Research brief - **Capgemini Research Institute 2025**

Harnessing the value of AI

Unlocking scalable advantage

Capgemini RESEARCH INSTITUTE

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Who should read this report and why?

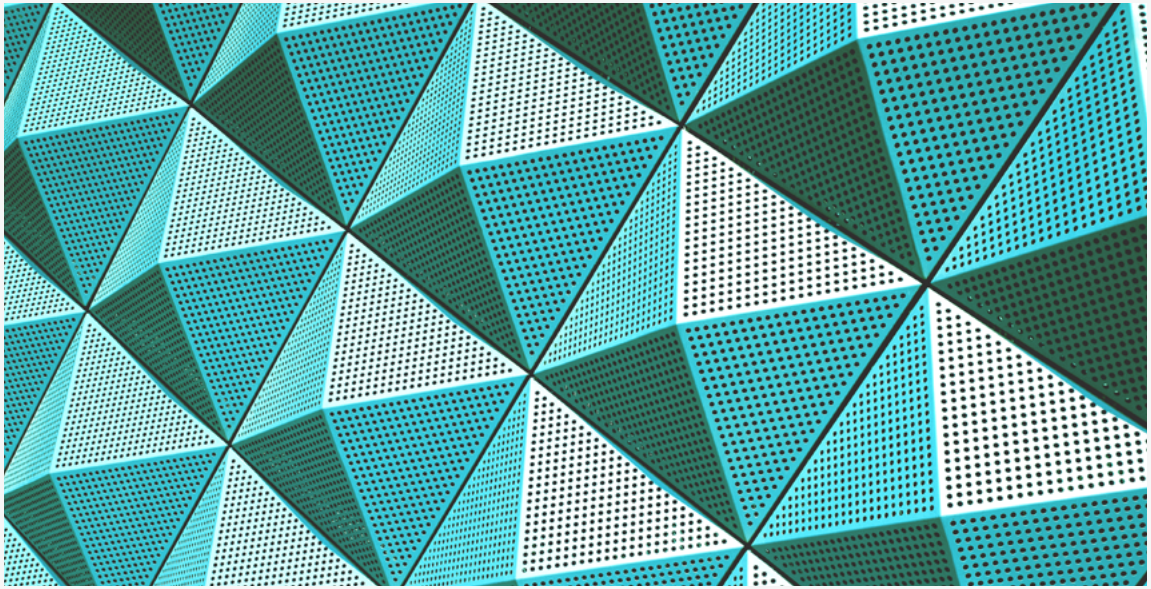
This report offers critical insights for business and technology leaders into the transformative potential of traditional AI, generative AI (Gen AI), and Agentic AI. This applies to large organizations across sectors and industries including automotive, consumer products, retail, financial services, telecom, energy and utilities, aerospace and defense, high-tech, industrial manufacturing, pharma and healthcare, and the public sector/government. It is the third installment in our annual research series and identifies shifts in adoption and investment levels, emerging use cases, as well as return-on-investment (ROI) trends. It also explores the implications of AI adoption for the workforce, governance best practices, and scaling strategies.

Business leaders across functions including corporate strategy, finance and risk, human resources, marketing and sales, IT, sustainability, innovation/R&D, product design/development, sourcing, manufacturing/operations, and supply chain will find the report useful. It draws on the comprehensive analysis of the findings from a survey of 1,100 leaders (director level and above) at organizations with annual revenue above $1 billion across 15 countries: Australia, Brazil, Canada, France, Germany, India, Italy, Japan, the Netherlands, Norway, Singapore, Spain, Sweden, the UK, and the US. If you are looking to move beyond experimentation to scaled, ethical, and high return on investment (ROI) AI deployment – this report is for you.

02 Executive summary

AI is in transition. The technology is moving from isolated pilots to sweeping, mainstream adoption at an unprecedented pace. Organizations are unlocking remarkable benefits, from accelerated innovation to transformative productivity gains. But this breakneck expansion also brings challenges such as cost containment, workforce adaptation, and governance complexities, with a growing emphasis on ethical, sustainable, trustworthy, and sovereign AI.

