



Department of Commerce  
Ministry of Commerce & Industry  
Government of India



**ICSI**  
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INTERNATIONAL CHAMBER FOR SERVICE INDUSTRY  
Confluence of Service Industry  
(Govt. - Corporate - NRI's Business Interface)  
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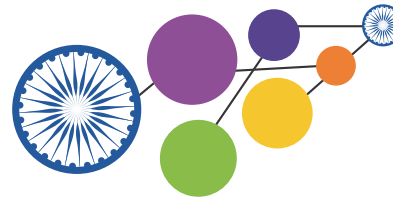
ASSOCIATION  
OF SOUTHEAST  
ASIAN NATIONS

Proposed

## FOCUS AREAS

- Educational Services
- Tourism - Hospitality & Aviation Related Services
- Media & Entertainment Services
- IT - ITeS & Telecom
- Retail - Logistics - E-Commerce
- Wellness - Health & Social Services
- Exhibition & Event Services
- Energy Services - Power Sector
- Facility Management Services
- Printing & Publishing Services
- Railway Services
- Financial - Banking - Insurance Services
- IPR Services
- MSMEs & Startups
- Professional Services
- Environmental Services
- Construction and Related Engineering Services
- Skills Development - Finishing School
- Space Related Services
- Culture - Recreational & Sporting Services
- Art - Craft - Handicraft - Textiles & Fashion

4<sup>th</sup>



## Global Exhibition on Services

THE NORTHEAST INDIA - ASEAN - JAPAN - SOUTH KOREA OPPORTUNITY  
15-18 May 2018, Bombay Exhibition Centre, Mumbai, India

