

HFS INDIA SUMMIT

**INDIA'S INNOVATION
ARBITRAGE
REVOLUTION**

THE PIVOTAL ROLE OF GCCS



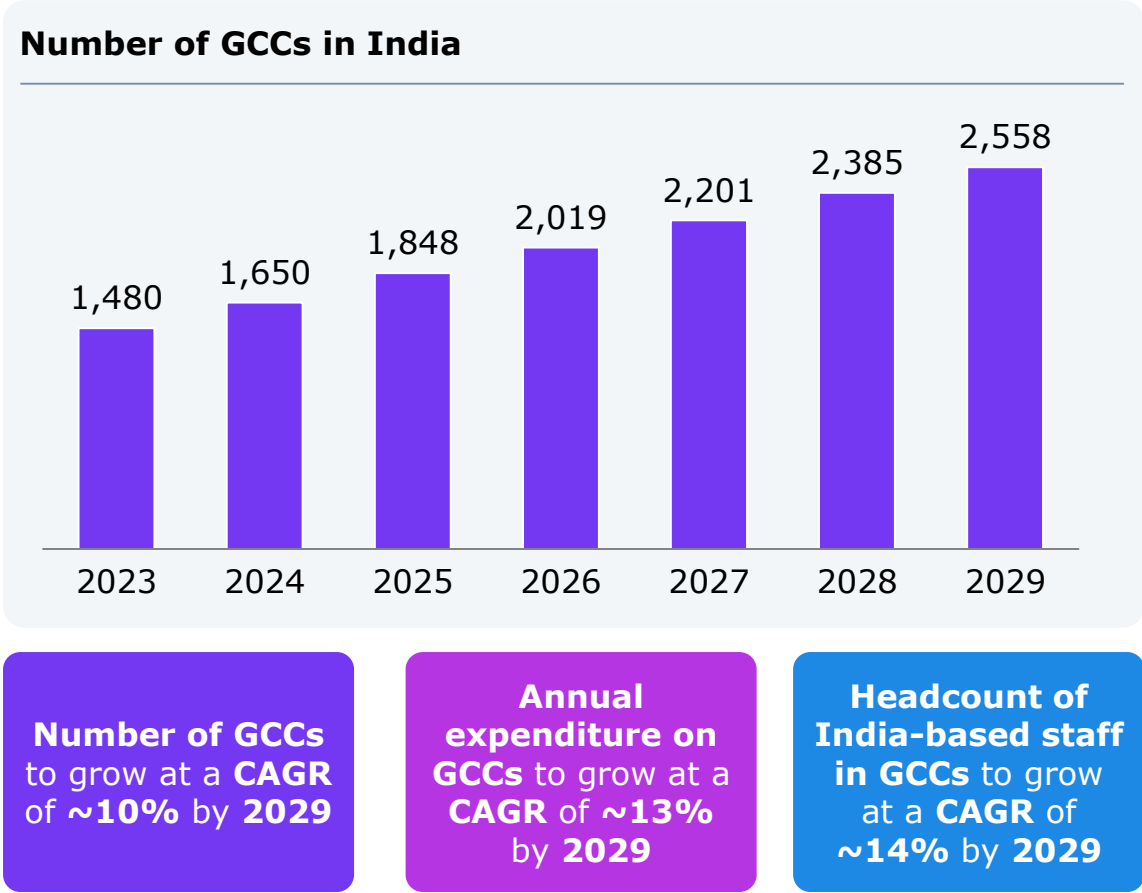
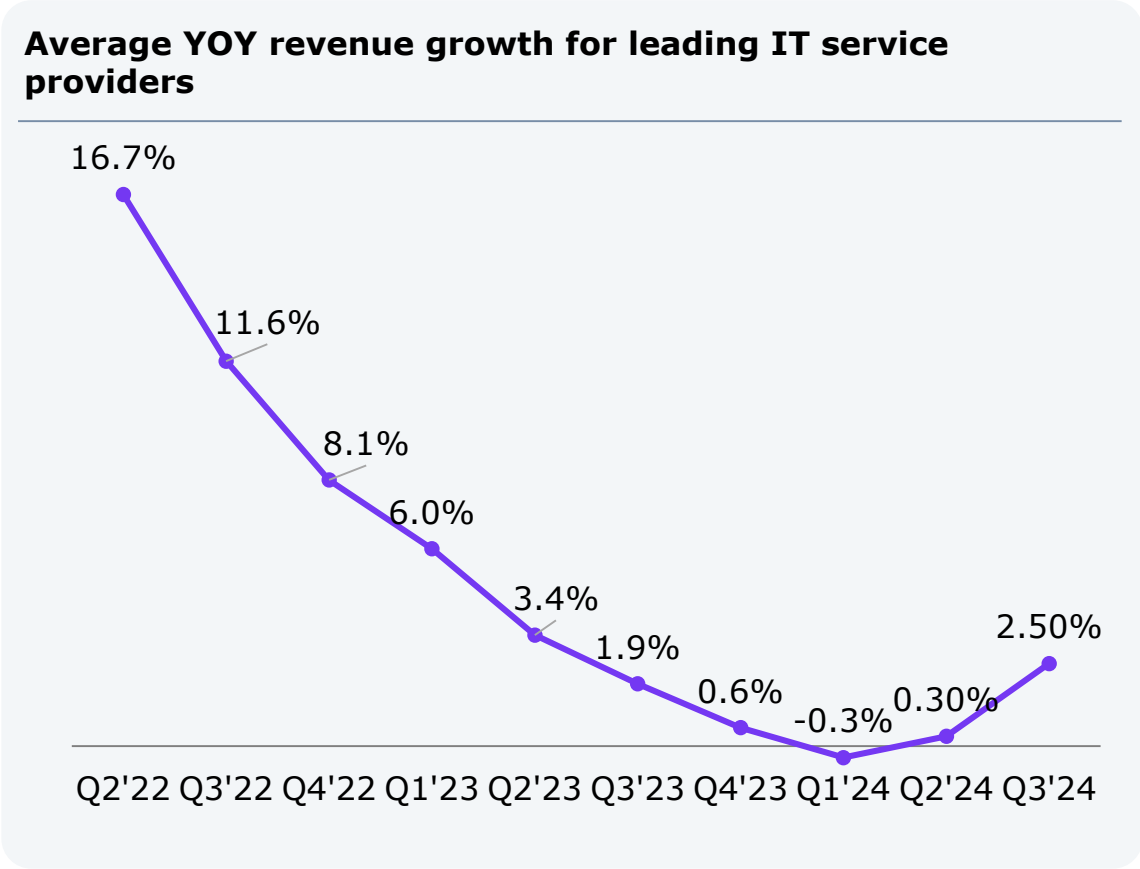
Saurabh Gupta

