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ATIM World Services Sector Report

BPM6-09 – Telecommunications, Computer and Information Services

Prepared using the

ATIM (Aggregated Trade Intelligence Model) methodology

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ATIM Service Reports can be produced for 52 countries and territories with detailed service-sector coverage across 13 service sectors.

Aggregate trade-in-services statistics are also available for a further 152 countries and territories.

Together, these resources create a highly flexible trade-intelligence capability supporting market, service-sector, country, trade-corridor, and trade-bloc analysis.

These reports are designed to:

- **identify international markets and service sectors of interest;**
- **support benchmarking, market evaluation, and opportunity identification activities; and**
- **indicate practical trade-development next steps.**

Supporting methodology, trade-flow tables, classification resources, and related reference materials are available through the [ATIM Resource Library](#).

For more information see: [ATIM Report Types and Applications](#).

(Multilingual versions available on request.)

About This Report

Purpose

ATIM Service Trade Reports are designed for organisations supporting international trade-development.

This report provides structured trade intelligence relevant to:

- **Global Telecommunications, Computer and Information Services trade**

Application

The report combines international trade analysis, market rankings, growth indicators, concentration measures, and service-sector references.

The objective is to provide structured trade intelligence that supports market review, comparative assessment, and trade-development activities.

Practical Use

The report has been designed to help organisations identify markets, service sectors, trade corridors, and areas of potential commercial interest that may warrant further investigation.

The information presented can support prioritisation, planning, and the identification of opportunities for subsequent review and assessment.

However, identifying service sectors of interest is often only the first step. Practical follow-up frequently requires those service sectors to be linked to the industries associated with them. [ATIM Code Matching resources](#) provide that connection between service sectors identified within this report (BPM6 Revision Codes) and their associated industries (ISIC Codes).

The Optional Next Steps section provides access to additional analytical, reference, and trade-development resources.

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1. Executive Summary

This Executive Summary provides a consolidated overview of the principal trade volumes, growth indicators, concentration measures, and comparative references presented within the report.

1.1. International ICT Services Trade Scale and Growth

The following indicators provide a summary of global ICT Services trade activity.

Global Trade Volumes (2024)

	USD bn	% Globally Traded Service	World Sector Rank
Global Service Trade	8,805.45		
Global ICT Services exports	1,241.72	14.10%	3/13

Global Export Growth

Exports	YoY Growth 2023-24	CAGR 2020-24
Global Service Export Trade	9.33%	13.20%
Global ICT Services Export Trade	10.35%	10.99%

1.2 Trade Concentration Indicators

The first figure indicates the number required to exceed the concentration threshold. The second figure indicates the total included in the analysis.

Global ICT Services Trade Concentration

	50% Threshold	% ICT Services Global Trade
Exporting Countries	5/128	53.84%
Importing Countries	9/133	51.54%
ICT Categories	1/3	81.37%

1.3 Summary Observations

The Summary Observations section highlights the principal trade, growth, concentration, and market indicators presented within the report.

It also outlines how these indicators can support market assessment, trade-development activity, and the identification of areas warranting further exploration.

Illustrative Considerations provide additional context to assist organisations in determining how the information presented can be applied within their own circumstances.

The significance and application of the information presented will depend, however, upon the objectives, capabilities, priorities, and circumstances of the organisation using the report.

1.4 Optional Next Steps

The Optional Next Steps section provides access to additional analytical, reference, and trade-development resources to support any subsequent actions the organisation chooses to undertake.

2. Introduction

This report provides structured international trade information relating to:

- **Global Telecommunications, Computer and Information Services trade**

Terminology: Throughout this report, the term **ICT Services** refers to:

BPM6 09 – Telecommunications, Computer and Information Services.

The abbreviated term ICT Services is used throughout the report for ease of reference.

Included within the report are international trade volumes, market rankings, growth benchmarks, service-sector references, and comparative trade information relevant to the report scope.

The analysis is designed to:

- provide international trade statistics and comparative trade references;
- identify markets, countries, and trade corridors of potential interest;
- identify service sectors, concentration patterns, and growth benchmarks; and
- support market review, opportunity identification, and trade-development activities.

BPM6 Revision service-sector code references are incorporated throughout the report to support review of global service activity and structure.

