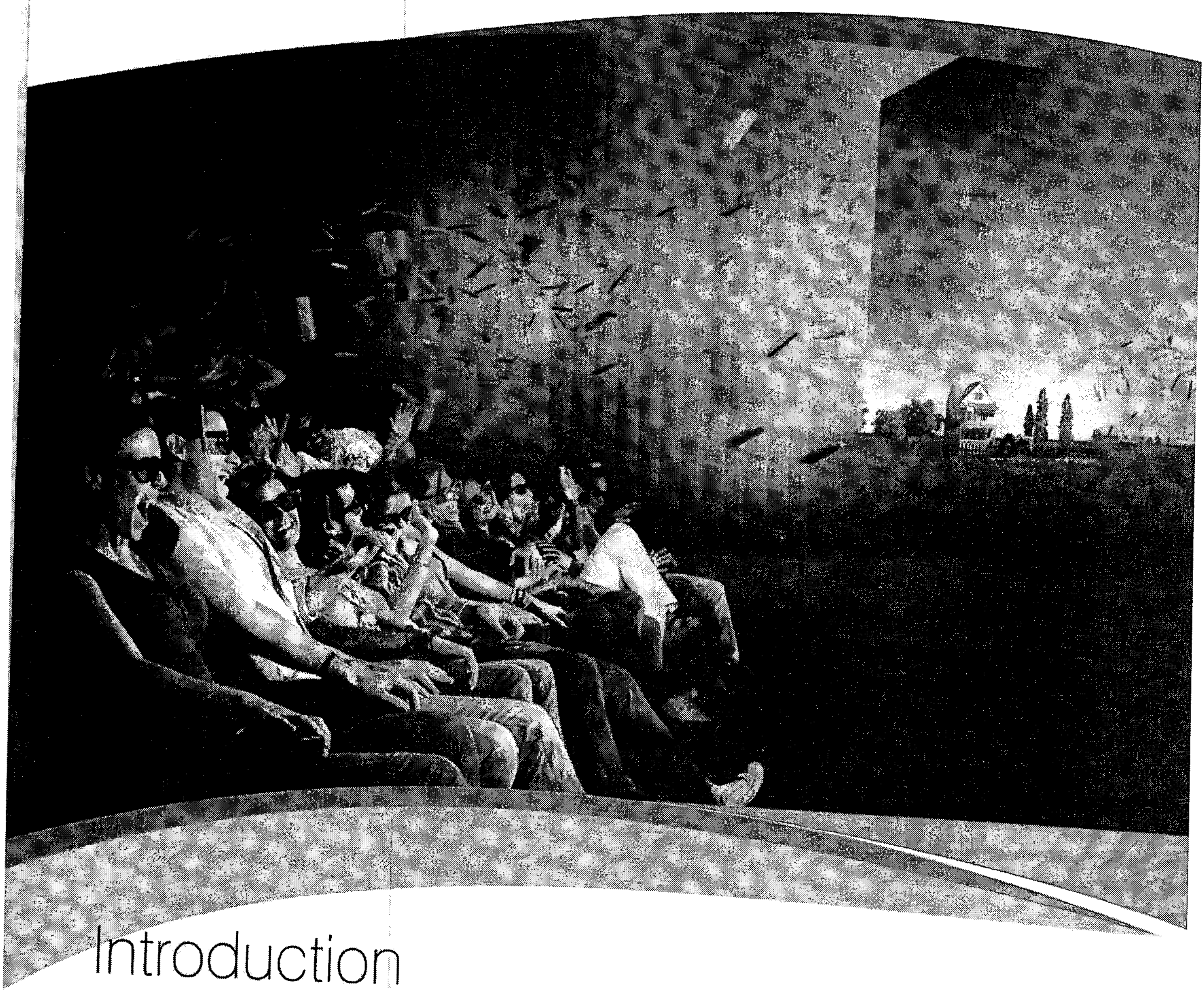
The domestic hospitality sector expects 52,000 new hotel rooms to be added in five years (2013–17), according to a survey by real estate consultancy, Cushman & Wakefield. This will lead to a rise of over 65 per cent in total hotel inventory in India. The National Capital Region (NCR) is expected to contribute around one-third to the total expected hotel rooms supply during the period.