# A GLOBAL PLATFORM FOR INCREASING TRADE IN SERVICES

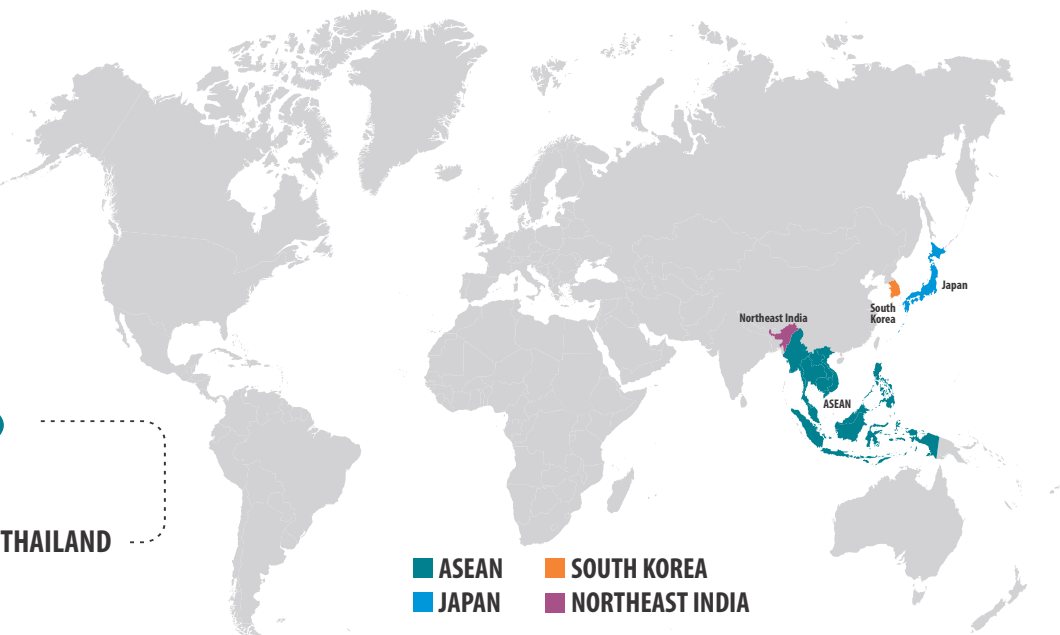


## ENHANCING SERVICES TRADE

SPECIAL FOCUS

**CLMVT**

CAMBODIA | LAOS | MYANMAR | VIETNAM | THAILAND



■ ASEAN  
■ JAPAN

■ SOUTH KOREA  
■ NORTHEAST INDIA

**NORTHEAST INDIA - ASEAN - JAPAN - SOUTH KOREA**

# INTERNATIONAL EXPO - CONFERENCE - PANEL DISCUSSIONS - B2B - G2G MEETINGS WITH FOCUS ON SERVICES EXPORT



## SPECIAL EVENING ON NORTHEAST INDIA-ASEAN

17 MAY 2018 | MUMBAI



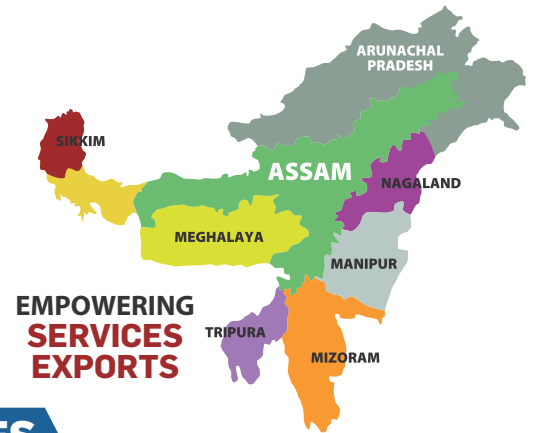
## Northeast India - ASEAN Cinematic Tourism Potential



Cinematic Tourism Roadmap released on 30th June 2017 at International Conference, Mumbai

**Come & Shoot your Film - Music Album - Add Film - Tele Serial with State Incentives**

## ASEAN - JAPAN - SOUTH KOREA & NORTHEAST INDIA CHAMBER'S



## IMPORTANT AREAS FOR TRADE IN SERVICES

**EDUCATION:** The country has more than 1.5 million schools with over 260 million students enrolled and about 751 universities and 35,539 colleges.

**MEDIA - ENTERTAINMENT:** The Indian media & entertainment sector is expected to grow at a Compound Annual Growth Rate (CAGR) of 13.9 per cent, to reach US\$ 37.55 billion by 2021.

**TOURISM - HOSPITALITY & AVIATION:** India to be third largest tourism economy in 10 years. The WTTC report, released globally said India will add nearly 10 million jobs in the Tourism Sector by 2028.

**FINANCIAL - BANKING - INSURANCE SERVICES:** A two-year plan to strengthen the public sector banks through reforms and capital infusion of Rs 2.11 lakh crore (US\$ 32.5 billion), has been unveiled by the Government of India that will enable these banks to play a much larger role in the financial system and give a boost to the MSME sector.

**MSME IN SERVICE SECTOR:** The recent years have seen MSMEs in the services sector flourish with these enterprises accounting for over 30% share of the national GDP.

**IT - ITes:** India comprises of more than 15,000 firms, of which 1000+ are large firms. India's software service exports increased 10.3% in FY17 to US\$ 97.1 billion from US\$ 88 billion in Fy16.

**TELECOMMUNICATION:** India is currently the 2nd largest telecommunication market and has the 3rd highest number of internet users in the world.

**RETAIL - LOGISTICS:** India's retail market is expected to increase

by 60 per cent to reach US\$ 1.1 trillion by 2020, on the back of factors like rising incomes and lifestyle changes by middle class and increased digital connectivity.

**E-COMMERCE:** The Indian e-commerce market is expected to grow to US\$ 200 billion by 2026 from US\$ 38.5 billion as of 2017. The value of e-commerce market is expected to cross US\$ 50 billion by 2018.

**ENERGY / POWER SERVICES:** India has moved up 73 spots to rank 26th in the World Bank's list of electricity accessibility in 2017. India holds lots of opportunities for Exporting Power Services to ASEAN Countries.

