

HFS



**HFS
SPRING
SUMMIT**
New York | May 8-9, 2024

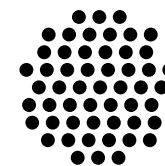
GenAI is Casting a Shadow Over All Other Emerging Technologies. Ignore Them at Your Peril.

Sponsored by:

May 9, 2024


PRESENTED BY:

Joel Martin, Executive Research Leader and CMT Industry Lead



Softtek®

What I did when I found I was running this breakout...




Summary: The Telecom, Media, and Technology (TMT) industry is experiencing significant digital transformation, with a focus on leveraging technologies like 5G, IoT, and automation to drive growth and enhance customer experiences. Companies in this sector are investing in operations transformation, strategic acquisitions, and partnerships to stay competitive and meet the evolving demands of the market. The industry is also prioritizing sustainability initiatives and diversification of the semiconductor supply chain to mitigate risks and drive global impact.

Example Questions:

- How is the TMT industry leveraging a combination of technologies like 5G, IoT, and edge computing to drive new business models and customer experiences?
- What are the key strategies being employed by companies in the media sector to optimize content distribution, scale through automation, and enhance business efficiency through data and insights?
- How are service providers in the TMT industry adapting to the shift towards annuity contracts, deep client partnerships, and the convergence of emerging technologies like 5G, automation, analytics, and cloud?