President, Research and Advisory Services, HFS Research

Do we really need a name tag?



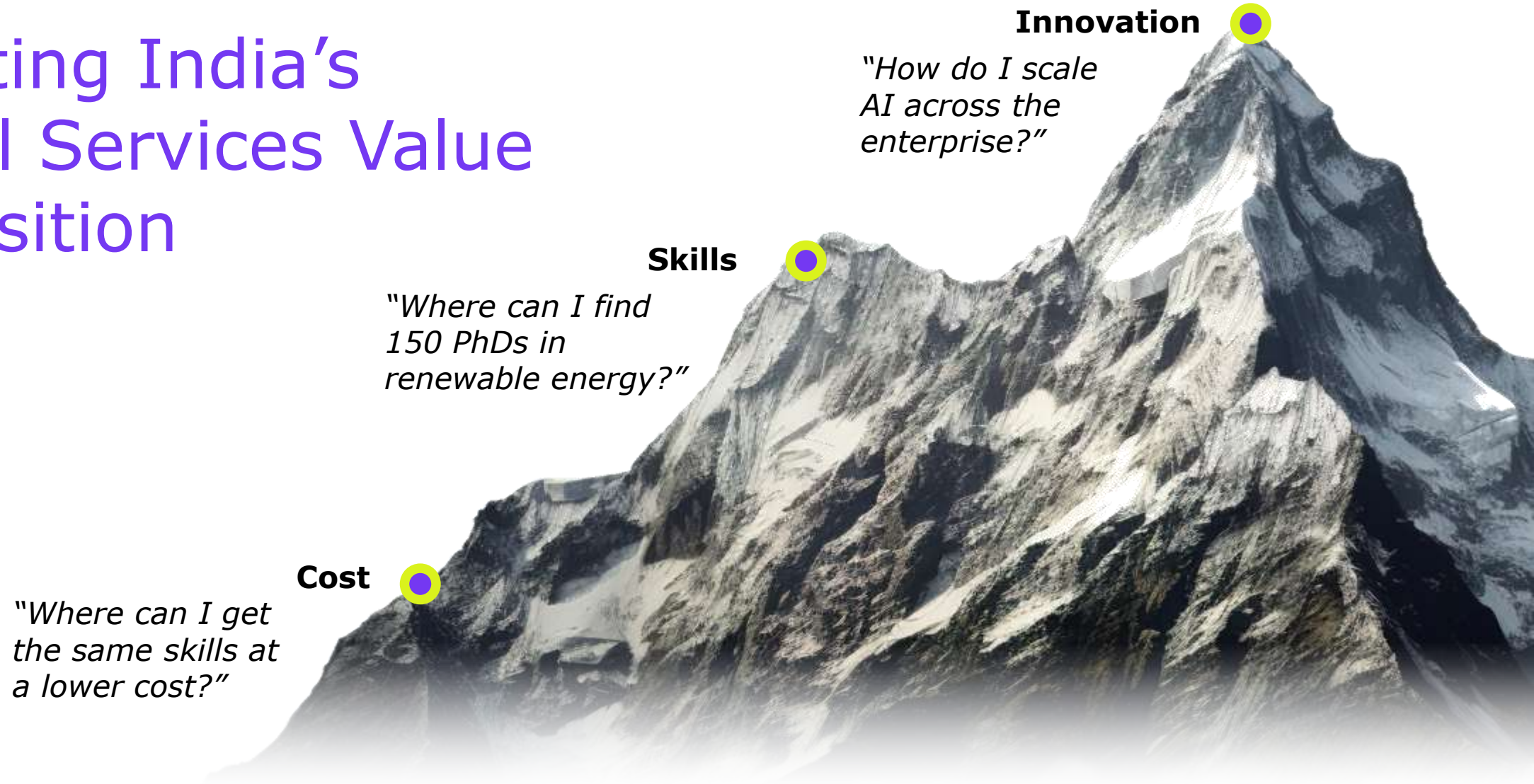
A tale of two cities | GCC growth story has displaced the 3rd party IT Services, especially in India



Source: Annual reports, HFS Analysis
Note: The chart is based on quarterly earnings statements of Accenture, Capgemini, Cognizant, HCLTech, IBM Consulting, Infosys, LTIMindtree, TCS, Tech Mahindra, Wipro. The quarters considered are based on the calendar year.

