

LAUNCH OF GLOBAL TECHNOLOGY & BUSINESS SERVICES COUNCIL

KH	<p>Welcome Ladies and gentlemen and thank you for joining us for this launch event – which we believe to be a very significant announcement and development for the technology and business services industry.</p> <p>My name is Kerry Hallard, and I'm CEO of the GSA, one of the founding members of the initiative we will announce today, representing the United Kingdom.</p> <p>Before we start, full press packs are being sent to you and you will be able to access this recording and all materials including profiles of all associations and all representatives via our website.</p> <p>We will be answering questions at the end of this session, so please do post any you have in the chat box of this webinar.</p> <p>Today we are officially announcing the launch of the Global Technology & Business Services Council (GT&BSC) - an alliance of 12 international associations representing technology and business services industries across Bulgaria, Egypt, India, Latin America, Malaysia, Poland, Russia, South Africa, Sri Lanka, United Kingdom, United States and Ukraine, directly representing the interests of more than 10,000 organizations and an industry employing more than 10 million professionals.</p> <p>All the associations and their representatives here today are incredibly proud of how well our industry responded to the challenges presented by COVID-19. Partnerships and individuals around the world worked tirelessly to ensure key services were delivered in really adverse conditions, remodelling and reinventing business processes literally overnight.</p> <p>It is this Council's belief that the global technology and business services industry has been critical to getting many companies through COVID-19 to date and will be essential to drive the global economy out of this inevitable downturn. This is a global industry and therefore we need to collaborate globally. That is the intent of this Council.</p> <p>Today we are going to talk you through 3 key areas:</p> <ol style="list-style-type: none">1 how well the industry responded to COVID -192 the importance and role of the industry in helping companies and Governments through their restart strategies3 the rationale for, aims and objectives of this Council <p>I would now like to hand over to Michel Janssen, Chief Research Officer at Everest Group, IAOP's Research Partner, to give an analyst's view on the industry's response.</p>
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<p>MJ</p>	<p>We are all painfully aware that the COVID-19 pandemic has created business disruptions and affected thousands of companies and millions of employees globally. Yet the global technology and business services industry has demonstrated remarkable agility, commitment and resilience in responding to the crisis.</p> <p>Over time, our data clearly indicate shifting concerns that both enterprises and the service provider community have experienced. In the early days, it was about process resilience and the initial technical challenges of Work From Home. As time has marched on, this has shifted to support both short-term cost savings and addressing longer-term structural challenges that will have a lasting impact on our industry. This is especially true in Work From Home -- as it applies to both insourcing and outsourcing situations. It has become evident that this is NOT a trend but rather a future reality - which requires enterprises to quickly recalibrate both operating models and management policies.</p> <p>This organization's ability to monitor and articulate the needs of its stakeholders will be a huge benefit to the industry going forward. Creating a common platform for those discussions is exactly what is needed today to help piece together facts and content on a global basis.</p> <p>It will be great to hear from different country representatives about their responses.</p> <p>Andy Searle, CEO of BPESA, perhaps you could share the industry response from South Africa's perspective.</p>
<p>AS</p>	<p>Sure, thanks Michel. Good afternoon</p> <p>The South African Government, in support of business, recognized the importance of the sector and immediately granted essential service status to many international and domestic companies enabling them to continue delivering essential services</p> <ul style="list-style-type: none"> - Industry Collaborated extensively to develop workplace health and safety protocols to stop the spread of the virus in the workplace while ensuring the well being of workers as the number one priority - South Africa adapted very quickly to deploy new operating models with between 30% and 100% work from home blend with on premise work - A key focus remained on the continuity of essential service delivery to local and international clients ensuring that they too could cope with the negative impact of COVID 19 - this was well received and recognized internationally - and the country has presented new options to global players to de risk their businesses in these times of uncertainty and disruption <p>The situation in Sri Lanka was similar so I'd like to hand over to Channa Manoharan, Chairman, SLASSCOM, Sri Lanka</p>

CM

Sri Lanka (SLASSCOM) - Sustaining the industry and preparing for the upturn

We see the business impact of Covid-19 to be temporary and are optimistic of a rebound by the turn of 2021 with demand coming from increase in digitalisation across governments, businesses, and individuals. Our industry shifted into WFH gear almost immediately when lockdown came into effect and continued to deliver to our global customers.