Ask

1 of 22 files: * WebsiteCoverPage_Humata.pdf



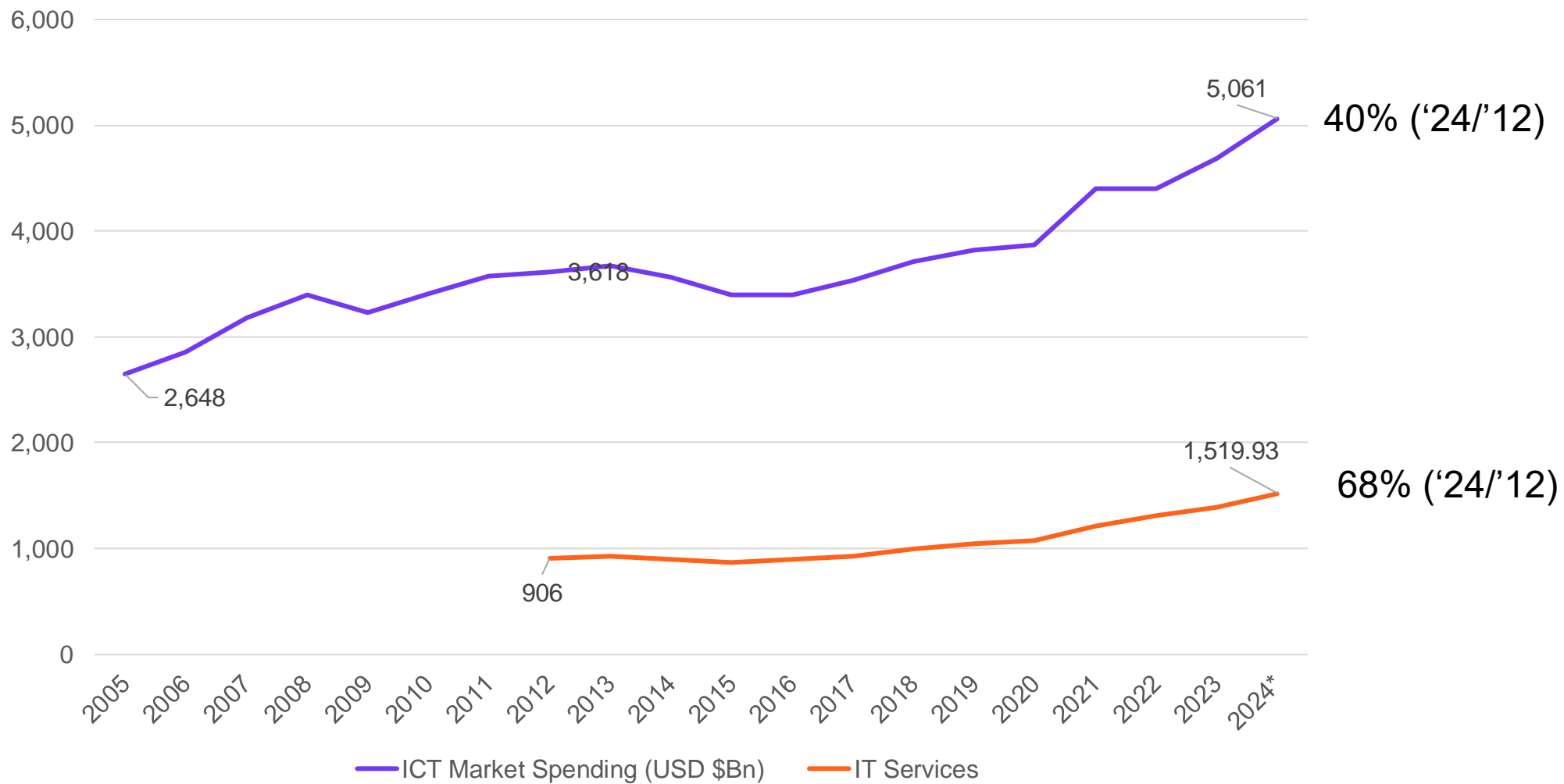
**Go ahead.
Ask a question.**

**We're revolutionizing the way
you access business research.**

We are at an inflection point in where silicon, data, and cloud are charting a new course for the market, empowering C&T firms to innovate, create, and deliver solutions.