Comparative growth and trade benchmarks are used throughout the report to support market and service-sector review. Unless otherwise indicated, comparative growth and trade benchmarks are weighted by relative trade value.

2.1 Sector Mapping

To support interpretation and practical follow-up, ATIM provides **BPM6 Revision–ISIC alignment resources** that help connect service classifications with industry-sector classifications.

These resources help organisations link service sectors identified within the report to the industries, sectors, and economic activities associated with them.

2.2 Supporting Resources

The ATIM Resource Library provides access to methodology notes, benchmarking references, classification resources, and related analytical materials.

[Downloadable Trade Flow Tables](#) are also available through the [ATIM Resource Library](#).

The downloadable XLSX Trade Flow Tables provide access to the data presented in this report together with additional rankings, statistics, and trade-flow references.

2.3 Uses of This Report

The report supports a range of international trade-development, export-promotion, market-assessment, and market-development activities.

It can assist organisations in:

- benchmarking and comparative market assessment;
- sector-focused trade intelligence and market review;
- export-promotion and trade-development activities;
- market and partner identification; and
- international engagement and relationship-development activities.

2.4 Interpretation and Application

The report provides trade statistics, comparative references, growth indicators, concentration measures, and supporting resources.

Interpretation of the information presented, and any actions arising from it, will depend entirely upon the objectives, capabilities, priorities, and circumstances of the organisation using the report.

As a result, different organisations will reach different conclusions and pursue different courses of action based upon the same information.

For this reason, the report does not make judgements, recommendations, or prioritisation decisions on behalf of the organisations using it.

2.5 Scope of the Analysis

This report primarily provides macro-level trade, market, sector, and international trade-structure analysis.

The analysis does not incorporate:

- the number of companies active within specific service sectors;
- the relative participation of SMEs and large enterprises;
- ownership composition; and
- detailed company-level analysis.

Some country, bilateral, and service-sector datasets may not be available for identical reporting periods. Where this occurs, the latest available reporting period has been used and is identified within the relevant tables or sections.

As a result, the report should not be interpreted as a detailed industry or company-structure assessment.

Notes For Readers

1. Unless otherwise indicated, countries, economies, and international markets are generally presented in approximate order of relevance to the report scope.
2. Additional trade statistics and rankings are available as downloadable XLSX files through the ATIM Resource Library's [Global Trade Flow Tables](#).
3. International trade statistics may differ between reported import and export figures.

3. Global ICT Services Trade Overview

This section provides a high-level overview of global ICT Services trade activity.

The analysis includes trade volumes, growth benchmarks, and concentration indicators relating to international markets and service sectors.

3.1 Global Trade Activity

The following tables provide summary indicators relating to the scale, growth, and structure of global ICT Services trade activity.

These indicators provide a foundation for subsequent review of international market rankings, trade concentration, service-sector composition, and comparative sector performance.

Global Trade Volumes

	USD bn	% Globally Traded Service	World Sector Rank
Global ICT Services exports	1,241.72	14.10%	3/13

Table 3.1.1 ICT Services Global Trade Volumes

Global Export Growth

Exports	YoY Growth 2023-24 ¹	CAGR 2020-24
Global Service Trade	9.33%	13.20%
Global ICT Services	10.35%	10.99%

Table 3.1.2 Export Growth 2024

3.2 Market Concentration

The following tables provide comparative references relating to market concentration across exporting economies, importing economies, and service categories.

These analyses highlight concentration patterns within global service trade activity relating to the report scope.

¹ Growth Tables:

- YoY (Year-on-Year) growth measures annual change.
- CAGR (Compound Annual Growth Rate) measures medium-term growth

Global Exporting Country Concentration

Rank	Exporting Country	% ICT Services Global Exports	USD bn
1	Ireland	23.81%	295.62
2	India	9.90%	122.88
3	China	8.08%	100.28
4	United States	7.31%	90.78
5	United Kingdom	4.74%	58.83
	Totals	53.84%	668.39

Table 3.2.1 ICT Services Global Exporting Country Concentration 2024

Global Service Category Export Concentration

Service Code	Category Description	% Global ICT Services Exports
9.2	Computer services	81.37%
9.1	Telecommunications services	10.83%
9.3	Information services	7.81%

Table 3.2.2 Global Service Category Export Concentration

The concentration indicators above relate to export-market activity and BPM6 service-category structure.