This report encompasses the integration of technologies, including traditional AI, generative AI (Gen AI), and Agentic AI. Additionally, it analyzes the implications for talent management and governance and suggests strategies to facilitate the responsible and sustainable scaling of Gen AI and AI agents.

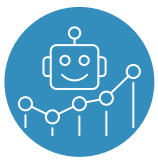


Gen AI adoption is now mainstream

Gen AI adoption has surged from 6% in 2023 to 30% in 2025 - **a fivefold increase in two years, with** 93% of organizations across sectors now exploring, piloting, or partially/fully enabling Gen AI capabilities. In telecom, for example, partially or fully scaled implementation increased to 49% in 2025, more than doubling from 2024. Customer operations, marketing, risk management, and IT remain the leading functions in Gen AI implementation. Gen AI adopters are also benefiting significantly, with around 80% expressing satisfaction with their Gen AI outcomes.

Investments in Gen AI are accelerating

Nine in ten (88%) organizations are reporting **an average 9% increase** in Gen AI investments over the past 12 months. Most (61%) executives expect this trend to continue over the next year. However, cost concerns, including 'bill shocks,' remain prevalent. Organizations are also increasingly turning to the cost-effectiveness of small language models (SLMs).



The rise of AI agents

Already, **14% of organizations have implemented AI agents at partial (12%) or full scale (2%)**, and nearly one-quarter (23%) have launched pilots. Most (85%) executives are optimistic about AI agents progressing to handle one or more business processes in their functions over the next 3-5 years. Of the organizations already scaling AI agents, nearly 45% are piloting or scaling multi-agent systems, underlining the pace of adoption. Almost four in ten organizations today are optimistic that AI agents will evolve into self-learning entities that require minimal human supervision in the next 3-5 years.

A new collaborative human-AI model

AI is evolving **from a tool into a team member**. Our research highlights that nearly 6 in 10 organizations are looking at AI as either an augmenting/autonomous team member or a supervisor for other AI, with a view to implementation in the next 12 months – up from 44% currently. But organizations are underprepared for such a collaboration. Organizations also expect AI agents to focus on specific tasks, rather than taking over entire roles, with almost 78% likely to use AI agents in this way in the next 3-5 years. Nevertheless, more than 3 in 5 organizations acknowledge that employees are concerned about the impact of AI agents on jobs and careers.

Trust around AI remains an ominous concern

A majority (71%) of organizations state they cannot fully trust autonomous AI agents for enterprise use. Lack of adequate AI governance is a significant factor in this **limited level of trust**. Most organizations still struggle to set adequate guardrails and governance for AI. Only 46% have established governance policies for their AI systems and, among those, 47% report that employees seldom follow these policies. However, we see that organizations are beginning to establish ethical guidelines for the use of AI.

AI's growing environmental footprint

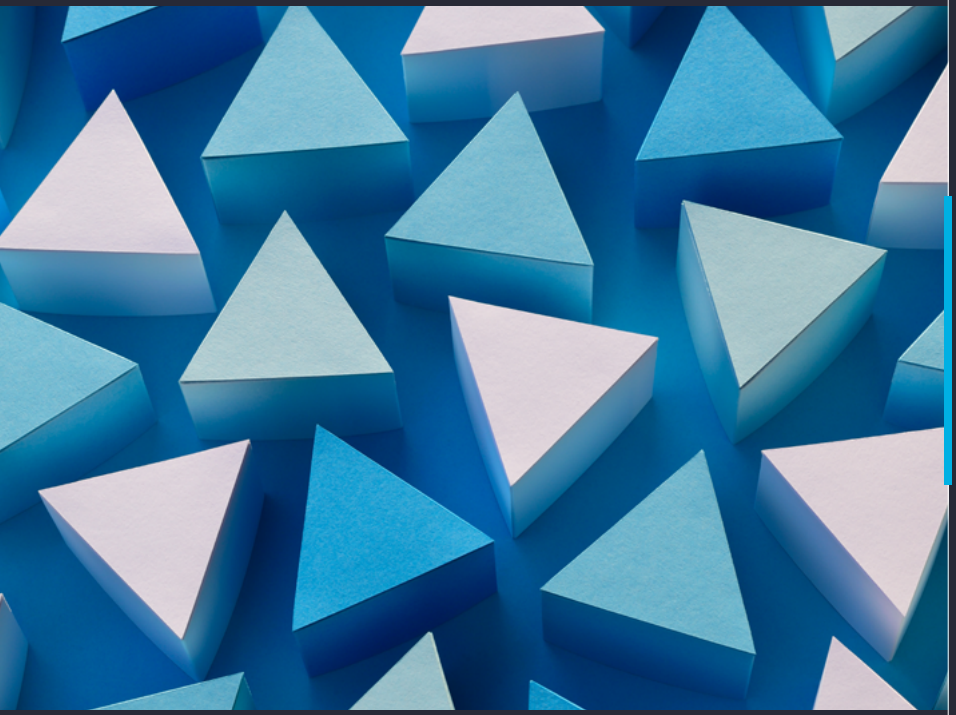
Organizations recognize that **Gen AI has a worryingly large and growing carbon footprint**. But the lack of transparency from hyperscalers and Gen AI model providers around the energy and carbon footprint of foundational models poses a significant challenge to measurement. Currently, only one in five organizations measures its Gen AI environmental footprint. Organizations are beginning to incorporate sustainability measures such as guidelines for responsible use and use of smaller, task-specific Gen AI models.