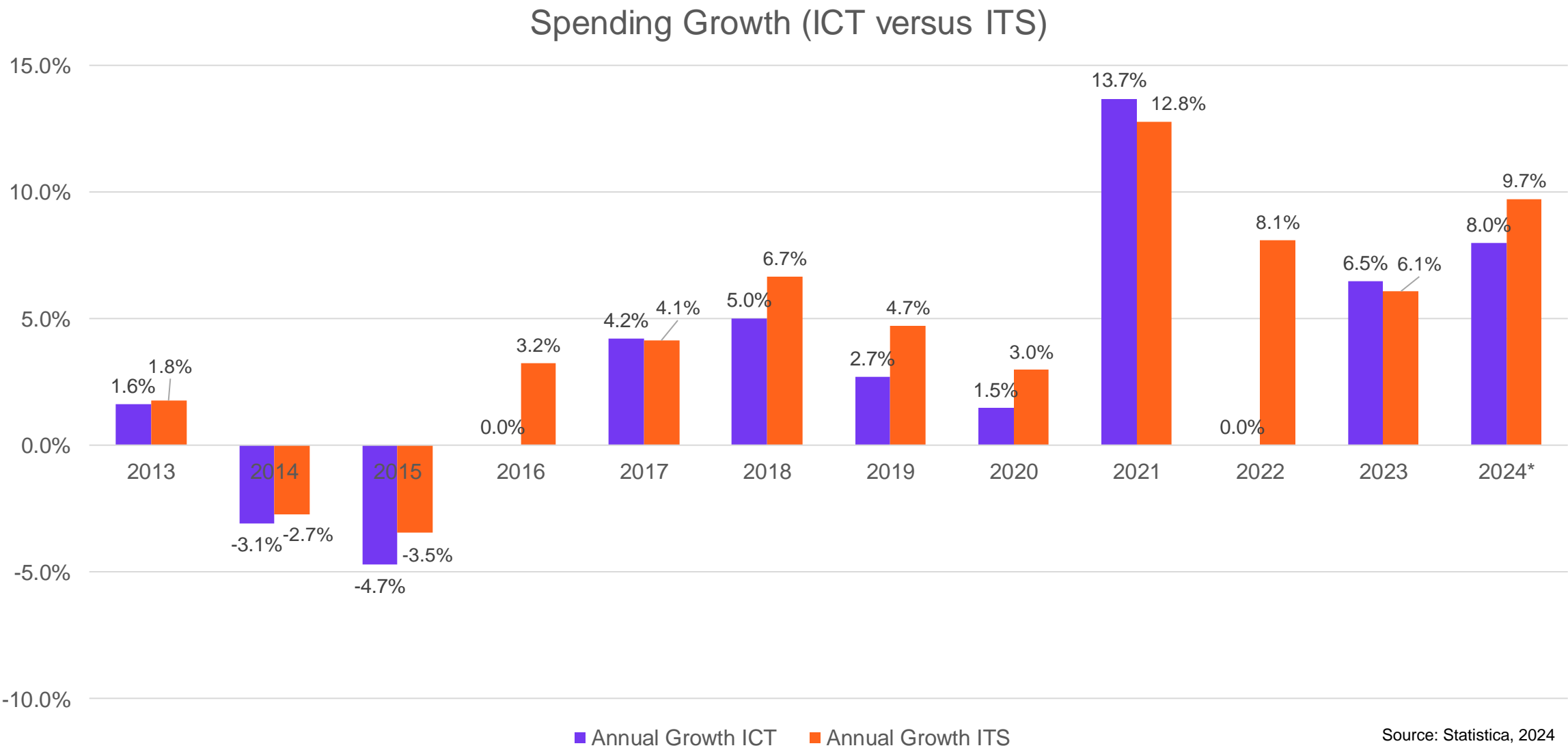


The ICT market continues to grow, weathering economic storms...



