

Capitalizing on the promise of Generative Al

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We are galloping towards an 'Al everywhere' future

Al Journey

From narrow to widening AI

Intelligence Architecture

A data-centric platform underpinning the enterprise

Digital Operations at Scale

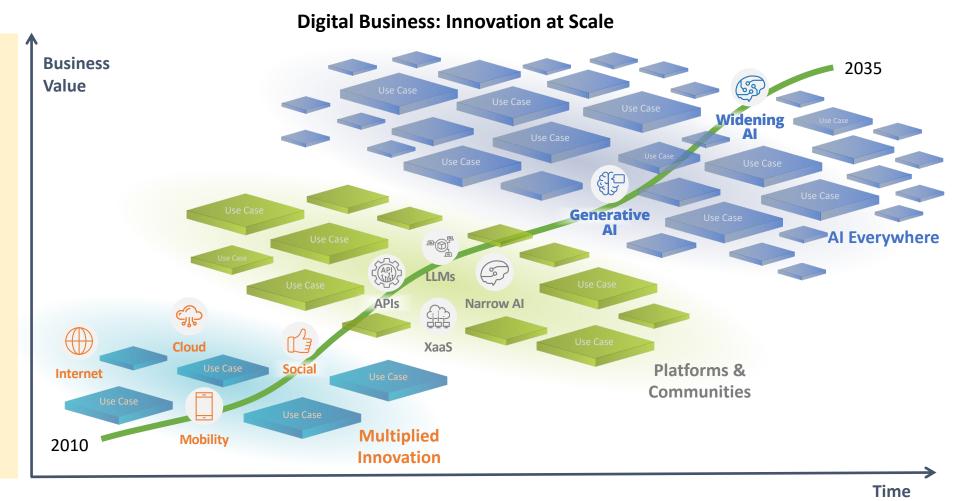
Cost-effective digital infrastructure for AI workloads

Skills

Attracting and reskilling talent for transformed work models

Trust

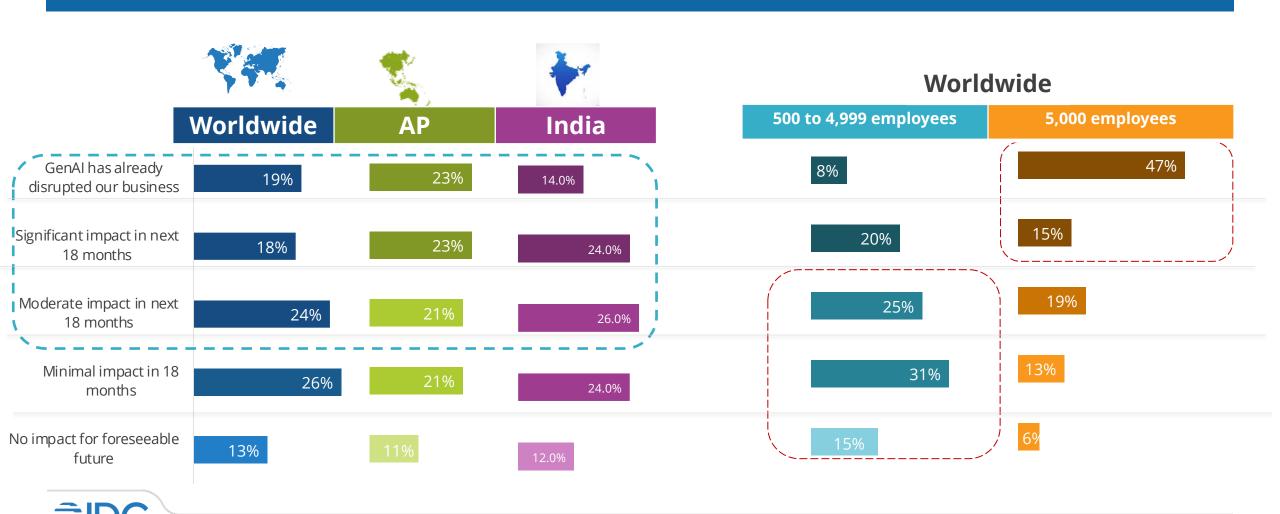
An upfront focus on trust



India AI market spend stands at \$1.7* Bn in 2023 and estimated to reach \$5.1 bn by 2027, at a CAGR of 31.6%.

Businesses seem to acknowledge its widespread impact

We asked if Organisations believe Gen AI will disrupt their competitive position or business operating model in the next 18 months...



Interestingly the response is muted, so far!