Generating value with AI:

Architect the right processes, tech, data, and platforms for scalable AI:

- Redesign processes to deploy AI effectively
- Develop a framework to identify the right blend of AI technology for their business and industry needs
- Build robust data and tech ecosystems for scalable and responsible AI
- Embrace 'platformization' for scaling AI

- **Reinforce trust with strong AI governance:**
  - Ensure AI operates within a defined scope of execution and actions remain traceable and explainable to earn trust
  - Establish robust, cross-functional AI governance backed by ethical considerations
  - Set up a strong framework for data governance and management
- **Design interactions between humans and AI to reinforce approaches to workflows, decision-making, and culture:**
  - Rethink workforce planning, roles, and career paths
  - Prioritize skill development and cultural transformation
  - Adapt practices, processes and operating models for human-AI teams
  - Redefine performance measures to gauge hybrid performance



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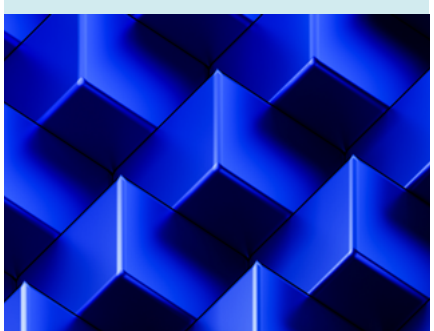
Gen AI goes mainstream