We communicated this positive outlook through “Drifting the curve” messaging which is an analogy of a racer car driver accelerating when approaching a bend in order to build momentum when coming out of it unlike a normal driver who tends to slow down.

Towards this we focussed on few initiatives to help sustain the industry during the lockdown period and prepare it for the upturn.

- we worked with the government to expedite the financial relief measures such as loan moratorium and additional working capital loan
- facilitated the issue of curfew passes to access offices for staff who handle critical operations
- created an industry bench to share excess supply and match with short term demands from others

Talent and employment

Unemployment is one of the key concerns across all industries and countries. Our industry retained all of its employees. moreover investing into upskilling and reskilling the talent base. We also launched the SLASSCOM AIESEC LEAD (Learn, Engage, Activate, Deliver) program this month for students graduating during this period and are likely to not find immediate employment. The program is conducted in partnership with universities to engage the students who are already in their online platforms to deliver this program.

Now let's jump to the other side of the world and get a view from the Central and Eastern European Region, Wojtek Poplawski, ABSL Vice President Business Intelligence and Thought Leadership from ABSL, could you expand?

WP	<p>Covid–19 strike for CEE region was as unexpected as it was for the whole world. The quick and positive response to the crisis was possible due to the high level of BCP procedures tested and ready to use long before the pandemic. Work from home was introduced and in less than 5 days over 90% of the business was transferred to this mode. In “Work From Home” we see many positive aspects. Very high, if not even higher, level of work efficiency is one of them. But we also analyze challenges such as decline in employee engagement and lack of sense of community, which were very important for our talented staff. It may impact efficiency in a longer term. These aspects will have to be further analyzed</p> <p>We also understand that companies consider rebalancing their global services footprint and more services will be moved nearshore.</p> <p>Proximity, technological expertise and infrastructure present in CEE was recognised during the pandemic. These aspects will help us build even stronger business services sector, resilient and capable of dealing with future shocks.</p> <p>And finally we have a view from India, Shivendra Singh, Vice President, Global Trade Development, NASSCOM, I'd like to pass to you</p>
SS	<p>Realising the importance of the technology industry, many Governments across the world quickly classified tech services as “Essential services”, to enable the industry to work amidst unusual circumstances for example letting a select percentage of the workforce come to office premises during the lockdown to manage processes that could not be attended to from home.</p> <p>For the rest of the workforce, the industry across the world very quickly transitioned to WFH. To give you an example Indian IT industry shifted almost 90-95% of its 4.36 million technology workforce to WFH. This meant, to ensure least disruption the industry had to create a dashboards for real-time tracking of IT and customer operations, employee productivity, deliveries, and keeping clients updated. By doing this the industry ensured Business continuity for client, while at the same time taking care of its’ most asset “The Highly skilled Talented Workforce”</p> <p>As detailed here. It is clear that the technology and business services sector was integral to supporting businesses across the world as they addressed the challenges of adapting to changes caused by COVID-19, demonstrating remarkable agility, commitment and resilience in responding to the crisis; ensuring business continuity for global clients and prioritizing safety of all employees. The sector was central to the rapid deployment of work from home models and digital transformations, providing critical support and “essential services” to various sectors including governments through highly skilled professionals around the world.</p> <p>This is all referenced in the Council’s report being published today entitled: “A unified global response for the technology and business services industry”. This is in your press packs.</p> <p>Over to Ilia Krustev, Chairman of the Managing Board, AIBEST, Bulgaria</p>

