

A Monthly Newsletter by

SEPC

SERVICES EXPORT PROMOTION COUNCIL
Setup by Ministry of Commerce & Industry, Govt. of India

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SERVICES EXPORT PROMOTION COUNCIL

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### Mr. Karan Rathore (Chairman)

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### Mr. Sunil H. Talati (Former Chairman)

(Accounting, Auditing, Book Keeping and Financial Services)

### Mr. Joy Basu

(Advertising Services)

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(Architectural Services)

### Mr. Amit Sharma

(Design and Engineering Consulting Services)

### Mr. Rajesh Kumar

(Consultancy Services)

### Dr. Vidya Yeravdekar

(Educational Services)

### Mr. Hirachand Dand

(Entertainment services)

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(Travel & Tourism Related Services)

# India **Serves**

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Karan Rathore

Dear Members,

Our efforts would be aligning the expectations of the industry with the goal of achieving 1trn **USD** services export by 2030

Greetings from Services Export Promotion Council (SEPC)

Having served the industry for two years in the capacity as Vice Chairman, I am honoured to take over as Chairman. I intend to carry forward the initiatives taken by the immediate past Chairman and chart out a new course of direction to take services exports from India to the next level.

Having diverse sectors, each with its unique challenges and opportunities, the role of SEPC in serving the services sector for export becomes very significant. Our efforts would be aligning the expectations of the industry with the goal of achieving 1trn USD services export by 2030. In line with Amrit Kal goals, we would collectively steer SEPC to position as knowledge hub, create value additions and bring business opportunities for the stakeholders.

Besides launching awareness programmes about SEPC's activities to serve various sectors through trade intelligence, export development, export promotion and creating enabling business environment slew of new initiatives will be rolled out for the benefits of members and industry as a whole including forging a strong integration with various Ministries, Associations/Trade bodies, Indian Embassies and Missions, overseas Chambers of Commerce/associations and overseas embassies in India.

I look forward to have your support to serve you in the best possible way. You can reach me at chairman@servicesepc.org

With best regards



Karan Rathore Chairman



# OVERVIEW OF SERVICES OFFERED BY SEPC









Services
Export Promotion
Council set up in
2006 by Ministry
of Commerce
& Industry,
Government of
India is an apex
trade body to
promote exports
of services
from India.

Key role in Foreign Trade Policy, Export Strategy formulation by Department of Commerce and related Govt Departments.

Interface between Services Sector and Government

Provides inputs on Trade Negotiations

Represents Services Sector in various Joint Trade Committees, Joint Business Councils and Joint Working Groups of Government of India to facilitate export.

Creates Business opportunities in global market place for services exporters

Providing commercially useful information and assistance to members in increasing exports.

Organising visits of delegation of its members abroad to explore overseas market opportunities.

Organising participation of Services exporters in specialised International Trade Fairs.

Dissemination of government notification, orders, information on trade and other relevant information to members.

Facilitates execution of Government Schemes like SEIS.

### Services Covered under SEPC

In order to enhance the competitiveness of services exports and enable services industry to generate employment, the Union Cabinet chaired by Honourable Prime Minister Shri Narendra Modi in 2018 identified 12 Champion Services Sector.

The following table provides the mapping of identified Champion Services vis-a vis the services covered under SEPC and BPM6 classification. Sixth edition of the Balance of Payments and International Investment Position Manual (BPM6) is developed by IMF in collaboration with compilers and other interested parties worldwide and used by most of the countries to record and report services trade data.

S.N.	Services covered under SEPC	Champion Services	BPM6 Classification		
1	Accounting/Auditing and Bookkeeping Services	Accounting and Finance Services			
2	Consultancy Services	-			
3	Legal Services	Legal services	Other business services		
4	Architectural Services and related services	Construction and related Engineering services			
5	Environmental services	Environmental services	_ Other business services		
6	Marketing Research and Public Opinion Polling Services/ Management services	-			
7	Advertising Services	-			
8	Printing and Publishing services	-			
9	Other services (IT & ITES, Communication Services)	IT & ITES, Communication services	Telecommunications, computer, and information services		
10	Hotel and Tourism Related Services	Tourism and Hospitality Services			
11	Education Services	Education services	Travel		
12	Healthcare services including services by nurses, physiotherapist and paramedical personnel	Medical Value Travel Services	Tavel		
13	Maritime Transport Services	Transport and Logistics	Transport		
14	Distribution Services	services			
	Other services (Financial Services)		Financial services		
15		Financial Services	Insurance and pension services		
16	Entertainment services including Audio-visual services	Audio-visual services	Personal, cultural, and recreational services		
	Other Services	-	Charges for the use of intellectual property n.i.e.		
17		-	Government goods and services n.i.e.		
		-	Manufacturing services on physical inputs owned by others		
		-	Maintenance and repair services n.i.e.		
		Construction and related Engineering services	Construction		
			Services not allocated		