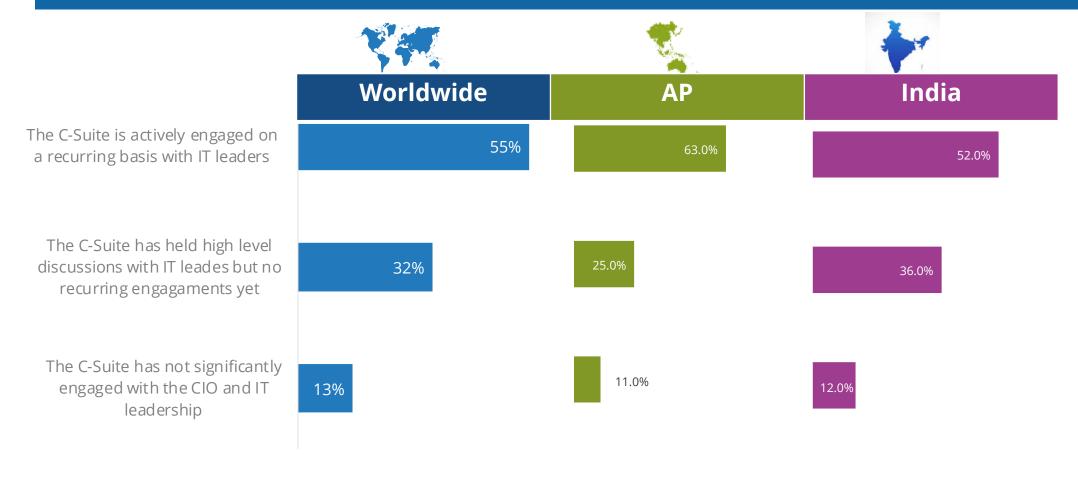
What is your organization's current state of evaluating or using Generative AI (GenAI)?

	Worldwide	АР	India
We are already investing significantly in Generative AI with an established spending plan for training, acquiring Gen AI enhanced software, and consulting services in next 18 months.	21%	25%	10%
We are doing some initial testing of models and focused proofs of concept (PoC) but don't have a set spending plan in place.	27%	27%	20%
We are developing a list of potential use cases but are not yet investing in technology or model building	32%	29%	3
We are not doing anything yet.	19%	19%	329



We expect this to change, given C-suite involvement

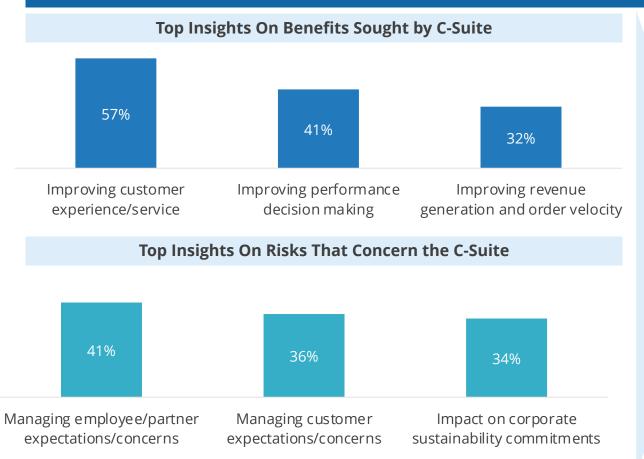
Which of the following statements best describes the level of engagement that your C-Suite has with your CIO and the IT team on the business benefits and risks as well as IT implications of Generative AI for the company?





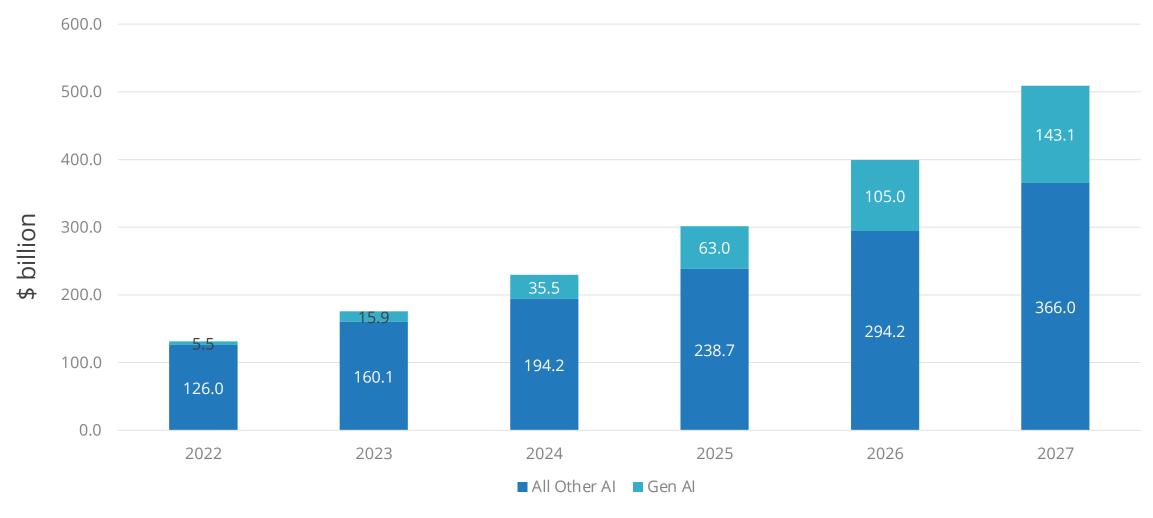
The C-Suite in India is cautiously optimistic, it appears..