In just 24 months, Gen AI has moved from the fringes to the forefront

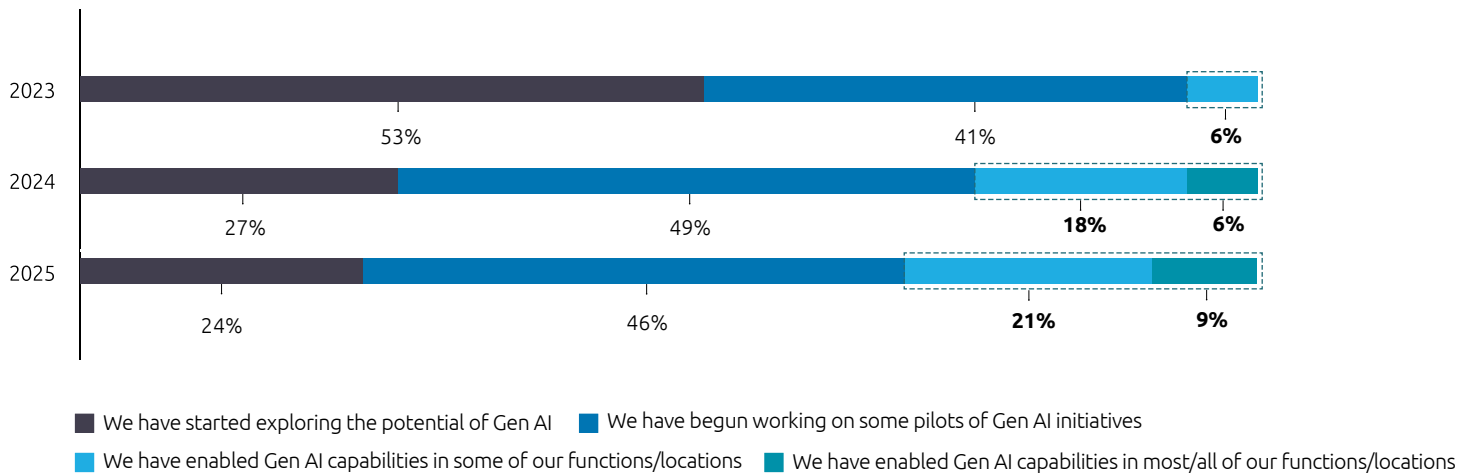
7%

Across our total survey sample of 1,100 organizations, only 7% are yet to begin exploring Gen AI



Of those organizations who have at least begun to explore Gen AI, adoption has soared from 6% in 2023 to 30% in 2025 – a fivefold increase

Percentage of organizations at each stage of Gen AI maturity



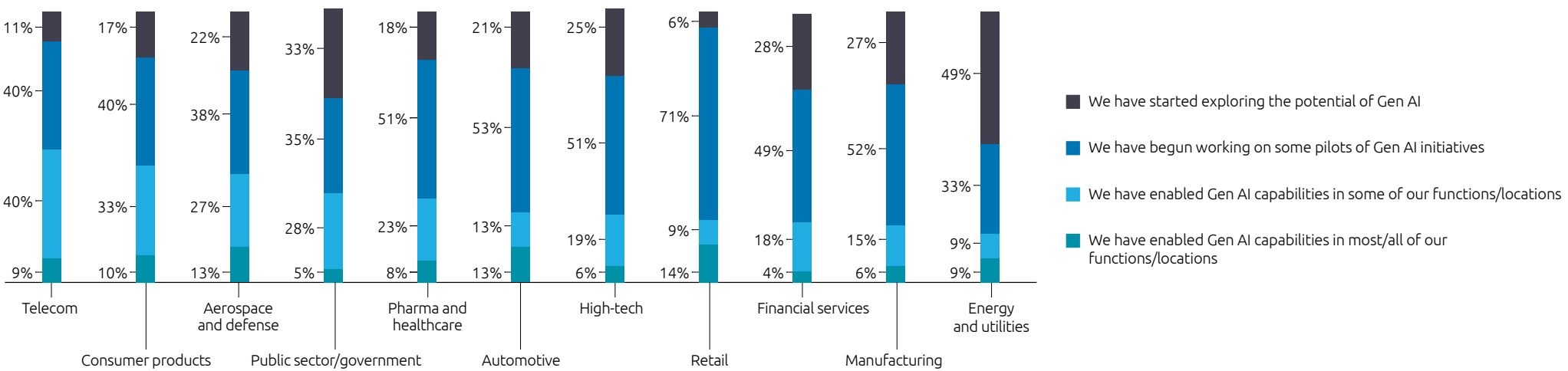
Source: Capgemini Research Institute, Generative AI executive survey, April 2023, N = 800 organizations; Generative AI executive survey, May–June 2024, N = 940 organizations that are at least exploring Gen AI capabilities; Generative AI executive survey, May–June 2025, N = 896 organizations that are at least exploring Gen AI capabilities.

* In the 2024 data points, respondents from India and the public sector/government are excluded as they were not included in the 2023 research.** In the 2025 data points, respondents from India, Brazil, and the public sector/government are excluded as they were not included in the 2023 research.

Adoption soared from 2023 to 2024, now scaling demands perfect alignment across tech, data, and culture.