The following table provides corresponding references relating to import-market concentration.

Global Importing Country Concentration

Rank	Country	% Global ICT Services Imports	USD bn
1	United States	10.75%	72.63
2	Germany	9.68%	65.41
3	China	5.94%	40.15
4	France	4.96%	33.52
5	Singapore	4.82%	32.57
6	Netherlands	4.49%	30.33
7	Japan	4.27%	28.84
8	India	3.50%	23.67
9	Switzerland	3.13%	21.17
	Totals	51.54%	348.29

Table 3.2.3 ICT Services Global Importing Country Concentration

Together, these indicators provide comparative references relating to the scale, growth, and concentration of international service trade activity within the report scope.

The following sections build upon these indicators through more detailed review of export markets, import markets, service categories, and growth trends.

Notes For Readers

1. Additional trade statistics, rankings, and supporting trade-flow references are available as downloadable XLSX files through the ATIM Resource Library's [Global Trade Flow Tables](#).

4. Major ICT Services Export Markets

This section provides more detailed review of international export markets, growth trends, and service-category activity.

The analysis incorporates market rankings, growth benchmarks, service-category references, and comparative trade indicators.

4.1 Export Market Size & Growth

The following tables provide comparative references relating to the scale and growth performance of leading exporting economies.

Leading ICT Services Exporting Countries by Value.

The following table ranks countries by export value and relative share of global exports.

Rank	Country	World Share	USD bn
1	Ireland	23.81%	295.62
2	India	9.90%	122.88
3	China	8.08%	100.28
4	United States	7.31%	90.78
5	United Kingdom	4.74%	58.83
6	Germany	4.35%	54.01
7	Netherlands	3.95%	49.00
8	Israel	2.80%	34.75
9	Singapore	2.48%	30.80
10	France	2.40%	29.74
	Totals	69.82%	866.69

Table 4.1.1 Leading ICT Services Exporting Countries By Value

Leading ICT Services Exporting Countries by YoY Growth

Export Growth YoY Benchmarks (2023-24):

Global service export growth	9.33%
Global ICT Services export growth	10.35%

Rank	Country	YoY	Benchmarks	USD bn
1	Mexico	47.86%	▲ ▲	1.58
2	Viet Nam	39.07%	▲ ▲	2.32
3	Indonesia	35.56%	▲ ▲	3.76
4	Pakistan	33.63%	▲ ▲	3.63
5	Finland	22.73%	▲ ▲	13.64
6	Colombia	22.65%	▲ ▲	2.00
7	Slovakia	22.47%	▲ ▲	2.65
8	Hungary	21.76%	▲ ▲	4.32
9	Serbia	20.30%	▲ ▲	4.47
10	Ireland	19.71%	▲ ▲	295.62

Table 4.1.2 Leading ICT Services Exporting Countries by YoY Growth (2024–25)

Where:

- first icon = growth compared to Global service benchmark;
- second icon = growth compared to ICT Services benchmark.

▲ indicates above the benchmark

▼ indicates below benchmark

▶ indicates equal to the benchmark

While the table above highlights short-term YoY growth, the next table shows longer-term CAGR growth patterns.

Leading ICT Services Exporting Countries by CAGR Growth

Export Growth CAGR Benchmarks (2020-24):

Global service export growth	13.20%
Global ICT Services export growth	10.99%

Rank	Country	CAGR	Benchmarks	USD bn
1	Colombia	39.00%	▲ ▲	2.00
2	Armenia	37.69%	▲ ▲	1.18
3	Estonia	32.40%	▲ ▲	3.47
4	Indonesia	31.02%	▲ ▲	3.76
5	Serbia	28.49%	▲ ▲	4.47
6	Viet Nam	27.50%	▲ ▲	2.32
7	Lithuania	26.49%	▲ ▲	2.77
8	Brazil	24.72%	▲ ▲	6.17
9	Türkiye	23.12%	▲ ▲	4.86
10	Bulgaria	21.38%	▲ ▲	4.37

Table 4.1.3 Leading ICT Services Exporting Countries by CAGR Growth (2020-24)

The next section provides corresponding international import statistics, rankings, growth indicators, and comparative market references.