For which of the following Generative Al-related business benefits and business risks has the C-Suite most sought information or advice from IT leadership?



- Accruing efficiency & productivity gains are top benefits sought by C-suite in India.
- Managing employees and customers is an area of concern for the C-suite in adopting GenAl

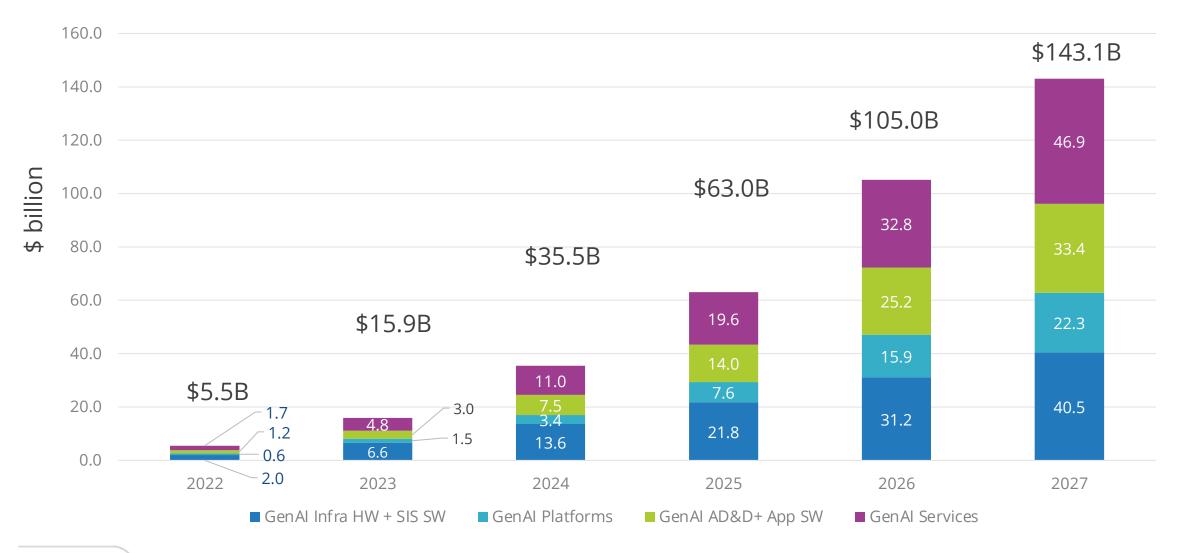
We expect a quantum jump in Worldwide Gen AI investments



IDC forecasts that the Worldwide GenAI market spend is poised to reach \$15.9 Bn by the end of 2023, and will grow with 73.3% CAGR from 2023 to 2027.



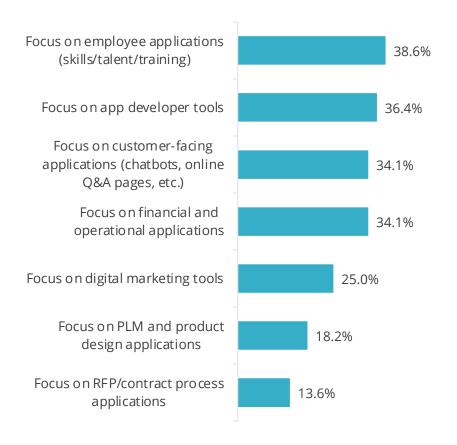
GenAl Core IT Spend by Major Elements - Worldwide





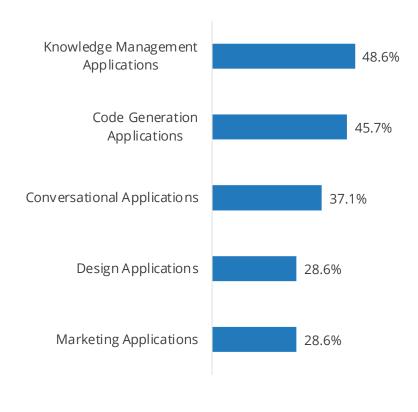
So where will all this spend happen in India?