More than 4 in 10 telecom, consumer products, and aerospace and defense organizations have implemented Gen AI across some or most functions or locations

Percentage of organizations at each stage of Gen AI maturity, by sector, 2025



*High-tech sector includes technology services, semiconductors, hardware, software etc.
Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

Telstra

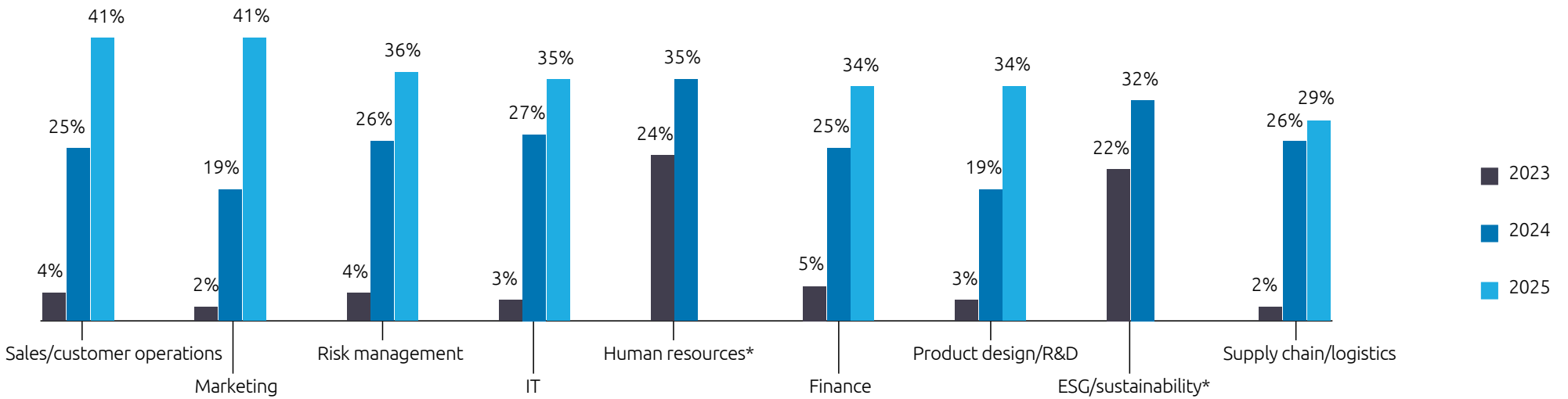
Australian telecom organization Telstra rolled out a Gen AI tool, Ask Telstra, to help its human agents find answers to customer queries and summarize customers' recent histories in seconds. Eight in ten agents said it positively impacted customer interactions and 90% said they were more effective since implementation and encountered 20% less follow-up on calls.[1]

Baskin Robbins

In Korea, Baskin Robbins launched an ice-cream flavor using ingredients recommended by Google's Gemini LLM, which suggested flavors to customers based on their MBTI[2] personality traits.[3]

Customer operations, marketing, risk management, and IT remain the leading functions in Gen AI implementation

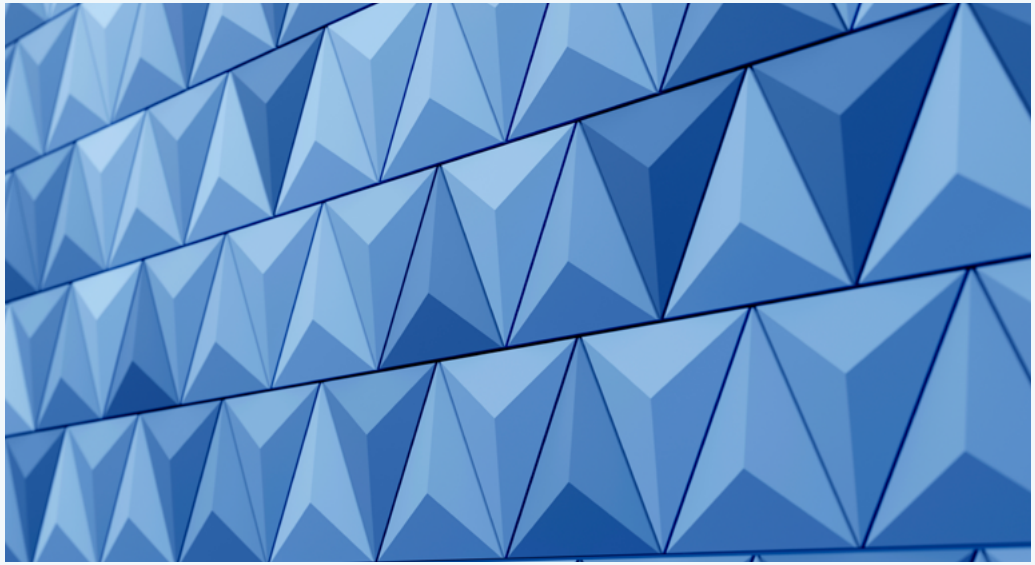
Percentage of organizations implementing Gen AI use cases, by function