5. Major ICT Services Import Markets

Further to the indicators presented in Section 3, the following tables provide more detailed import-market and growth analysis.

5.1 Import Market Size & Growth

Leading ICT Services Importing Countries by Value.

The following table ranks countries by import value and relative share of global ICT Services imports.

Rank	Country	World Share	USD bn
1	United States	10.75%	72.63
2	Germany	9.68%	65.41
3	China	5.94%	40.15
4	France	4.96%	33.52
5	Singapore	4.82%	32.57
6	Netherlands	4.49%	30.33
7	Japan	4.27%	28.84
8	India	3.50%	23.67
9	Switzerland	3.13%	21.17
10	Belgium	3.09%	20.86
	Totals	54.63%	369.15

Table 5.1.1 Leading ICT Services Importing Countries by Value

Leading ICT Services Importing Countries by YoY Import Growth

Import Growth YoY Benchmarks (2024–25):

Global service import growth	7.15%
Global ICT Services import growth	7.27%

Rank	Country	YoY Growth	Benchmarks	USD bn
1	Egypt	79.62%	▲ ▲	1.49
2	United Arab Emirates	55.88%	▲ ▲	6.95
3	Ireland	48.82%	▲ ▲	20.85
4	Slovakia	33.37%	▲ ▲	1.94
5	Qatar	33.18%	▲ ▲	2.21
6	Lithuania	30.24%	▲ ▲	1.58
7	Greece	28.22%	▲ ▲	1.29
8	Hungary	24.68%	▲ ▲	3.41
9	Thailand	23.33%	▲ ▲	1.22
10	Poland	21.77%	▲ ▲	13.42

Table 5.1.2 Leading ICT Services Importing Countries by YoY Import Growth (2024–25)

While the previous table highlights shorter-term import growth performance, the following table presents longer-term CAGR growth rankings for leading importing countries.

Leading ICT Services Importing Countries by CAGR Import Growth

Import Growth CAGR Benchmarks (2020-24):

Global service import growth	12.22%
Global ICT Services import growth	9.34%

Rank	Country	CAGR	Benchmarks	USD bn
1	Malta	45.62%	▲ ▲	1.19
2	Lithuania	29.78%	▲ ▲	1.58
3	Poland	23.12%	▲ ▲	13.42
4	Brazil	22.26%	▲ ▲	13.33
5	Cyprus	21.16%	▲ ▲	6.46
6	India	21.10%	▲ ▲	23.67
7	Saudi Arabia	18.55%	▲ ▲	2.71
8	Peru	18.47%	▲ ▲	2.27
9	Ukraine	18.47%	▲ ▲	1.11
10	South Korea	17.76%	▲ ▲	11.76

Table 5.1.3 Leading ICT Services Importing Countries by CAGR Import Growth (2020-24)



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The following section, Summary Observations, highlights the principal indicators presented within the report.

Optional Next Steps provides access to additional analytical, reference, and trade-development resources.

6. Summary Observations

6.1 ICT Services Trade Scale, Growth & Concentration in 2024

Note: Figures presented in this section may be rounded.

International Markets

- World ICT Services exports reached USD 1,242 billion.
 - This represents 14.1 % of global service exports.
 - World ICT Services exports increased by 10.4 % compared to 9.3% for the global service market.
 - Five exporting countries accounted for 54% of global ICT Services exports.
 - Nine importing countries accounted for 52% of global ICT Services imports.
 - One service category accounted for over 80% of global ICT Services exports.
-

6.2 From Market Patterns to Trade Activity

The information presented throughout this report can support the identification and assessment of markets, service sectors, trade corridors, and potential trade opportunities.

The specific actions undertaken, however, will depend on the objectives of the organisation concerned.

Such actions typically include identifying and assessing:

- markets, countries, and trade corridors of interest;
- service sectors of interest;
- market and service concentration patterns; and
- industry sectors, organisations, companies, and trade networks associated with any potential opportunities.

However, identifying service sectors of interest is often only the first step. Practical follow-up frequently requires those sectors to be linked to the industries associated with them.

ATIM [Code Matching resources](#) provide the connection between service sectors identified within this report (BPM6 Revision Codes) and their associated industries (ISIC Codes).

Illustrative Considerations

Before deciding what to do next, the following considerations provide a framework for further review and assessment.