IK	<p>Good Afternoon.</p> <p>So, we responded incredibly well throughout this pandemic, now let's look to the future of the industry and its role in companies and organisations' restart strategies</p> <p>As a Council we have set the following Industry Positioning statement:</p> <p>The global technology and business services industry delivers strategic value through a global eco-system comprised of over 10 million highly skilled and talented workers around the world, operating flexibly, transparently and collaboratively and utilising best practices to deliver thought leadership, technology-led transformation and continuous business improvement. It is recognised as a significant positive contributor to the global economy, and will be a major contributor to re-energizing many economies worldwide.</p> <p>Shivendra, would you like to expand?</p>
SS	<p>Sure, thanks.</p> <p>The pandemic has hijacked our usual ways of functioning, entailed business disruptions and affected millions like never before. There is no doubt that there will be significant and long term shifts in the way we did business, in the way we related to each other, in the way we educated our children as so on. Our era will witness a dramatic restructuring as we seek the "next normal." The one thing that is common in keeping multiple industries afloat during these trying times and enabling them to transform into digital businesses is "TECHNOLOGY". Even before COVID struck, technology was already permeating into different layers of businesses. With the pandemic the speed and the depth of technology adoption is only going to accelerate, not only in India but around the world.</p> <p>Now, who are these people who are driving this, supporting key IT infrastructure, managing data and global processes for critical sectors such as healthcare, government, banking, supply chains, telecom, come up with innovative data driven analytics, products and solutions that help in better decision making. These are HIGHLY SKILLED TECHNOLOGY WORKERS providing absolutely critical "Essential Services". They are leveraging technology as backbone, bring in IT capabilities and keep the societies connected, enable provision of social services, governments across the world to respond to situations like COVID-19, and to meet customer service requirements even in lockdown. Every nation needs access to these technology workers.</p> <p>I'd at this point like to handover to Constantine Vasuk, Executive Director, ITUKRAINE</p>

CV	<p>Technology, collaboration and access to a global talent pool will be key to driving business and Governments out of the inevitable downturn.</p> <p>Companies have already started up-skilling, re-skilling and investing in building the capabilities for the future to ride the new wave of disruption.</p> <p>Our data and surveys predict that the pandemic will accelerate the pace of digital transformation and adoption of emerging technologies like Cloud, AI, AR/VR, Cyber security, Business automation, Virtualization etc will witness a sharp rise.</p> <p>Sharing best practices, thought leadership and collaborating on new operating models on a global stage will accelerate the speed and the depth of the recovery around the world.</p> <p>The on-going development of a global talent pool to fill the needs of companies facing a new normal will be a critical strategy for stability and growth over the next several years.</p> <p>Andy Searle, would you agree?</p>
AS	<p>Sure. The industry is delivering strategic value through operating flexibly, transparently and collaboratively to best practice whilst delivering technology-led transformation and continuous business improvement through a blended global and partnering eco-system and is recognised as a significant and positive contributor to the global economy.</p> <p>We do this through, among others:</p> <ul style="list-style-type: none"> • access to a global talent pool to build more flexible workforces • providing “technology-led business service delivery”. Big data, RPA, AI, Blockchain, CX, digital engagement, 5G, cloud and Cyber-security are amongst the many strategic drivers companies need to deploy • identifying process and workflow improvements and processes to automate • applying criticality analysis and Lean Six Sigma, zero waste and Kanban type techniques to become far more lean and agile • balancing global footprints, blending global and local • offering a blended sourcing eco-system with a portfolio of partners (including shared service centres) to drive transformation and innovations • devising new contracting and shared services models that focus on value creation (rather than just cost reduction) • a partnering approach with shared risk and reward working to mutually aligned objectives to ensure win:win • a commitment to working to best practice and ensuring our partners/SSCs do too <p>This global industry is absolutely essential to Governments and organisations’ business strategies, which is why we have set up this global Council.</p> <p>I’d like to invite Debi Hamil, CEO of IAOP in the US, to explain more.</p>