Source: Capgemini Research Institute, Generative AI executive survey, April 2023, N = 800 organizations; Generative AI executive survey, May–June 2024, N = 940 organizations that are at least exploring generative AI capabilities; Generative AI executive survey, May–June 2025, N = 896 organizations that are at least exploring Gen AI capabilities, N varies per functional use case.
* ESG/sustainability and human resources were excluded from the 2023 research.
** "Implementation" refers to organizations that have partially scaled the functional use case in question.
*** In the 2024 data points, respondents from India and the public sector/government are excluded as they were not included in the 2023 research.
*** In the 2025 data points, respondents from India, Brazil, and the public sector/government are excluded as they were not included in the 2023 research.

Marketing, sales/customer operations, product design/R&D, and human resources are the functions where organizations have seen the greatest rise in adoption (more than 15pp) in the past 12 months.

60%	Gartner estimates that by 2028, 60% of **B2B sales-related interactions** will be executed through conversational user interfaces via Gen AI sales technologies, up from less than 5% in 2023.[4]
300%	Using Gen AI, **Mastercard** doubled its detection rate of compromised cards, reduced false positives by up to 200%, and increased the speed of identifying merchants at risk by 300%.[5]
55%	By equipping its developers with Gemini's Code Assist, **Wayfair**, a home goods company, saw a 55% reduction in the time it takes developers to set up their development environment (including faster onboarding for coding tasks and less time spent on configuration) and a 48% increase in unit test coverage). Moreover, **60%** of developers reported that they were able to focus on more value adding work.[6]



"We […] believe that generative AI will revolutionize client interactions, bring new efficiencies to advisor practices and, ultimately, help free up time to do what you do best: serve your clients."[7]

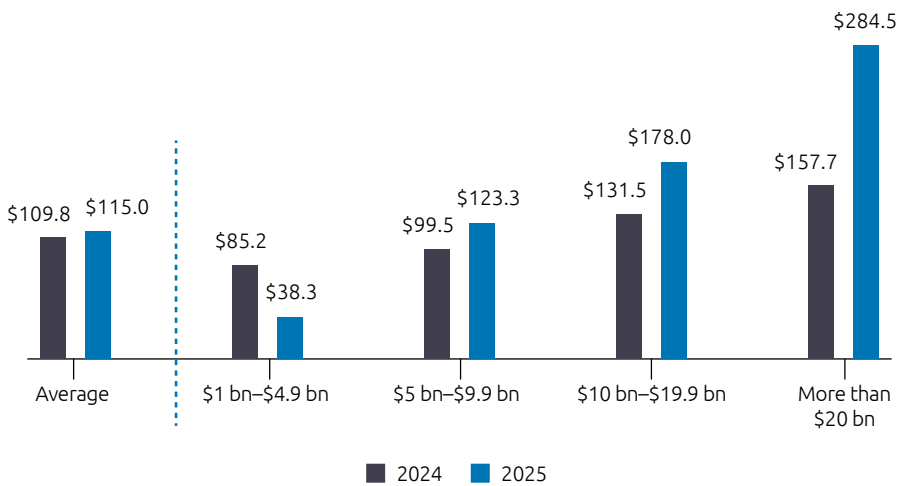
Andy Saperstein

Co-president
Morgan Stanley

Organizations are committed to investing in Gen AI: 88% increased spending by at least 9% in the past 12 months

12%	of organization's IT budget is dedicated to Gen AI
63%	have a dedicated budget for Gen AI
88%	say their investments in Gen AI have increased in the past 12 months (by 9% on average)
61%	say their investments in Gen AI will increase in the next 12 months (by 9% on average)

Average investment dedicated to Gen AI, by annual revenue, in $ million



Source: Capgemini Research Institute, Generative AI executive survey, May–June 2024, N = 981 organizations that are at least exploring Gen AI capabilities, excluding the public sector, Generative AI executive survey, May–June 2025, N = 943 organizations that are at least exploring Gen AI capabilities, excluding the public sector.
* In the 2025 data points, respondents from Brazil are excluded as they were not included in the 2024 research.