# Global Engineering Consultancy Services

Shaping a Sustainable Future

- opportunities high growth Engineering Consultancy Services with Innovations and
- Collaborate and Innovate to Capitalize high growth Global Engineering Consultancy Services
- 3. India's domestic growth powering Indian Engineering Consultancy Services for Global Market
- 4. Changing face to Engineering Services: Growth of **Engineering Consultancy Services**

Globally there is huge demand for engineering consultancy professionals as they coordinate and provide a host of services involving the planning and building of commercial, industrial, residential, and non-building construction projects.

Investments in infrastructure projects such as smart city, sustainable infrastructures, and renovation of aging infrastructure in developed and developing economies is expected to fuel market growth. Furthermore, subsequent government efforts and commitment for creating new state of the art infrastructure projects, and addressing infrastructural deficiencies across various sector is bound to create a demand and supply gap for skilled professionals who can ensure holistic execution of these projects.

Covid made Governments realize deficiencies in healthcare facilities. Hospitals are establishing new facilities and reorganizing existing spaces. This will help to optimize the building space to seamlessly treat patients. Increased tourism has led to the development of new hotels, resorts, and restaurants at tourist locations. Due to environmental consciousness, Green Construction is also in great demand. All these recent developments have created more demand for companies and professionals who can provide consultancy services in addition to architectural and construction solutions.



As per UNSD classification engineering consultancy services comprise of advisory, consultative, design, surveying & mapping services, geophysical services, laboratory testing services and building inspection services and drafting services etc. (See table 1 in appendix for more details)

Global Engineering Consultancy Services market will be worth USD 150 bn by 2025. Global imports

were to the tune of USD 42.02 bn in 2021 with United States of America (Total import USD 10.62 bn, share 25.28 per cent), Germany (Total import USD 8.19 bn, share 19.49 per cent) and France (Total import USD 4.22 bn, share 10.06 per cent) as major importers. Import growth in Finland was 94.47 per cent, whereas Romania witnessed 130.58 per cent growth in this sector. (see table 2 in appendix for more details)

### GLOBAL MARKET FOR ENGINEERING CONSULTANCY SERVICES: GROWTH DRIVERS

Apart from some of the factors mentioned above, the key drivers in this sector are:

### Growing environmental consciousness

There is a growing emphasis on sustainable and eco-friendly architecture. Design needs to be adapted to create buildings with minimal carbon footprint. This includes utilizing renewable energy sources, efficient insulation, and eco-friendly materials in construction.

### Disruptive Technology

Artificial Intelligence (AI), VR (Virtual Reality) and machine learning are being integrated into the Architecture, Engineering, and Construction sector. Al algorithms help in design optimization, project management, and predictive analysis, thereby enhancing efficiency, reducing errors, and facilitating faster decision-making processes. Cloud-based collaboration platforms, and real-time communication tools enable seamless collaboration between teams, clients, and stakeholders, regardless of geographical locations. 3D civil printing, pre cast/pre fab are recent trend in construction sector due to which project completion time have drastically reduced

### Demands for Sustainable Architecture:

Clients and communities are increasingly demanding sustainable structures, focusing not only energy efficiency but also considering the overall environmental impact, water conservation, and the use of recyclable materials. Sustainable construction practices are becoming standard in the industry.

### Modular Design

Modular design principles are gaining prominence. Architects and engineers are designing buildings with modular components that can be easily assembled, disassembled, and reconfigured. This flexibility allows for adaptive reuse, reducing waste and supporting sustainable construction practices.