Further, the Working Group on Tourism for the 12th Five-Year Plan, set up by the Planning Commission, has estimated the generation of additional employment of 24.5 million (direct and indirect) in the sector during 2010–16.

SEPC

SERVICES EXPORT PROMOTION COUNCIL

Entertainment Services



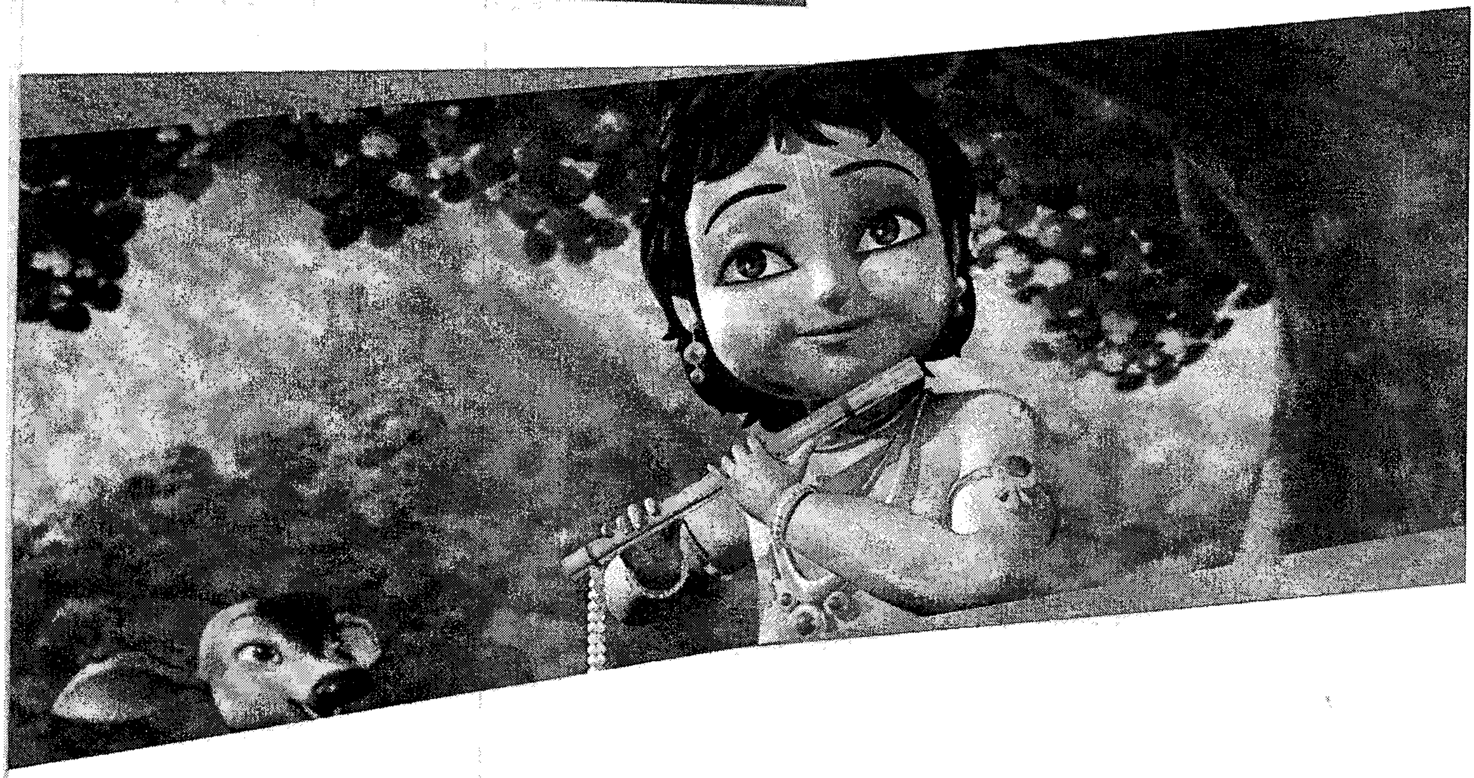
Introduction

The Indian Media and Entertainment (M&E) Industry is one of the most vibrant industries in the world and has a significant impact on the Indian economy. The sector is expected to grow at a compound annual growth rate (CAGR) of 14.2 per cent over 2013–18, by which time it is projected to become US$ 29.51 billion industry. The industry grows seemingly with each passing day and plays a critical role in creating awareness on several issues that impact the masses.