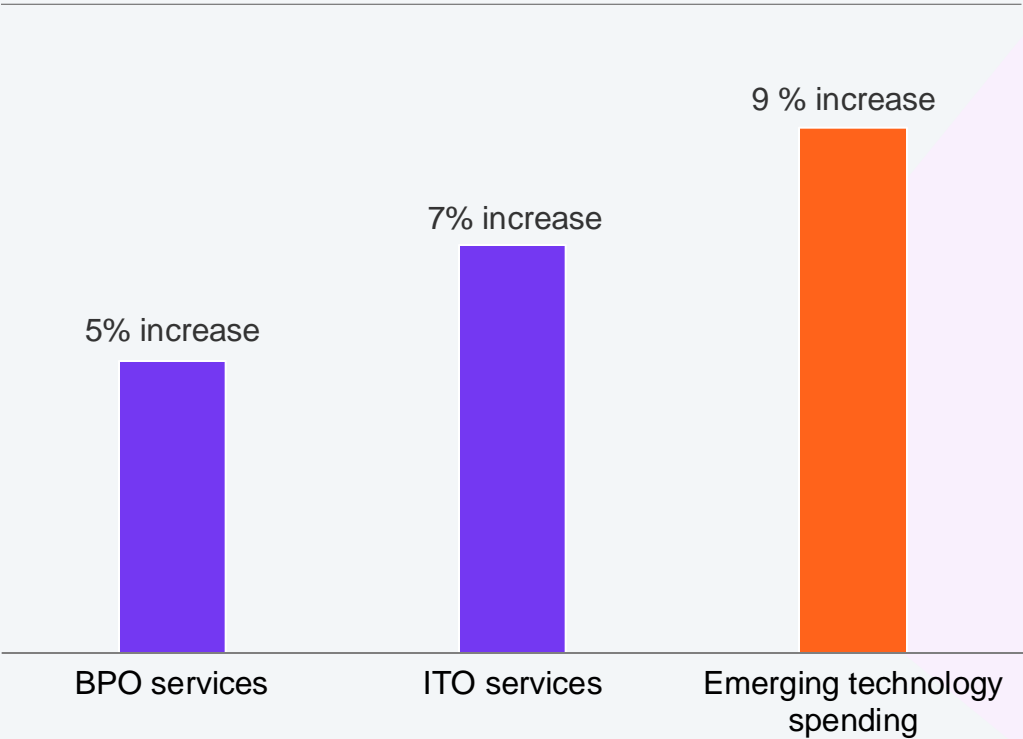
Source: Statista, 2024

Growth the past decade for ITS and ICT

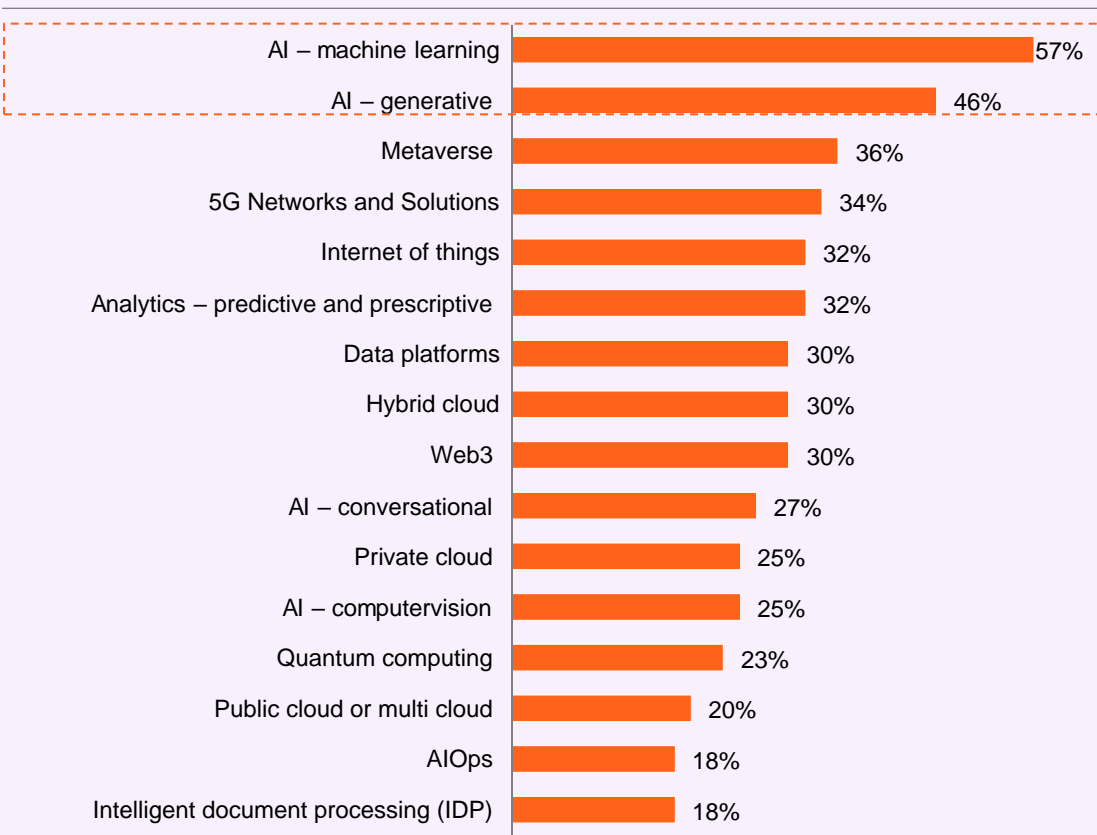


2024 labor-driven services growth is expected to be 5%, but AI-driven technology spending is expected to increase by 9% for C&T enterprise

How do you expect your enterprise spending across the following to change in 2024?



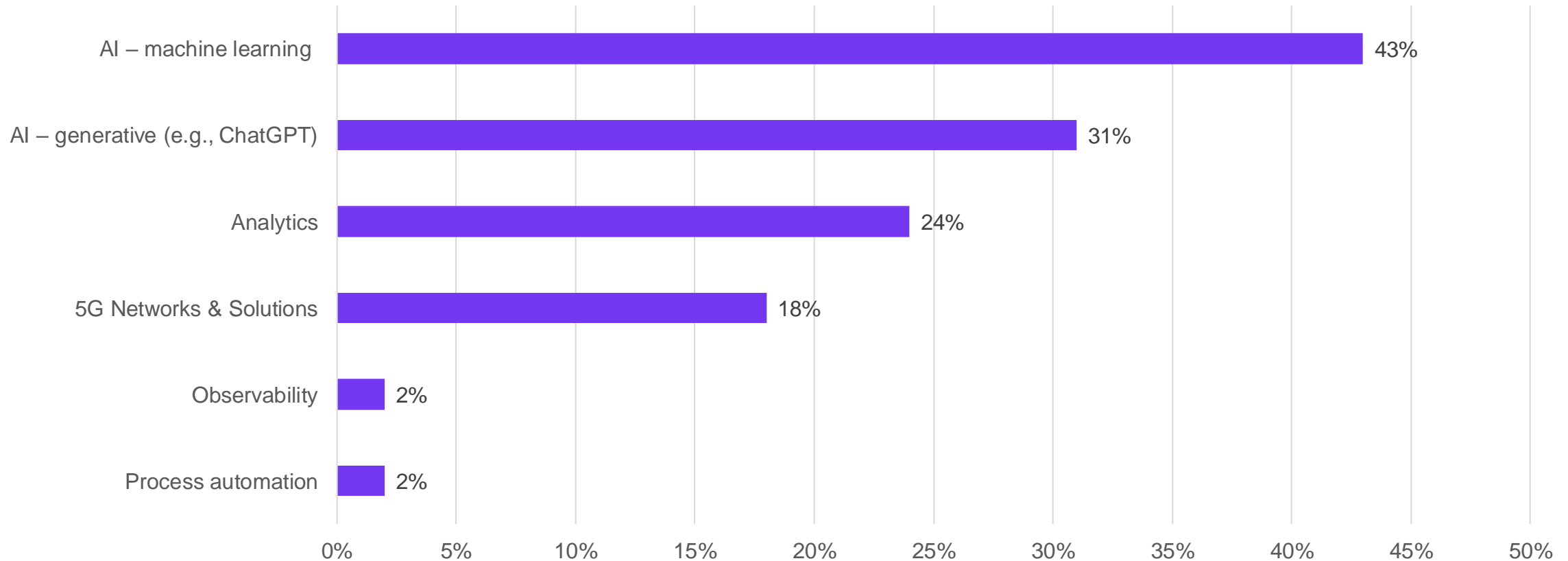
Which of the following enabling technologies are your organization actively investigating or working with?