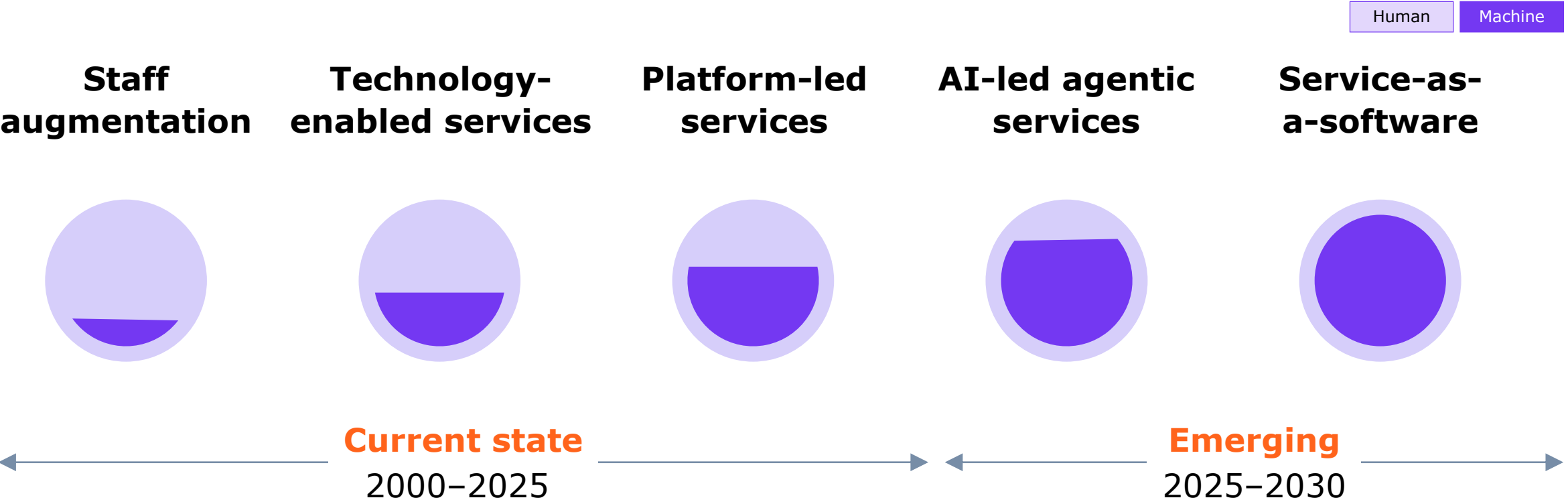
GCCs

Elevating India's Global Services Value Proposition



But in a future where services are consumed as software, can GCCs afford to rest on their laurels?

HFS Tech Services Vision 2030



AI: The Double-Edged Sword