Gen AI investments are helping organizations deliver value

63% of organizations say that Gen AI is **helping them deliver value**

66% say they will be at a **significant disadvantage compared with their competitors** if they do not adopt Gen AI

78% say that Gen AI helps them to **differentiate their products and services and strengthen their brand identity**

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

Strategic investment in Gen AI can give organizations a competitive edge but requires a strong vision and responsible implementation.

Most organizations are happy with the outcomes of their Gen AI adoption

79% of organizations are happy with the outcomes of their Gen AI adoption

43% of organizations say outcomes from Gen AI have exceeded expectations

36% say outcomes have met their expectations

Organizations expect to realize a positive ROI from their Gen AI investments in **3.2 years** on average.

21% of organizations are not happy with the outcomes of their Gen AI adoption

Top reasons for dissatisfaction
(Percentage of organizations citing this as a top reason)

56%	48%	44%	42%
Unclear metrics to evaluate Gen AI performance	Lack of deployment methodologies and capabilities	Too many use cases	Lack of data management and governance

*Note: Other factors for dissatisfaction include lack of enterprise data for Gen AI customization, lack of baseline measurements for comparison, inefficient/lack of governance for Gen AI, and lack of an overarching Gen AI strategy
Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

Rampant experimentation is also leading to rising Gen AI costs

57% of organizations agree that high costs associated with licensing and implementation are a significant hindrance to scaling Gen AI

55% of organizations say initial investment costs of Gen AI may outweigh its benefits in the near term

Bill shock comes to the cloud

74%

of organizations agree that Gen AI has led to an unexpected surge in cloud consumption costs.[8]

51%

agree that they have experienced bill shocks owing to costs of Gen AI scaling much faster than anticipated.

- 57% of organizations piloting Gen AI experienced bill shocks, compared with 46% of those scaling it.

30%

A recent report highlighted that enterprise cloud costs rose by 30% on average in the past year

Spending on AI and Gen AI were cited as top drivers of growing cloud spend by half of respondents.[9]

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

The increasing shift from fully pre-trained to reasoning models is adding to computational costs for organizations.

"Effective AI cost management involves strategic investment, understanding pricing models, using cloud auto-scaling, and investing in early PoCs [Proofs of Concept]. More importantly, it requires prioritizing the development of adaptable solutions that can continuously integrate more cost-efficient AI services as technology evolves."

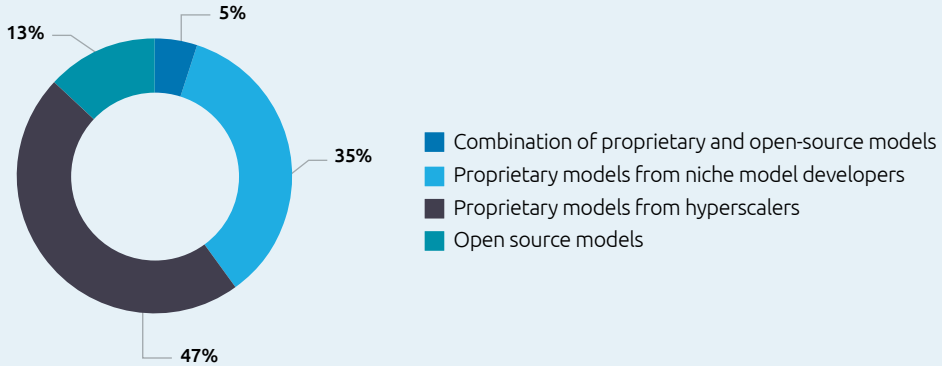
Weiwei Feng

Global Technology Lead, AI and Gen AI
Capgemini

Most organizations prefer proprietary models, yet they are open to exploring open-source models due to cost advantages