DH	<p>Thanks Andy. The pandemic has highlighted the connectedness and interdependence of regions across the globe. Now is not the time for short-termism or protectionism.</p> <p>It is the Council's firm belief that technology, collaboration and access to a global talent pool will be key to driving business and Governments out of the inevitable downturn. Sharing best practices, thought leadership and collaborating on new operating models on a global stage will accelerate recovery around the world. We are delighted that our entire industry is collaborating in this global way for the first time and believe this will provide significant value to global governments, our members, their customers and their employees around the world”</p> <p>Wotjek, would you like to add something here?</p>
WP	<p>The GT&BSC provides a new platform that enables leading Industry Bodies to: collaboratively and responsibly shape the future of the sector globally; to share thought leadership; to bring influence to bear on the direction of the sector and its reputation in the eyes and minds of the buyers; to develop, share and implement best practices for business as usual and for crises such as Covid 19; to ensure that the sector contributes positively to the growth of the global economy and that it does so with strong and positive social impact on the more marginalized communities of society</p> <p>The Council is a clear demonstration of the collaboration of potential competitors</p> <p>All Member Associations are the leaders in their region, representing the interests of their members which span the sourcing eco-system of:</p> <ul style="list-style-type: none"> - large MNCs, - Indigenous tech companies, - SMEs and Start-ups cutting across traditional IT services, - BPMs (Business process management), - CX services, - Engineering and R&D services, - Global Capability centres, - Software product companies and tech start-ups including those working in deep tech area leveraging technologies like AI, IOT, AR/VR etc. <p>Hala El Gohary, CEO, ITIDA, Egypt – perhaps you could explain a bit more about the role of the Council and Egypt's involvement</p>

HEG	<p>Sure. Good afternoon everyone. The work of the associations vary, but collectively the role and objectives of the Council include:</p> <ul style="list-style-type: none"> • Promote the industry globally, capturing and sharing the value it adds and the innovations it drives • Advance industry growth • Provide a global network to develop and share experiences and best practice around the world, to include new operating models and frameworks • Professionalise the industry, globally, and attract the best talent to work in it including cross border movement of highly skilled workforce • Work collaboratively on global research programmes and thought leadership to drive change • Represent the interests of the sector to stakeholders including Governments, the media and analysts • Promote the importance of impact sourcing and drive fairness throughout the global industry <p>Commencing today, the Global Technology and Business Services Council will launch a program of work, with immediate next steps including:</p> <ol style="list-style-type: none"> 1. To conduct a global body of research to better understand the industry's global state and prepare a report showing directions of further development 2. To initiate discussions with all potential stakeholders including buyers, providers, governments and analysts to create a voice and point of view that drives change in an era of digital disruption and how we could work together in partnership to create a win-win scenario 3. To continuously publish examples of technological acceleration enabling even stronger resilience to crisis situations and economic recovery 4. To strongly promote the sector, its role in the global economy and the future opportunities it represents <p>I am sure you would like to hear from some members as to why they have joined this Council.</p> <p>Ilia, please explain why AIBEST has joined forces</p>
IK	<p>With the C-19 situation technology and sourcing industry has proven to be the most sustainable part of the global economy. We believe that with this new global formation representing over 10mln people we will have a stronger common voice when it comes to working with governments towards the need of regulations in support of the business and our employees. The vitality and speed of development of the industry and our flexibility gives us the confidence to work together with the governments, the responsible institutions and experts in developing actionable measures, including technological ones, in benefit of the digitalization and the agility of the global economy.</p> <p>Let's now hear from Justin Antony, Executive Director for OM in Malaysia</p>

JA	<p>It is definitely a good initiative in the formation of GT&BSC. The coming together of the various Non- Government Organisations economies is timely especially during this time of the global pandemic. This council will strengthen our efforts as a global response team to address the rising issues faced by the GBS industry especially in addressing the</p> <ol style="list-style-type: none"> 1. Talent Gap and development 2. Establishment of policies and best practices both globally and locally to the respective Governments. 3. Cross border collaborations and partnerships 4. Essential services and digitalisation of the industry <p>We will also hear from Javier Peña Capobianco, Secretary General, ALES, for Latin America</p>
JPC	<p>The main objective of ALES is to promote Latin America and the Caribbean as a global services hub. Therefore, ALES activities are developed to promote a better positioning of the region at the international services market.</p> <p>In recent years, Latin America and the Caribbean has become one of the emerging market regions of global services. In addition, a number of leading multinational companies have set up captive centers in several countries.</p> <p>The region has competitive advantages, including: skilled human resources, competitive labor costs, modern infrastructure, specialization in certain sectors, time zone similar to United States and close to Europe, as well as cultural affinities with the main services importers. Moreover, the diversity that characterizes Latin America contributes to the complementarity of talents, laws and languages.</p> <p>As a result, we believe that Latin-American countries could have the opportunity to play an important role in this sector, and for that to take part in this global initiative is a great step in this direction.</p> <p>And I'd like to hand back again to Debi in the US</p>
DH	<p>IAOP is an independent, member driven organization bringing together a global community working across all industries and all functions, on a level playing field to foster collaboration and relationships. And that is why we are thrilled to be part of this unprecedented event – the establishment of a coalition of like-minded organizations globally, to further the technology and business services industry in a time of challenge and adversity. We come together, not as competing groups, but as colleagues with a shared mission to work together to promote the agility and importance of this industry, to showcase best practices, the amazing talent of individuals working in these fields now, and the critical need to develop and skill our youth to fill new roles. This will help drive our economies and prepare us for the recovery. And we can do all of this while doing what is right for our own membership, our own economies and for society – home and around the world. We can all do well by doing good.</p> <p>And with that I'd like to pass back to Kerry to close</p>