**WELLNESS & HEALTHCARE:** The Indian wellness industry was estimated at close to Rs85,000 crore in financial year 2016-17 and is expected to grow at a compounded annual growth rate (CAGR) of nearly 12% for the next 5 years.

### PROFESSIONAL SERVICES

Prime Minister Narendra Modi has stated that India's priority will be to work towards trade facilitation agreement (TFA) for services, which is expected to help in the smooth movement of professionals

**SKILLS DEVELOPMENT THROUGH FINISHING SCHOOL:** A burgeoning population of 1.2 billion means that the average age in the country is 29 and half our population is under 25 years of age.

### ART - CRAFT - HANDICRAFT - TEXTILES & FASHION

### CULTURE - RECREATIONAL & SPORTING SERVICES

## Service Industry Supporting - Complimenting, Agriculture & Manufacturing Industry towards Regional Integration



## DELIBERATIONS - PANEL DISCUSSIONS - B2B - G2G MEETINGS

- Establishing Linkages through Higher Education
- Optimal development and propagation of AYUSH systems of Wellness and Healthcare Services in Northeast India and ASEAN
- Developing Linkages & Empowering the Youth of NORTHEAST INDIA & ASEAN with JAPAN - SOUTH KOREA through Skills Development for making them more productive
- Converting Job Seekers of NORTHEAST INDIA - ASEAN - JAPAN - SOUTH KOREA into Job Givers towards Entrepreneurship
- Establishing Cultural Linkages between NORTHEAST INDIA - ASEAN - JAPAN - SOUTH KOREA
- Capacity Building of Artisans for Leveraging Textile Industry of NORTHEAST INDIA - ASEAN - JAPAN - SOUTH KOREA
- Modern monetary policy framework through enhanced Banking - Insurance Services in dynamic NORTHEAST INDIA - ASEAN - JAPAN - SOUTH KOREA economy
- Service Sector MSMEs: Enhancing MSME Services for Services Sector in NORTHEAST INDIA - ASEAN - JAPAN - SOUTH KOREA
- Improving Air Connectivity Enhancing NORTHEAST INDIA - ASEAN - JAPAN - SOUTH KOREA Regional Integration
- Holistic Healing & Wellness Industry An Strengthening Business Opportunity
- Adding Value to Medical Tourism - Increasing Inbound from ASEAN Countries
- Finishing School - Capacity Building of Youth & Educators
- Cinematic Tourism for bridging NORTHEAST INDIA - ASEAN - JAPAN - SOUTH KOREA
- Enhancing Buddhist Pilgrimage Facilitation Services
- Service Industry Infrastructure Development of the Region
- Enhancing Energy / Power Services
- Enhancing Art - Craft - Handicraft - Handloom - Fashion related Services between NORTHEAST INDIA - ASEAN - JAPAN - SOUTH KOREA
- Environmental - Sustainable Development through CSR



## GLIMPSES OF GLOBAL EXHIBITION ON SERVICES



Skills Partner





**Global Exhibition on Services**

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**UNDER THE DYNAMIC LEADERSHIP OF**



**Sh. Narendra Modi**  
Hon'ble Prime Minister of India



**Sh. Suresh Prabhu**  
Hon'ble Minister,  
Ministry of Commerce & Industry,  
Government of India

**OPPORTUNITIES FOR GROWTH FOR SERVICE INDUSTRY ARE TREMENDOUS.**

- It is estimated that there are currently 4.8 million high-income Asian households outside Japan with an annual income above US\$ 50,000.
- With a projected medium-term economic growth outlook of 3-5 % p.a. for Southeast Asia and 5-7 % for China and India, this number is set to rise steadily.
- The growing affluence will translate into huge demand for services, especially higher end and better quality services. E.g. Quality Health care Services and education services.
- The next 15 years will see a significant outpacing by Asia, and particularly the powerhouses of China and India, of the rest of the developing world in gross domestic product (GDP), wages and consumption power.
- Also, China and India will contribute 65 million and 142 million new workers to the global workforce respectively by 2020.