### Collaborative Innovation

Firms are beginning to recognize the value of col-

laborative innovation and co-creation with clients and stakeholders. Emphasis is on being a change leader, fostering a culture of innovation not only within the organization but also in the entire ecosystem. Companies are becoming adept at anticipating market changes and proactively leading innovation initiatives not only with partners but also with clients.

### **End-to-End Solutions**

The shift is towards a seamless End-to-End process, starting from conceptualization to commissioning, with a focus on intellectual property (IP) ownership. Integrated design thinking, facilitated by advanced 3D modeling technologies, ensures a holistic approach, reducing errors and improving efficiency.

### Comprehensive Outsourcing Solutions

The trend is towards more comprehensive outsourcing models like Engineering, Procurement, and Construction Management (EPCM), Build-Own-Operate-Transfer (BOOT), and Design-Build. These approaches streamline the project lifecycle, ensuring accountability and efficiency at every stage.

### Strategic Subcontracting

Companies are focusing on strategic subcontracting, where contracts are awarded based on specialization, reliability, and efficiency. These partnerships are becoming more integrated and collaborative, ensuring a cohesive project execution.

### Strategic Partnerships

Partnerships and joint ventures are common for large projects, involving collaboration between multiple entities. LSTK (Lump Sum Turn Key) and EPC (Engineering, Procurement, Construction) contracts are standard in the industry. The future lies in true LSTK and EPC models, where the contractor takes full responsibility for every aspect, from design to commissioning. Partnerships and joint ventures are evolving to be more strategic, with a focus on long-term relationships and mutual growth.

### Supply chain disruptions

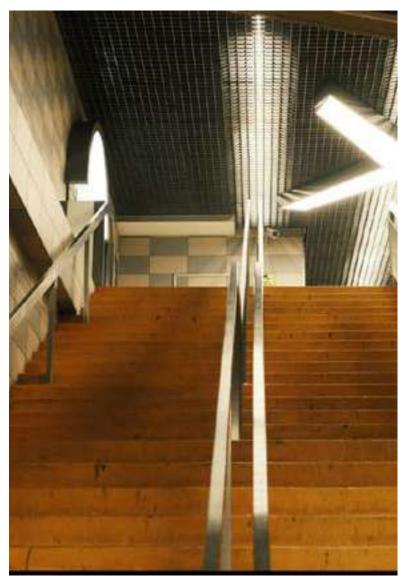
Supply chain disruptions create product and/or material shortages and interfere with project schedules. This is also exacerbating the price inflation that is being felt on infrastructure projects. These major cost spikes are impacting the already slim profit margins in these industries and affecting project budgeting. The unpredictability of future costs is also shaping how companies bid on projects, with firms more reluctant to take riskier jobs and/or delaying bids

### Higher interest rates

This makes it costlier for firms to borrow money, which is typically how construction projects are financed. This will be a headwind for the industry's growth.

### INDIAN ENGINEERING CONSULTANCY **SECTOR: GROWTH STORY**

Infrastructure is one of the key verticals that is fueling India's ambitious growth story. Due to Government's focus on infrastructure development many policies initiatives were taken for creating world class infrastructure in the country. Projects like PM Gati Shakti, Sagarmala, Smart Cities Mission, Jal Jeevan Mission and several other initiatives to address infrastructural deficiencies in healthcare, power, water, transportation sector created huge opportunity for Engineering Consultancy Services in the country. Also, the Government's firm emphasis on self-reliance or aatmanirbharata provided the right opportunity to the Engineering consultants to showcase their skills in creating world class infrastructure across the country. These skilled professionals are not only catering to the demand in the domestic market but are also exploring opportunities in the global marketplace.







### Strategic initiatives for exploiting growth potential in the sector

Though, the outlook is very lucrative, and Indian companies are also gearing up to compete in the global marketplace. The potential in this sector cannot be exploited by Indian companies until the following challenges are appropriately addressed by the policy makers in consultation with all the stakeholders.

### **Industry led initiatives**

### **Strategic Collaborations**

Indian firms have historically approached international tenders in a fragmented, small-scale manner, lacking a unified strategy. Forming joint ventures in Public-Private Partnership (PPP) models with strong government support can provide a competitive edge. This approach ensures coordinated efforts, leverages government backing, and enhances the capacity of Indian firms to compete on international tenders.