Sample: HFS Pulse, 2024; 102 CMT global 2000 enterprise executives
Source: HFS Research, 2024

What are the emerging Technologies important to creating value in C&T firms?

Of the enabling technologies your firm currently uses, please rank the top three in terms of which provide the most value for your enterprise.



Sample: HFS Pulse, 2024; 102 CMT Firms, Global 2000 enterprise executives
Source: HFS Research, 2024

Let's talk about...

inten

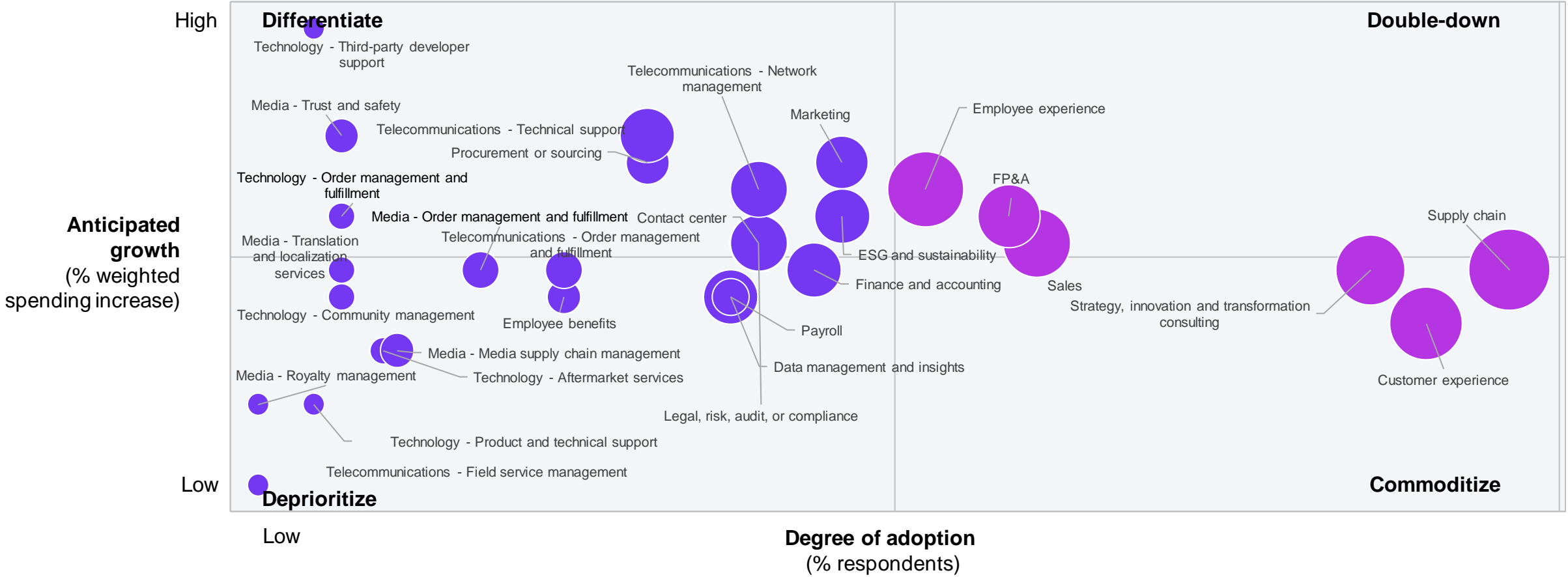
t



C&T firms seek partners ready to help them differentiate across their global supply chains, CX, and innovation efforts.