1. Are there markets, countries or trade corridors of particular interest?
2. Do specific service categories, service sectors or related markets merit attention?
3. Does market or service concentration have commercial implications?
4. Can any potential opportunities identified be linked to industry sectors, organisations, companies, or trade networks of interest?

7. Optional Next Steps

The following resources provide access to additional analysis, research, guidance, and trade-development support.

They can support further review, assessment, planning, and trade-development activity.

7.1 Further Analysis & Research

Additional ATIM Reports

Additional ATIM reports can provide analysis relating to service sectors, countries, bilateral trade relationships, trade corridors, and international markets.

Examples include:

- Additional World Service Trade Reports covering specific BPM6 service sectors;
- Bilateral Service Trade Reports examining trade relationships between two countries;
- Country Service Sector Reports relating to specific countries and service sectors;
- Country Service Trade Reports covering all service sectors within a specific country;
- and
- Comparative market and trade-corridor analysis.

ExportersAlmanac Reference Resources

(Access to ExportersAlmanac resources is free of charge.)

In addition to general reference resources, guidance materials, and business-support content, the ExportersAlmanac also provides:

- Country Profiles provide general, economic, trade, and commercial reference information for 250 countries and territories worldwide.
- International Industry Profiles provide access to business networks, international trade associations, industry directories, trade events, and related sector information.

ATIM Resource Library

The ATIM Resource Library provides access to methodology references, downloadable XLSX Trade Flow Tables, classification resources, and related analytical materials.

The downloadable Global Trade Flow Tables contain the data presented in this report together with additional rankings, statistics, and trade-flow references.

These resources support more detailed review and analysis.

Code Matching Resources

ATIM Code Matching resources provide downloadable HS–ISIC and ISIC–HS cross-mapping references.

These resources can support further investigation of service categories, industry sectors, and trade-development opportunities identified within this report.

7.2 Trade Development & Implementation

[Protegra Framework](#). Protegra illustrates how trade-development resources, services, and market-visibility capabilities can be coordinated within a structured trade-enablement framework.

While the framework itself is illustrative, a number of the resources and services referenced are available independently and can provide practical support.

For additional information about this report, [ATIM](#) and [Protegra](#), please contact:
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Disclaimer

This report has been prepared as a structured trade-intelligence and reference document using information derived from external trade, institutional, classification, and country-reference sources believed to be reliable at the time of preparation.

The report is intended solely for informational, analytical, institutional, and trade-development support purposes. It does not constitute:

- legal advice;
- financial advice;
- investment advice;
- commercial due diligence;
- market-entry advice;
- trade-compliance advice; or
- professional consulting services.

Trade statistics, classifications, institutional references, and country reference information can be subject to:

- reporting delays;
- revisions;
- methodological differences;
- differences in reporting practices between countries;
- data-availability limitations;
- classification changes; or
- source-specific adjustments.

Reporting periods may vary between countries, services, markets, and data sources. Where equivalent reporting periods are unavailable, the most recent available reporting period has been used.

International service trade statistics are frequently subject to greater estimation, revision, and methodological variation than service trade statistics. Users should therefore regard service trade statistics as indicative of market structure, scale, and trends rather than as precise measurements.

Although reasonable efforts have been made to support consistency and accuracy, no representation or warranty is made regarding:

- completeness;
- accuracy;
- reliability;
- current validity; or
- fitness for a particular purpose.

ATIM reports are intended to support structured trade intelligence, benchmarking, market review, sector review, trade-development analysis, and institutional engagement activities. They are not intended to function as:

- predictive forecasting systems;
- formal econometric models;
- investment-rating methodologies;
- competitiveness-certification frameworks; or
- definitive market-entry assessment models.

Industry-sector mappings, classifications, rankings, growth indicators, concentration measures, and trade-development references are intended solely to support preliminary review and analysis. They should not be interpreted as definitive assessments of commercial viability, competitiveness, regulatory suitability, procurement suitability, investment suitability, or market-entry feasibility.

Users of this report should undertake their own independent review, verification, and professional assessment before making commercial, financial, regulatory, investment, or operational decisions.

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Trade-development outcomes remain dependent upon sector conditions, competitiveness, operational capability, regulatory requirements, market-access conditions, institutional engagement, timing, and market-specific circumstances.

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