### **Large Deals with Consortium Approach**

Indian companies must concentrate on large projects with a strategic approach, forming Consortia or Joint Ventures (JVs) to pool resources, expertise, and credibility. Many foreign countries have professional licensing/certification requirements for Engineering professionals working on projects in the foreign market which may require at least one professional to be certified in that country. This issue can be addressed either by hiring/collaborating with a local professional and establish local presence by setting up foreign affiliates.

### Industry-Academia collaboration for Curriculum with global outlook

Discrepancies exist in the curriculum and education standards of the Indian workforce compared to international counterparts. Establishing partnerships between Indian educational institutions and international counterparts can bridge the gap. Implementing standardized curriculum and continuous learning programs can ensure that the workforce meets international quality standards consistently. Emphasize practical skills, innovation, and interdisciplinary learning to prepare the Indian workforce for global competition.

### Capitalize on experiential learning in domestic market

Transform local expertise into exportable products and services. Embrace advanced technologies like 3D-4D-5D modelling and Industry 4.0 solutions, enhancing the appeal of offerings.

### Leverage India's Brand in IT sector

Capitalize on India's strong reputation in the IT sector. Leverage digital solutions, emphasizing innovation and efficiency, to enhance offerings. Enhance Financial Acumen
Strengthen financial understanding, focusing on

funding, loans, grants, taxation, structuring, and currency management. This financial expertise ensures stability and sustainable growth.

### **Capability Development**

Invest in training, certification, continuous improvement, and excellence programs. Upholding high-quality standards ensures the workforce is skilled and competitive.

### Constant upgradation of Project Management Skills

Develop a robust project and program management mindset. Emphasize strong planning, scenario-making, risk management, cost management, and contract management. This ensures efficient project execution and client satisfaction.

### Innovation is the key to success

Adopt new technological approaches. Collaborate with companies with technical competencies to stay at the forefront of innovation.

### **Enhance workforce competencies**

Focus on enhancing the local workforce's skills and competencies. Facilitate knowledge transfer, fostering upskilling, growth and stability.

### **Ethical Integrity**

Adhere strictly to ethics, compliance, and local regulations. Uphold a high level of integrity, representing India's values and reputation above all else.

### Government led Initiatives

### **Policy Framework for Service Sectors:**

Government should introduce Special Economic Zone (SEZ), Production-Linked Incentive (PLI) schemes and many other such schemes tailored for service sectors. These incentives promote growth, exports, and investment in service-based industries.

### **Trade Promotion Desk**

Setup dedicated desks in Ministry for champion sectors to address specific issues in sectors having growth potential for export from the country. This facilitate addressing challenges with a focus approach for the champion sectors.

### **Line of Credit for international projects**

Government intervention to provide a line of credit and support in forming consortia for bidding on larger projects. This intervention boosts financial capability and confidence among Indian firms to participate in substantial international projects.

### **Invest in Research & Development**

Strengthen institutions that support the engineering industry. Provide resources, infrastructure, and training to enhance research, development, and innovation capabilities among engineering professionals.

### **Address Non-Tariff Barriers**

Stringent visa regulations hinder the mobility of professionals, affecting their ability to engage in international projects. Relaxation in visa regimes, exploring project-specific visa categories, and negotiating favorable terms can facilitate the movement of skilled professionals. This ease of mobility is crucial for the success of international projects.

### **Introduce Engineers Bill**

Introduce the long pending Engineers Bill to enhance professionalism within the engineering ecosystem. Clear legislation will ensure standardization, ethics, and growth, making the sector more reliable and trustworthy. India has acts for lawyers, doctors, architects, medical professionals, and others but not for engineers to regulate their activities.

### **Certification for Global Acceptance**

Implement certification programs, for Engineers, which should have global acceptance, otherwise it will be difficult to complete registration formalities in individual countries

### **Mutual Recognition Agreements (MRAs)**

Countries can have Mutual Recognition Agreements (MRAs) to recognize licenses issued by national regulatory agencies. This will facilitate Engineering professionals to work beyond borders

## <u>Support to Overcome regulatory hurdles in implementing international projects</u>

Complexities related to approvals, Permanent Establishment (PE) regulations, taxation, Withholding Tax (WHT), and Transfer Pricing hinder smooth international operations.

Government support in engaging with relevant authorities to streamline approval processes, providing clarity on taxation and transfer pricing policies, and negotiating favourable terms can ease these hurdles.