Enterprise adoption versus Growth of business services

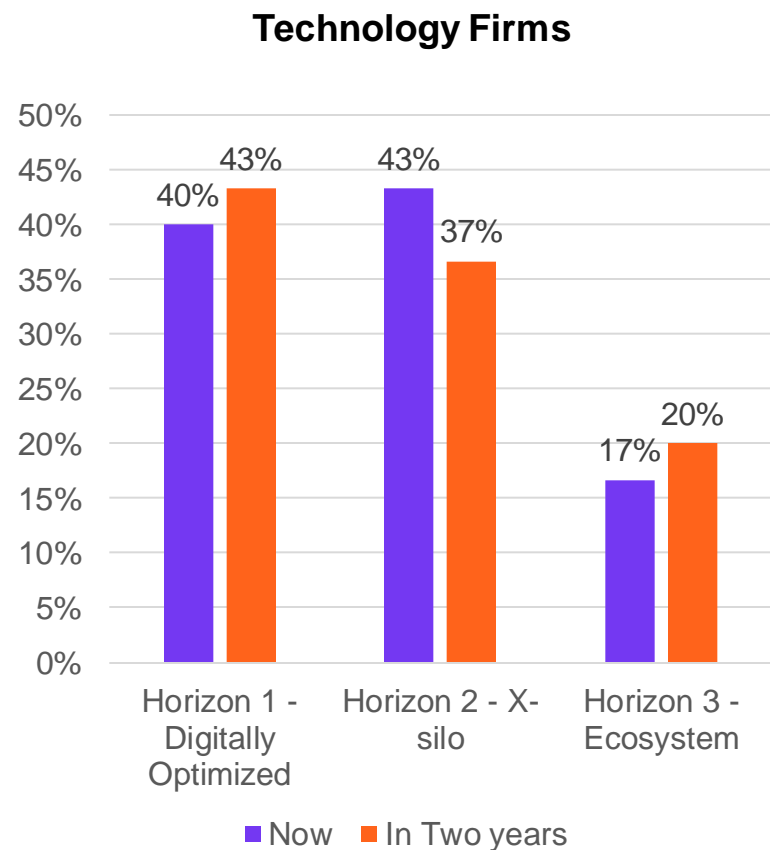
● Size of the bubble represents value potential



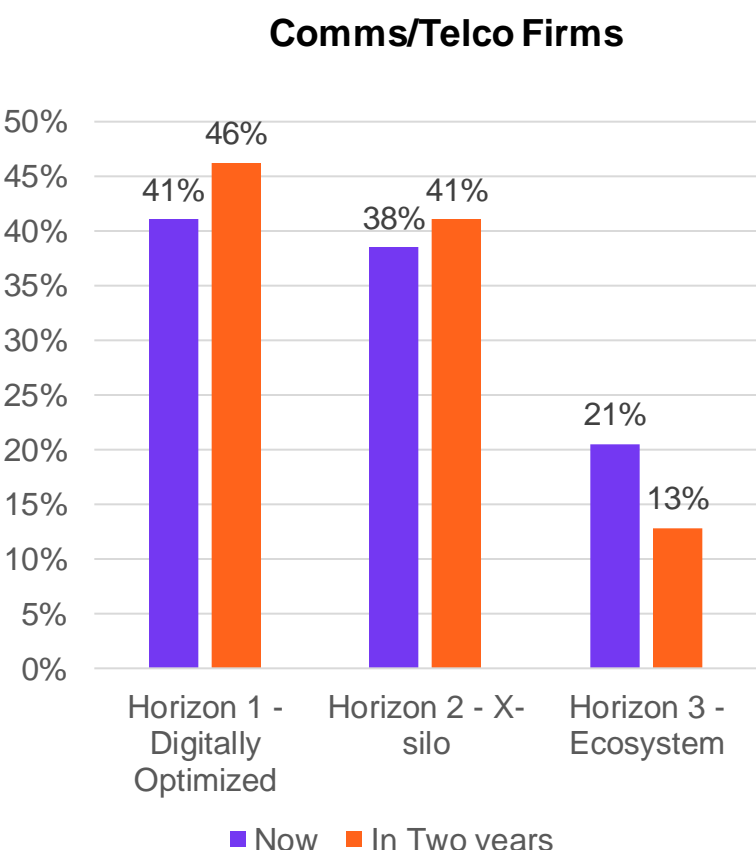
Sample: HFS Pulse, 2024; 68 TMC global 2000 enterprise executives
Source: HFS Research, 2024

Are C&T firms evolving towards Horizon 3 mentalities?