**Currently, Services Sector stands as most dynamic sector of the global economy. This sector contributes:**

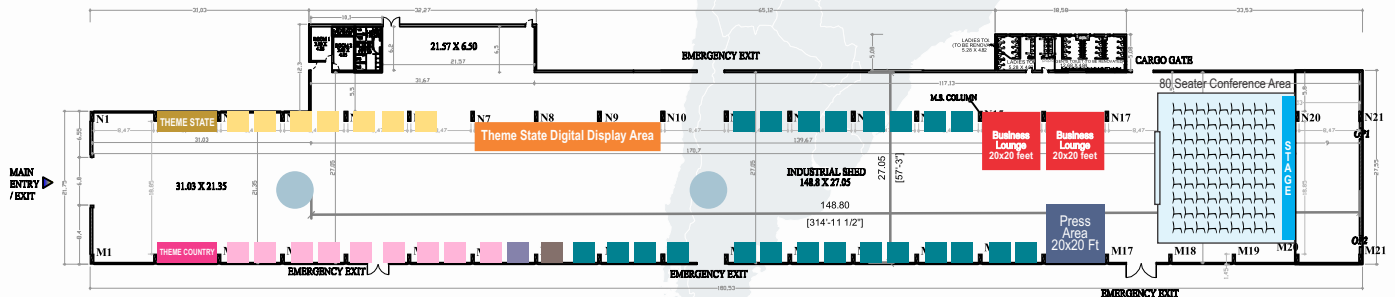
- Around 1/3rd of global Gross Value Added (GVA)
- Around half of employment
- Around 1/5th of global trade
- Around half of the world foreign direct investment flows

**SECTOR WISE SHARE OF GROSS VALUE ADDED AT CURRENT PRICE IN INDIAN ECONOMY**



Indian Services Sector has the highest Growth rate, approx. 7.75 % in March 2017. Service Sector employs nearly 40% population in the economy. It has grown at 29% rate in 2016-17. India's share in Global Services Exports stood at 3.2% in 2014-15, double that of its merchandise exports which is approx. 1.7% in global exports. The FDI investment in India from Apr16 - March17 rose to 60.08 Billion US\$. Export of services grew by 5.9% to 13.06 billion US\$ in 2016-17.

**PROPOSED DISPLAY**



**Hall - V**  
(Formerly Hall - VII)  
Total Area 4664 sq mtrs

- Stalls (Size 9x9 Feet)
- Business Lounge
- Theme Country Zone
- ASEAN Countries
- Stage
- Japan
- Theme State Digital Display Area
- Press Area
- Theme State Zone
- NORTHEAST INDIAN States
- Live Display Screens
- South Korea

# EMPOWERING SERVICES EXPORT - ENHANCING REGIONAL INTEGRATION

## NORTHEAST INDIA - ASEAN (CONFLUENCE OF CULTURE - CUISINE - ART & CRAFT - LIFESTYLE - BUSINESS OPPORTUNITY)



Source: <http://www.neda.gov.ph/2015/01/08/equity-limits-agri-policies-among-remaining-issues-free-asean-trade/>

### Opportunities in ASEAN

- ASEAN is observed to be an evolving economic powerhouse and has been gaining lot of attraction with the international investors and enterprises.