Market Size

Indian animation industry (AGV) has grown at brisk pace from US$ 177 million in 2005 to US$ 961 million in 2013. Exports from AGV from India valued at about US$ 500 million. The animation industry in India can be divided into the following key segments:

- Animation entertainment - 20%
- Custom content development and multimedia/web design – largest segment – 64% - where animation is used for education, training and simulation purposes and also the console gaming market
- VFX – 16%



Huge potential for animation & gaming industry is created by: rising no of TV channels, accessibility to internet, proliferation of mobile devices. Indian players are primarily involved in labour-intensive production & post-production activities. India has around 300 animation companies, employing about 12,000 people.

The Indian M&E industry is projected to grow 11.8 per cent to clock revenues worth US$ 16 billion in 2013, according to an industry report. While conventional media such as television (TV), print and radio continue to be dominant segments, animation, visual effects, films and music are also posting strong progress owing to content and the benefits of digitization. The Indian media and entertainment (M&E) industry has massive reach. The industry is largely driven by increased digitization, growth of regional media, robust film industry and emergence of new media for content delivery.

FDI Inflow

The AV market in India is projected to enjoy a CAGR of 25 per cent and reach US$ 5.1 billion by 2015, driven by expenditures in sectors such as education, infrastructure and corporate information technology. By 2015, India could become the third largest AV market in the Asia–Pacific region.

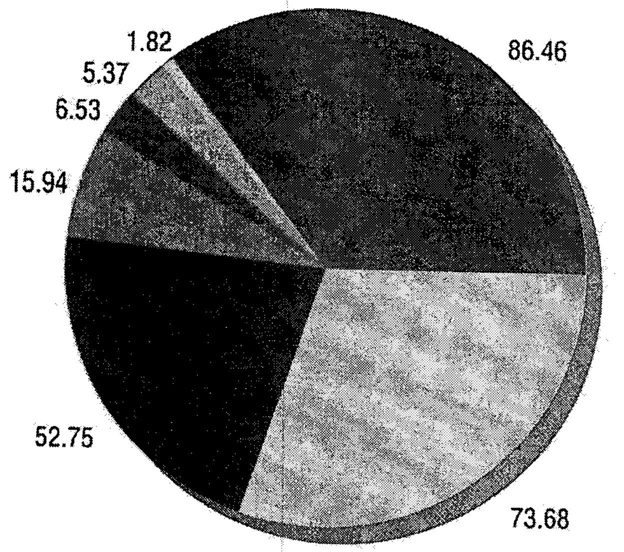
The marquee transactions during 2011 included Walt Disney Company's acquisition of an additional 41 per cent stake at a value estimated to be over $300 million in UTV Software (which took its shareholding in UTV to approximately 90 per cent), Providence Equity Partners' PE investment in UFO Moviez India ($58 million), and HSBC PE's investment in Avitel Post Studioz ($60 million). FDI in teleport hubs, direct-to-home, cable networks, and multi-system networks is proposed to be raised to 74 per cent from the present 49 per cent if they undertake to upgrade and digitize their systems with addressability.

Government Initiatives

Indian Government intends to glorify and magnify the heritage of Indian films and promote the country as a Film Tourism Destination. With a view to substantiate the same, a composite delegation from the Ministry of Information and Broadcasting (I&B) and Ministry of Tourism (MOT), Government of India (GOI) participated in Cannes Film Festival 2013. With such initiatives, the GOI wants to promote Indian cinema as a sub brand of the 'Incredible India' campaign at various international film festivals like IFFI Goa, European Film Market, and Cannes Film Festival, to develop synergy between the tourism and film industries, and to provide a platform for facilitating partnerships between the Indian and global film industry.