KH

Thanks Debi.

So over the last 20 minutes or so we have covered...

- how well the industry responded to COVID -19 and there's a report supporting that
- the importance and role of the industry in helping companies and Governments through their restart strategies
- and the rationale for, aims and objectives of this Council

...from 11 of the Founding members here.

Our 12th Founding member is the Astra association that represents Russia.

It is with great sadness that we pay tribute to Sergei Makedonski, President of Astra in Russia, who we lost suddenly a few weeks ago. He was a very engaged member of this Council – as well as a great friend to many of us - and his devout dedication to this industry will never be forgotten. Astra has stressed their ongoing commitment to this Council and desire to make that a lasting legacy to Sergei,

but currently they are in the throes of selecting their new President.

We hope to intro him / her soon.

I will shortly open the floor for questions but before I do so, I would like to reconfirm what you will see next from the Council

Just as the crisis has been global, recovery efforts must be as well.

In a GSA survey we saw trust increase between both providers and buyers, creating a more agile, value-rich and cost-effective way of working for businesses the length and breadth of the globe. We will continue to see a new version of outsourcing, which is not of the 'your mess for less', characteristic but transparent, value output-based services highly enabled by automation and cloud, which will not only minimise the risks and exposure to such unprecedented disruption as caused by COVID19 but also significantly boost process efficiency, support innovation and overall business performance.

All of our members, which are comprised of both enterprise buyers and service providers, as well as advisers and SMEs, buy and deliver technology and business services around the world, so having a Council which helps them understand the nuances of the different regions and which has been forged to promote and share the same best practices globally will be hugely beneficial, and, is of utmost importance right now.

Now is not the time for short termism or protectionism.

Sure the economy will be challenging. We cannot predict the next 6 or 24 months, however all businesses are searching for potential answers, new ways of working, best practice and ideas from across the globe. This Council has a pivotal and central role in helping our members and the industry globally with this.

4 things you can expect from the GT&BSC are.....

A truly global view of the world through the largest global body of research ever undertaken, which will inform analysts, advisers and all our membership bases

A global stage for influencing anything from perception, opinion and even legislation

Stats not yet announced:

The industry has also come forward in multiple ways to provide immediate relief:

- distribution of relief material,
- donation to national relief funds,
- donations of spare servers, p
- providing **global educational resources for teachers, students and parents** (1.37 billion children risk having their education interrupted) **for free,**
- **acquiring personal protective equipment (PPE) and medical equipment for medical staff,**
- **donating office equipment**

Shift to WFH in a very short period of time:

- Serbia reported 60% shift to WFH,
- Croatia 69%,
- North Macedonia 80%,
- Bulgaria close to 90%
- Egypt about 85% in the first two weeks of lockdown.
- Poland close to 90% workforce shifted to WFH within the first week
- Indian IT industry shifted almost 90-95% of its 4.36 million technology workforce to WFH
- 87% of the industry in Sri Lanka had minimum impact, and majority of employees were able to WFH
- South Africa - productivity levels remained at least the same as on-premises and in some cases were even better.

Other examples of resilience:

- Poland - 58% of companies continue to make progress on their growth strategies and recruitments plans
- Czech Republic 97% of companies are still hiring
- South East Europe - 81 % of companies noted productivity to be even higher than before lock down
- Malaysia - 70% of employers are of the opinion that employees are more efficient and productive while working from home
- **converting office facilities into hospitals**