A LONG



### **Appendix**

### Table 1: UNSD Classification of Architectural, Engineering, and other Technical Services

867 - Architectural, Engineering and other Technical Services					
8671	Architectural services				
86711	Advisory and pre-design architectural services				
86712	Architectural design services				
86713	Contract administration services				
86714	Combined architectural design and contract administration services 86719 - Other architectural services				
8672	Engineering services				
86721	Advisory and consultative engineering services				
86722	Engineering design services for the construction of foundations and building structures				
86723	Engineering design services for mechanical and electrical installations for buildings				
86724	Engineering design services for the construction of civil engineering works				
86725	Engineering design services for industrial processes and production				
86726	Engineering design services n.e.c.				
86727	Other engineering services during the construction and installation phase				
86729	Other engineering services				
8673	Integrated engineering services				
86731	Integrated engineering services for transportation infrastructure turnkey projects				
86732	Integrated engineering and project management services for water supply and sanitation works turnkey projects				
86733	Integrated engineering services for the construction of manufacturing turnkey projects				
86739	Integrated engineering services for other turnkey projects				
8674	Urban planning and landscape architectural services				
86741	Urban planning services				
86742	Landscape architectural services				
8675	Engineering related scientific and technical consulting services				
86751	Geological, geophysical and other scientific prospecting services				
86752	Subsurface surveying services				
86753	Surface surveying services				
86754	Map making services				
8676	Technical testing and analysis services				
86761	Composition and purity testing and analysis services				
86762	Testing and analysis services of physical properties				
86763	Testing and analysis services of integrated mechanical and electrical systems				
86764	Technical inspection services				
86769	Other technical testing and analysis services				



**Table 2: Engineering Services : Major importing countries** 

Importers	Imported value in 2018	Imported value in 2019	YoY growth	Imported value in 2020	YoY growth	Imported value in 2021	YoY growth	%age share
United States of America	5596000	7672000	37.10	8852000	15.38	10626000	20.04	25.28
Germany	8141500	8437479	3.64	7660709	-9.21	8192842	6.95	19.49
France	6671212	3909205	-41.40	3745261	-4.19	4228297	12.90	10.06
United Kingdom	5448737	4943550	-9.27	4683336	-5.26	3763075	-19.65	8.95
Singapore	2552338	2590095	1.48	n/a	n/a	n/a	n/a	n/a
Italy	2251608	2353807	4.54	2542300	8.01	3152949	24.02	7.50
Austria	2164690	2270294	4.88	2155324	-5.06	2344191	8.76	5.58
Belgium	1525793	1700482	11.45	1878913	10.49	1868730	-0.54	4.45
Denmark	958293	1108142	15.64	1109672	0.14	1102577	-0.64	2.62
Netherlands	778367	982675	26.25	1214269	23.57	1060327	-12.68	2.52
Sweden	861967	962925	11.71	819062	-14.94	1003817	22.56	2.39
Finland	438134	432117	-1.37	515130	19.21	1001781	94.47	2.38
Canada	1060300	979800	-7.59	812700	-17.05	877300	7.95	2.09
Poland	831482	778283	-6.40	838985	7.80	846507	0.90	2.01
Hungary	443382	603572	36.13	540224	-10.50	445754	-17.49	1.06
Romania	206274	190241	-7.77	171347	-9.93	395100	130.58	0.94
Ireland	63772	72766	14.10	n/a	n/a	249558	n/a	0.59
Luxembourg	145257	163443	12.52	179325	9.72	197518	10.15	0.47
Czech Republic	108702	119662	10.08	109535	-8.46	143468	30.98	0.34
Portugal	120457	115306	-4.28	116504	1.04	123005	5.58	0.29
Slovakia	93414	111500	19.36	92289	-17.23	112360	21.75	0.27
Greece	79596	68176	-14.35	61222	-10.20	84684	38.32	0.20
Croatia	50309	55190	9.70	46373	-15.98	64459	39.00	0.15
Slovenia	69322	38510	-44.45	62935	63.43	44708	-28.96	0.11
Bulgaria	26675	25077	-5.99	29628	18.15	35479	19.75	0.08
Estonia	19840	12314	-37.93	12450	1.10	23418	88.10	0.06
Iceland	13580	10637	-21.67	15068	41.66	21519	42.81	0.05
Lithuania	8030	9963	24.07	15648	57.06	16558	5.82	0.04
Total Import	40729031	40717211		38280209		42025981		