What are the top 2 areas of focus for your C-Suite when it comes to integrating Generative AI into existing applications or business processes?



What Generative AI use cases do you anticipate having the most promise for your organization?

Generative AI Use Cases





To live up to its potential, 2 key concern areas need to be addressed

Q. What factors are significantly limiting the evaluation and testing of GenAl in your organization?

Excessive infrastructure costs associated with model training or running Gen Al enhanced application...

Concern that Gen AI use will expose us to brand and regulatory risks

Budgetary constraints are keeping the efforts siloed, LOB-focused, or overly narrow

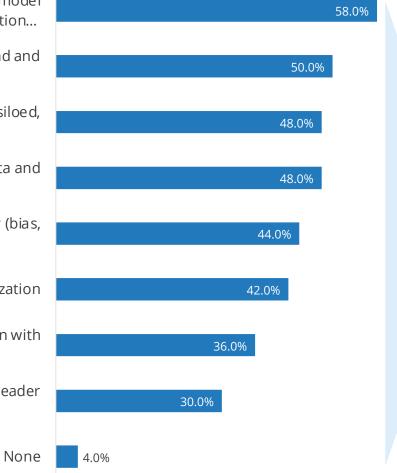
Concern that Gen Al jeopardizes our control of data and intellectual property assets

Concerns about accuracy or potential toxicity (bias, hallucinations in the outputs)

Lack of Gen AI skills or expertise within the organization

Lack of clear use cases or initial offerings that align with our business needs

Lack of C-Suite or Line of Business (LoB) leader commitment



- For Gen AI to materialize, it is important that existing concerns and risks are addressed effectively via internal policies and external regulations.
- There is a broad concern around the interplay between the high infrastructure costs and budgetary constraints while managing risk and compliance.



The ROI question

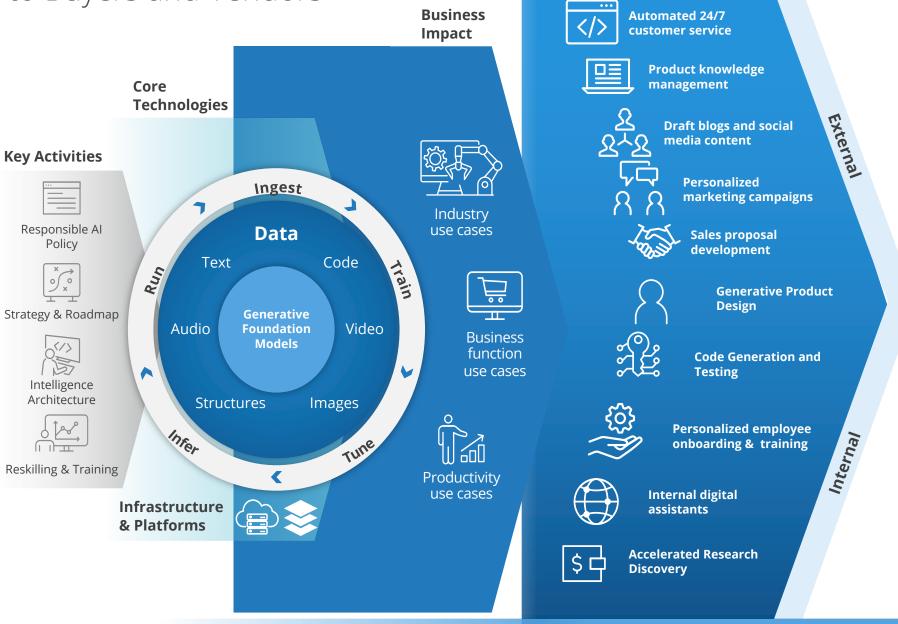
Use cases are being ironed out; Legal/regulatory risks need to be addressed

Ways to drive ROI

Leverage GenAI strengths for maximum ROI for high and immediate cost and time savings

Intangible benefits: Brand reinforcement, Morale, Customer satisfaction & Experience and Quality

Gen Al: Advice to Buyers and Vendors





Sample Use cases

Gen Al: Advice to Buyers

Assess your foundational GenAl readiness

 Establish a responsible Al policy, Al strategy and roadmap, an intelligence architecture, and workforce upskilling.

Partnerships with GenAl vendors

 Leverage their expertise and tools to deliver on proof-ofconcept (POC) initiatives to evolve the underlying capabilities required.

Build for the future

 Evaluate capabilities across layers of the technology stack: Infrastructure and compute, data, foundational models, orchestration, and application

Build a Robust Data Value Chain

 Partner with vendors with complimentary strengths/influence across the value chain

Thank you