Boom or Bust for GCCs?

OPPORTUNITY

Personalization



Predictive



Productivity



THREAT

Job Displacement



Services Disruption



AI Dominance



64%

36%

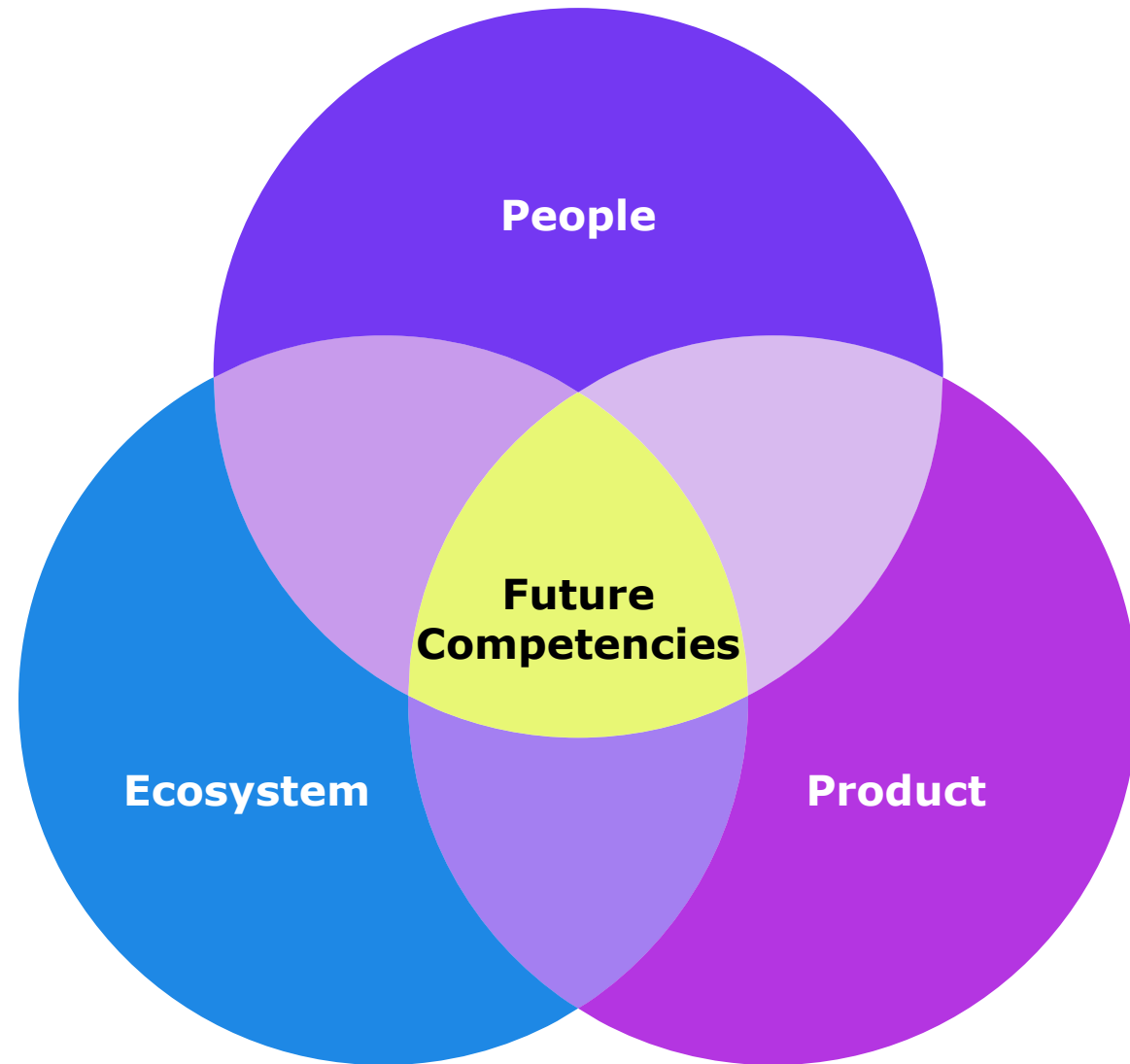
6 out of 10 enterprises expect to replace human-based services with AI by 2030