### IF ASEAN WERE A SINGLE COUNTRY

#### ASEAN AND ITS EMERGING ECONOMY



Source: <http://www.cariasean.org/asean-2/>

#### SPECIAL FOCUS

- |  |  |  |  |   |
|--|--|--|--|---|
| <p><b>Cambodia</b></p> <ul style="list-style-type: none"> <li>• Broad degree of macroeconomic stability and development.</li> <li>• One of the fastest-growing economies in the region</li> <li>• Double-digit growth rates since last five years</li> <li>• Locational proximity with India.</li> </ul> | <p><b>Laos PDR</b></p> <ul style="list-style-type: none"> <li>• Long-term socioeconomic development strategy</li> <li>• Strengthening the private sector by promoting SMEs</li> <li>• Focusing on the development of the Tourism Industry</li> <li>• Gradually Improving Infrastructure</li> </ul> | <p><b>Myanmar</b></p> <ul style="list-style-type: none"> <li>• Vast potential for future economic development</li> <li>• Big local market, young labor force &amp; natural resources</li> <li>• Advantage of its geographical location between China, India and ASEAN</li> <li>• Major Multinationals are already present</li> </ul> | <p><b>Vietnam</b></p> <ul style="list-style-type: none"> <li>• attracting efficient FDI</li> <li>• establishing better prerequisites for development of the financial market</li> <li>• All weather road connectivity for maximum population</li> <li>• Considerable skill complementarity with India</li> </ul> | <p><b>Thailand</b></p> <ul style="list-style-type: none"> <li>• Recently attracted a great deal of foreign investment.</li> <li>• Largest growth market in Asia.</li> <li>• Excellent infrastructure as well as world-class facilities in many resort towns.</li> </ul> |
|--|--|--|--|---|

- Amidst the growing economic uncertainty in the well developed markets, the regional association comprising largely of developing nations is brimming with opportunities in all sectors. It is especially important for companies operating in the Service Sector.

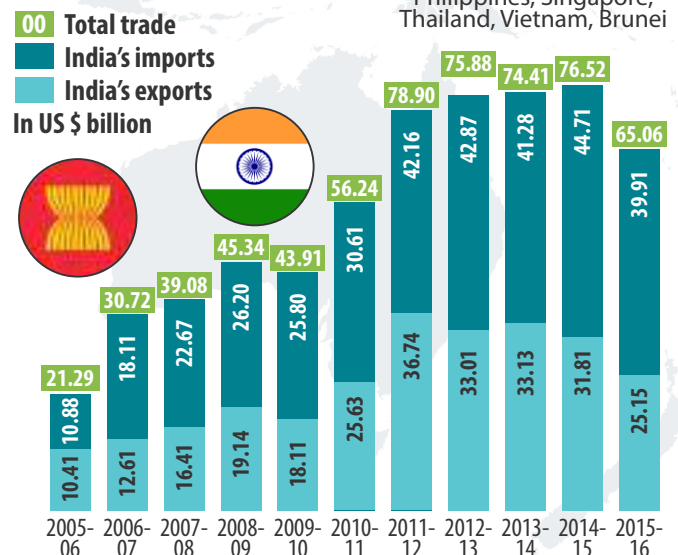
ASEAN Services growth in... South-east Asia's biggest economies averaged 5.2 per cent year-on-year in the first three quarters of 2017, against 2.7 per cent growth in manufacturing.

The balance of global economic power is shifting from west to east. Uniquely positioned at the centre of trade routes, ASEAN is set to enjoy the advantages of a growing population, expanding middle class, rising GDP and improving infrastructure.

### India's trade with ASEAN countries

#### ASEAN member countries:

Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam, Brunei

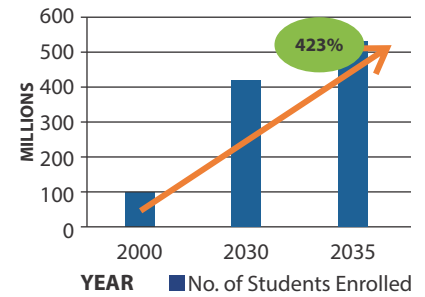


Source: <http://www.ibtimes.co.in/indias-free-trade-pact-asean-assochem-693014>

## ASIAN SCENARIO

The East Asia and the Pacific region is expected to exceed enrolments of 100 million students between 2020 and 2021, and to exceed enrolments of 200 million between 2033 and 2034. By 2035, 42% of global enrolments (or 212.9 million enrolments) will be from this region, a sharp contrast to the 25% proportion it attained back in 2000. China will remain the country in the world with the highest number of students enrolled in higher education by 2035 (anywhere between 20% and 30% of the world's total). Other countries projected to have large numbers of enrolments by 2035 are Indonesia (world's top 10), and Vietnam, Malaysia and the Philippines (all three in the world's top 20).