I&B ministry have also launched a multi-media initiative that aims to highlight the impact of Government policies at grassroots level across multiple sectors. The drive namely 'Glimpses of the India Story' would capture the journey of development in the last nine years across various sectors through the programs and policies of the Government in India. The multi-media initiative would be aired on television, radio, print and outdoor publicity with the objective of informing and appraising the public to encourage greater participation in such efforts.

PROJECT EXPORT CONTRACTS SECURED DURING 2012-13 (~Billion)



Market Size

Consulting Services has today emerged as one of the main business areas in India. The Indian Management Consulting Market is still in its nascent stages. The key factors defining the market are high growth and large entry of players. The Indian Consulting market is predominately driven by Technical Consulting contributing to about 2/3rd of total consulting market, while Management Consulting contributes about 1/3rd of total consulting market. Technical consulting in India i.e. mainly engineering consulting is stronger than Management Consulting in terms of number of players, consulting capabilities, size of consulting firms, etc. whereas Indian Management Consulting market is mainly dominated by large multinational consulting firms.

Due to the nature of the industry, getting accurate estimates of its size is difficult. In terms of revenue, it is still very small compared to global consulting market. In 2006-07, the revenue size of Indian Consulting industry stood at US$ 4.41 billion, which comprised US$ 2.91 billion share in the engineering consulting market and US$1.5 billion share in the management consulting market. In 2010-11, the revenue size of Indian consulting Industry on a conservative basis has been estimated at around 8.24 billion US$. However, the growth rates of the industry have been extremely promising over the last few years and the projected revenue is expected to increase to 9.89 billion US$ by 2011-12 at a CAGR of 20%.

Strengths and Challenges

The major strengths of Indian consulting organizations include professional competence, low cost structure, diverse capabilities, high adaptability and quick learning capability of Indian consultants.

Though in terms of capabilities, clients find Indian Consultants to be at par with International Consultants, yet, Indian Management Consulting services is facing challenges which has hindered the export growth of Consulting Services. Some of these weaknesses are as follows:

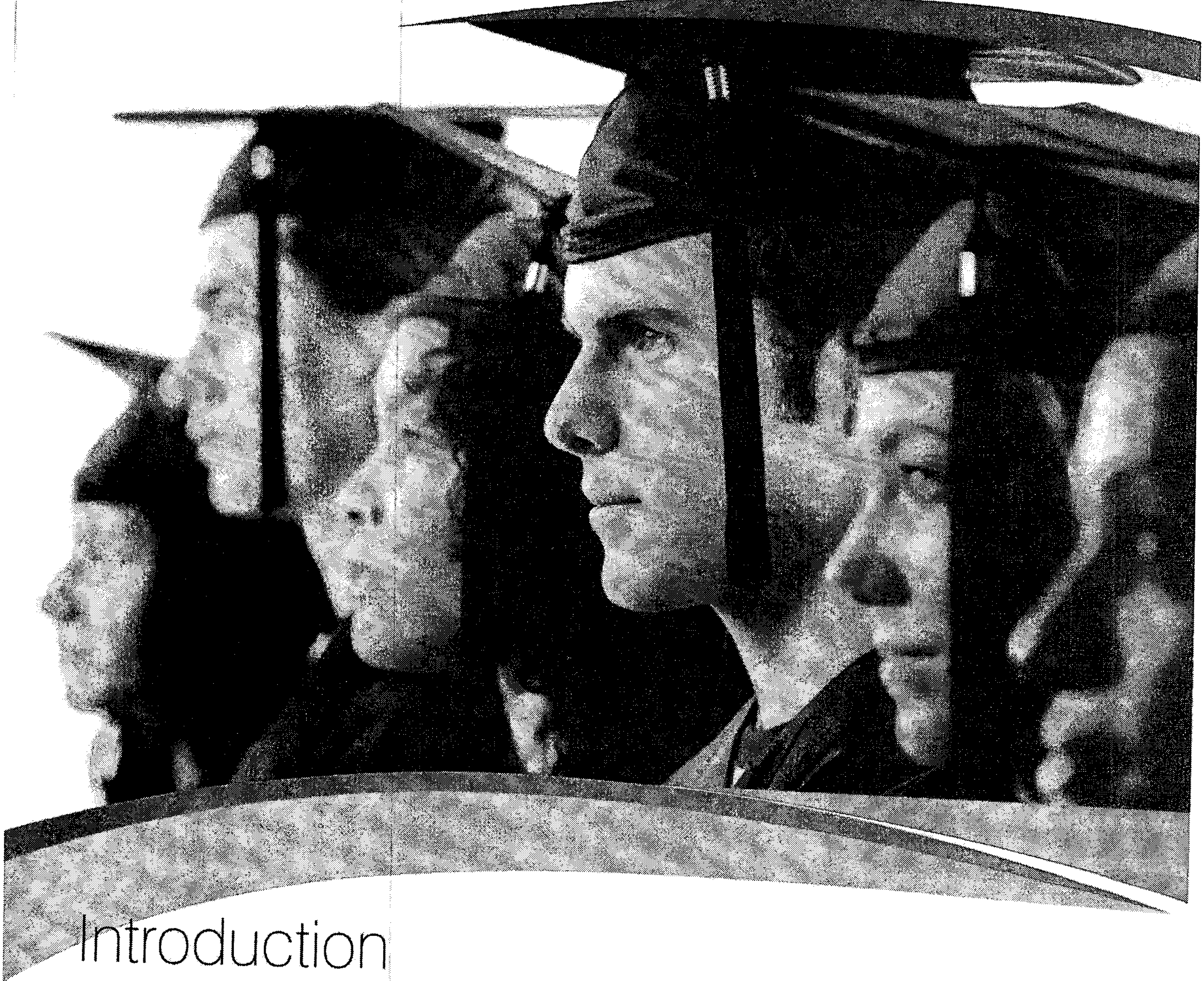
- Shortage of experienced consulting professionals in Management Consulting
- Lack of consistent learning and development opportunities for professionals particularly with regard to latest developments in management consulting area
- Limited local presence of Indian Consulting Companies in overseas countries
- Lack of International experience for Indian Consultants on Consulting assignments
- Lack of market intelligence on consulting opportunities abroad
- Low equity base
- Low level of R&D
- Lack of brand image of Indian Management Consulting Professionals and firms
- Lack of Large size Indian Consulting firms in Management Consulting.

The Road Ahead

In the past decade, India has emerged as one of the fastest growing consulting markets due to increased investing activities resulting from liberalization of FDI restrictions, entry of new players in the Indian market, high growth in key sectors of economy and due to the country being a low cost sourcing destination. This has resulted in a paradigm shift in client acceptability of consultants and importance of consulting advice in business affairs resulting in transformation of conventional consulting into high impact consulting.

SERVICES EXPORT PROMOTION COUNCIL

Education Services



Introduction

A progressive higher education sector plays a predominant role in economic growth and development of a nation. India, being one of the largest networks of higher education system in the world, comprises about 700 universities and over 35,000 colleges, offering education and training facilities in almost all aspects of human creativity and intellectual endeavor. The country has an annual enrolment of over 25 million students (including enrolment under open and distance learning system).

India claimed 10 of the top 100 places in Times Higher Education's BRICS & Emerging Economies Rankings 2014—the world's first ranking of universities in Brazil, Russia, India, China and South Africa, as well as 17 other emerging economies.

Market Size

The private education sector is estimated to reach US$ 115 billion by 2018, according to consulting firm Technopak. Technopak sees enrollments in Kindergarten-12th grade (K-12) growing to 351 million, requiring an additional 34 million seats by 2018.

According to a report 'Education in India: Securing the demographic dividend', published by Grant Thornton, the primary and secondary education, or K-12 sector is expected to reach US$ 50 billion in 2015 from US$ 24.5 billion in 2008, growing at an estimated compound annual growth rate (CAGR) of 14 per cent.