The Talent Conundrum



New Competencies

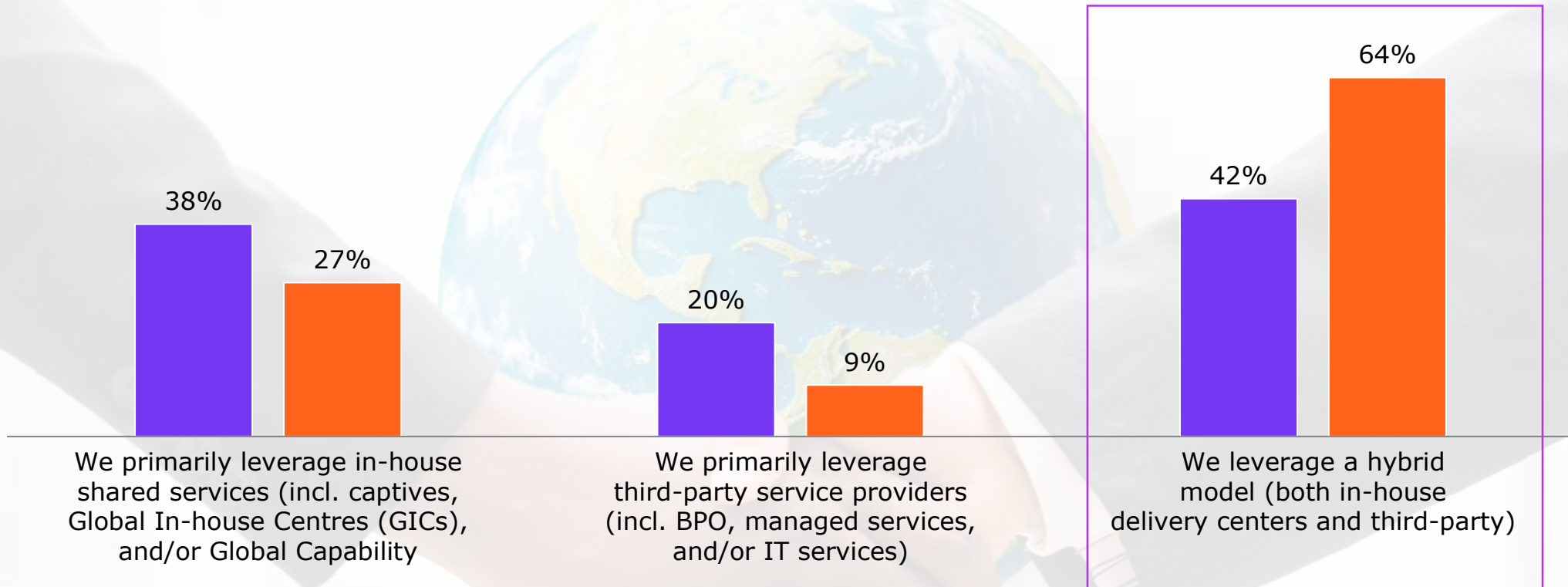
Beyond People Management, Product and Ecosystem management are the new must-haves



Us vs. Them: A Pointless Debate?