### FORECAST HIGHER EDUCATION - ASIA (2035)



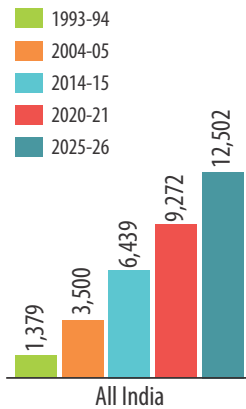
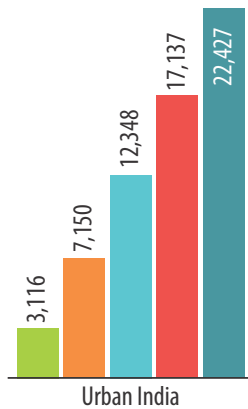
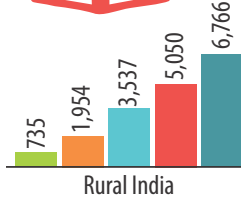
Source: <http://monitor.icef.com/2012/09/new-2035-enrolment-forecasts-place-east-asia-and-the-pacific-in-the-lead/>



## INDIAN EDUCATION INDUSTRY INSIGHT

With a median age of 25 years, India has over 550 million people below the age of 25 years. According to Census figures, over 32 per cent of the 1.1 billion population is between the age group 0-14. This means that the number of people in India needing primary and secondary education alone exceeds the entire population of the USA.

### PAST - PRESENT FUTURE



### AVERAGE ANNUAL HOUSEHOLD SPENDING ON EDUCATION

## KEY ACHIEVEMENTS



**US\$ 5.7 Billion**

India has become the second largest market for e-learning after the US. The sector is currently pegged at **US\$ 2 billion** and is expected to reach **US\$ 5.7 billion** by 2020. The distance education market in India is expected to grow at a Compound Annual Growth Rate (CAGR) of around **11%** during **2016-2020**.

## IMPORTANT STATS

### TOTAL PLAYERS

Of the total **1.5 million** schools, **1.1 million** are run by the government. India is host to **751 universities** and over **35,539 colleges**.

### MERGERS AND ACQUISITIONS

Mergers and acquisition activity in the education space has seen **16 deals** so far this year valued at **\$47 million**.

### KEY DETERMINANT

FDI inflow into the education sector stood at **US\$ 1.42 billion** from April 2000 to March 2017.

## FUTURE OUTLOOK

The Indian education market is expected to almost double to **\$180 billion** by 2020. TalentSprint, a skill development company based in Hyderabad, has announced the launch of 'SmartCampus', where it plans to skill around **1 million** people in the areas of IT and banking by the year 2020.

## NORTHEAST REGION SCENARIO

NER (I) is endowed with rich biodiversity and natural resources. The literacy rate in many of these states is above the rest of the country. Skilled human resources to exploit the local resources, if developed, such as tea, timber, tourism, oil, coal and bio-resources, offer immense potential for the economic progress of the region. It is needless to mention that quality higher education is pre requisite for creation and development of skilled human resources. Quality higher education, thus especially in north eastern region will help to circumvent the natural resource constraints and creation of knowledge infrastructure towards self-empowerment of the people. In the N.E.

India most of the Colleges have initiated new courses such as BBA, BCA, Travel & Tourism, Sericulture, Environmental science etc. in addition to regular bachelor programs on self-Financing basis. Even in universities also various professional courses have been introduced in addition to the general academic courses. It is positive symptom for the Higher Educational institutes of this region.