Source : ITC Trade Map

Statistics for India is not available



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# A ONE-DAY CONCLAVE ON DESIGN, ENGINEERING, CONSTRUCTION, R&D AND ENVIRONMENTAL SERVICES:

Sustainable Energy, Transportation, and Infrastructure Services was jointly organized by SEPC (Services Export Promotion Council of India), CEAI (Consulting Engineers Association of India) on 15th Sept, 2023 at hotel Le-Meridian New Delhi. Deliberations were focused on the challenges, opportunities and way forward for boosting the cross-border trade of the engineering services (Construction & Design Engineering Consultancy, Engineering, R&D and Environmental Services).



prising of Industry experts & Leaders of respective fields. The guest of honour, Shri Piyush Goyal, Minister of Commerce & Industry, Consumer Affairs, Food & Public Distribution, Textiles, Government of India, gave a special address whereby reassuring the participants that the Govt is committed to its



goal of boosting the exports from the said segment of the service industry & receptive to all constructive insights which shall come out of the deliberations. He also emphasised that to drive India's growth & innovation, we should review German Model and suggests Yahi

Samay! Sahi Samay!! He also tried to encourage engineering community to achieve USD 100 billion export target by 2030. The program was welcomed by the industry members & stakeholders for providing a common platform for interaction among each other to discuss various pertinent issues, hurdles faced by them on various fronts in the domestic as well as international arena & voice their valuable suggestions in the policy circles.











undertake business visits

























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### Dr. Mahesh Bandimegal

MBBS, MS (General Surgery), MCh (Surgical Oncology) Surgical Oncology

Breast cancer is a significant health concern in India. The incidence of breast cancer has been on the rise in recent years. Several factors contribute to this trend.

Increasing Population: India's growing population means more individuals are at risk for breast cancer.

Changing Lifestyle: Urbanization and the adoption of Western lifestyles have led to changes in dietary habits and reduced physical activity, which can increase the risk of breast cancer.

Genetic Factors: Studies suggest that certain genetic factors may contribute to the incidence of breast cancer in specific regions of India.

Hormonal Factors: Early age of menstruation, late age of menopause, and fewer pregnancies can be risk factors.

However, advances in medical science and treatment options have offered new hope to patients. One such treatment option that has gained prominence is Breast-Conserving Surgery (BCS), also known as lumpectomy.

BCS aims to preserve as much of the healthy breast tissue as possible while removing the cancerous tumor. This approach helps women maintain a natural breast appearance, which can significantly impact their selfesteem and body image.

Studies have shown that BCS is as effective as mastectomy (complete breast removal) in treating early-stage breast cancer when followed by radiation therapy. It allows for the removal of cancerous tissue while minimizing the physical and emotional impact on the patient.

During the surgical procedure, the surgeon removes the turnor along with a surrounding margin of healthy tissue. The goal is to ensure all cancer cells are eliminated while preserving as much of the breast as possible.

### Benefits of BCS:

### Improved Quality of Life:

One of the primary benefits of BCS is its positive impact on a patient's quality of life. The preservation of the breast's appearance can boost self-confidence and emotional well-being.

#### Equivalent Survival Rates:

Extensive research has shown that BCS followed by radiation therapy offers survival rates comparable to mastectomy. Thus, patients can opt for this less invasive approach without compromising their chances of survival Oncoplastic breast cancer surgery is a surgical approach that combines encology (cancer treatment) and plastic surgery techniques. It aims to remove cancerous tissue while preserving the appearance and contour of the breast as much as possible. This approach is often used for breast-

conserving surgery after lumpectomy, where the cancerous lump is removed along with some surrounding tissue.

### The goals of oncoplastic surgery include:

Complete cancer removal: Ensuring all cancerous tissue is removed to reduce the risk of recurrence. Cosmetic outcomes: Minimizing changes to the breast's appearance and symmetry.

### Preservation of breast function.

Oncoplastic surgery can involve techniques like reshaping the breast, repositioning tissue, and even using breast implants or fat grafting to restore the breast's appearance. It's typically performed by a surgical team that includes both a breast cancer surgeon and a plastic surgeon.



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