Please rank the following statements in terms of how well they reflect your firm’s enterprise innovation priorities



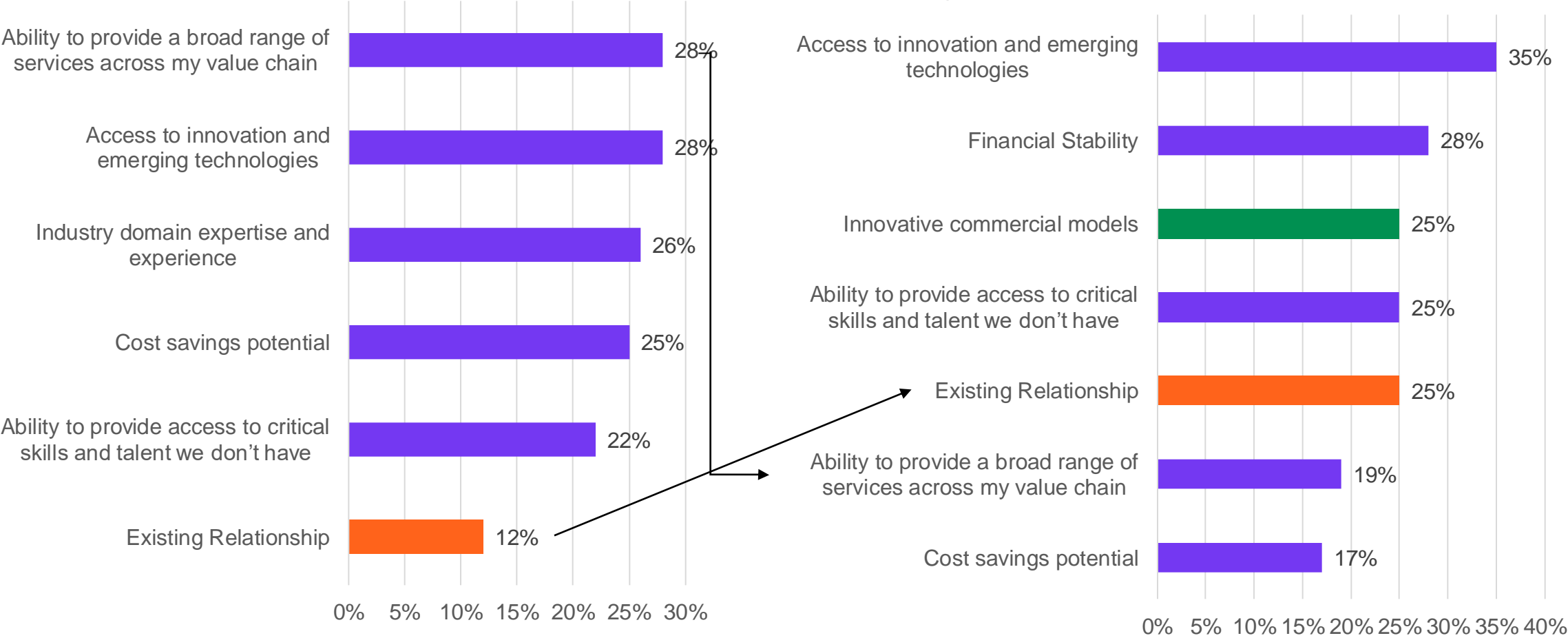
N=30 Global 2000 Technology Firms



N=39 Global 2000 Communications Firms

Partnering around how to get value from emerging tech continues to be increasingly important

How did you choose the IT services firm that your C&T firms is currently using? How will you choose your next partner?



Sample: HFS Pulse, 2024; 69 C&T Firms, Global 2000 enterprise executives
Source: HFS Research, 2024

About HFS

- **INNOVATIVE**
- **INTREPID**
- **BOLD**

HFS is a leading global research and analysis firm trusted at the highest levels of executive leadership. Our mission is to help our clients—major enterprises, tech firms, and service providers—tackle challenges, make bold moves, and bring big ideas to life by arming them with accurate, visionary, and thought-provoking insight into issues that impact their business.

Our analysts and strategists have deep, real-world experience in the subjects they cover. They're respected for their independent, no-nonsense perspectives based on thorough research, demand-side data, and personal engagements with industry leaders.

We have one goal above all others: to propel you to success.



www.hfsresearch.com



[hfsresearch](https://www.linkedin.com/company/hfsresearch)



www.horsesforsources.com