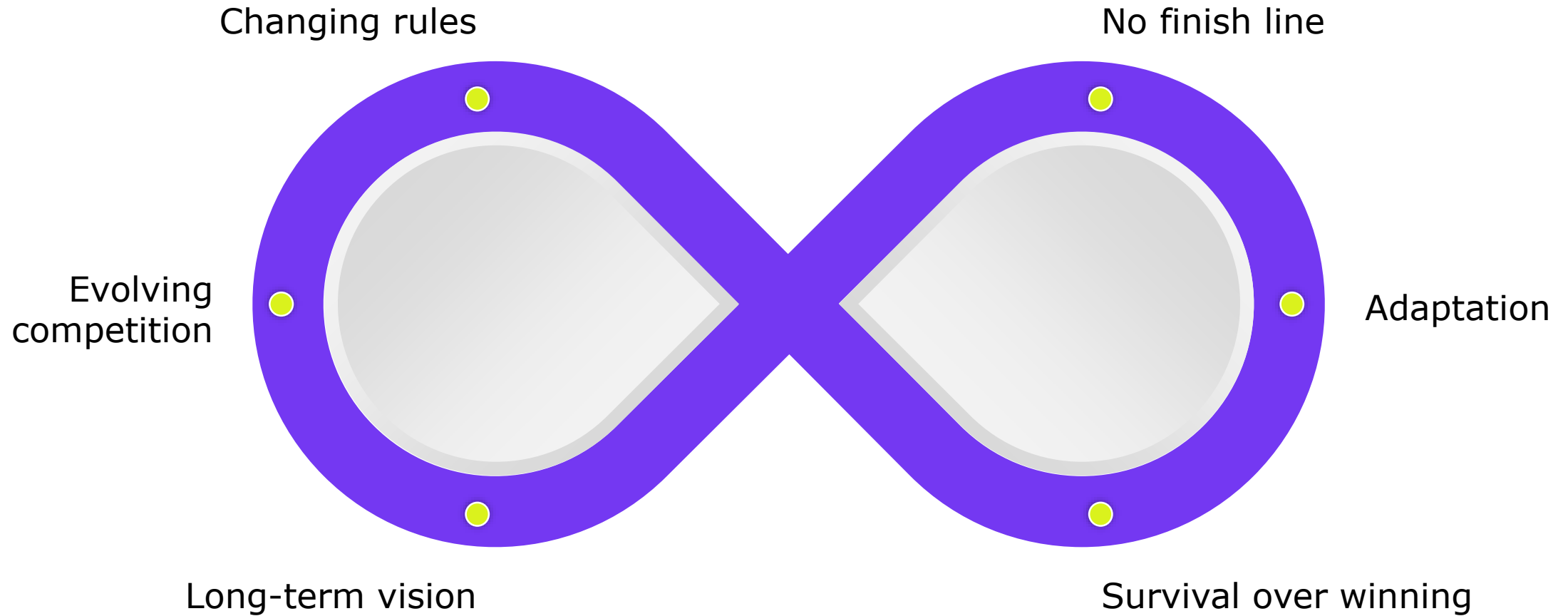
■ All enterprises

■ Enterprises that started their GBS journey 15+ years ago



Source: HFS Research, 2024
Sample: 510 GBS Leaders

The Infinite Leadership Mindset



GCCs in the Next Decade

New plumbing, not just fresh paint



Agenda highlights

- HFS 2030 Vision for the Future of Services and India's role in it: We must fight our FOBO, Fear Of Becoming Obsolete
- Leadership Panel: Is India Still the Center of the Global Services Universe?
- How will the state of Karnataka go about hitting its target of 500 new GCCs by 2029
- Creating shareholder value in GCCs
- How to Make IT Services Cool for India's Top Talent
- AI: Boom or Bust for Indian IT Services?
- Family Feud: GCCs vs Third-Party Providers: The Ultimate Showdown
- Fireside chats with C-suite leaders
- Networking, great food, and more

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Thank you.

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