Eight in ten (82%) organizations prefer proprietary models for Gen AI implementation

Preferred Gen AI models among executives (%), 2025



Organizations have begun to explore open-source models due to cost and flexibility advantages

are exploring the use of open-source Gen AI models that offer similar/ better performance at a fraction of the cost of mainstream models

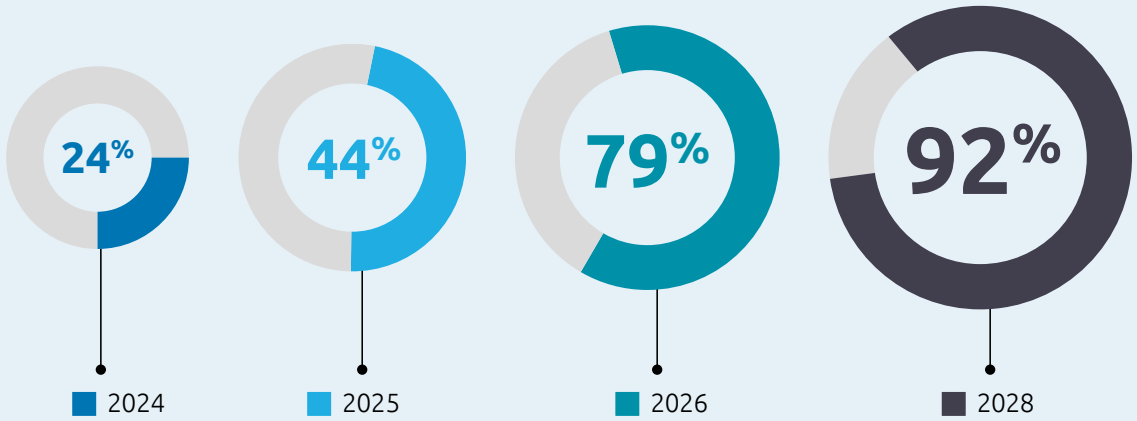
are exploring the use of open-source Gen AI models that offer similar/better performance without any lock-in effect

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 740 organizations that are using pre-trained Gen AI models.

The current usage of open-source models is limited to specific scenarios. These models are primarily chosen for use cases that require minimal operational or capital investment and are often deployed on edge devices.

Ease of development and cost-effectiveness of SLMs are driving adoption

Percentage of organizations using or planning to use SLMs



Source: Capgemini Research Institute, Generative AI executive survey, May–June 2024, N = 1,031 organizations that are at least exploring Gen AI capabilities; Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 982 organizations that are at least exploring Gen AI capabilities.
* In the 2025 data points respondents from Brazil are excluded as they were not included in the 2024 research.

Top reasons for SLM adoption

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

Small is the new big: Increasing adoption of SLMs highlights growing confidence in the technology and a pivot in enterprise AI strategy toward specialized, efficient, and cost-effective solutions tailored to specific business needs.

"Smaller models mean the applications are less costly to run and, more importantly, if you have a model that is 100 times smaller, you can call it 100 times more for the same cost, bringing a little more intelligence to your application with each call. We refer to this as 'compressed knowledge."

Arthur Mensch
CEO and co-founder
Mistral AI

Source: Capgemini Research Institute, Conversations for Tomorrow Edition 9, October 2024.

04

The rise of AI agents

What are AI agents and Agentic AI?

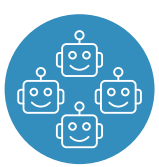
AI agents

are reasoning engines that are connected to the business environment, make decisions autonomously, and act to achieve specific goals with or without human intervention. With the latest advances in reasoning AI models, AI agents can break down tasks, 'reason' through logic pathways to find solutions, test those solutions, and present successful outcomes.

Examples of AI agents include OpenAI's Operator, Devin, Manus, and Google Gemini Agent Mode, Runner H by H Company.

Agentic AI

is a broader term and includes systems, platforms, practices, tools, and technologies that enable agents to function. Agentic systems have been around since before the current AI boom and can be built using both AI and non-AI technologies.



Multi-agent systems

are made up of multiple independent agents with distinct capabilities and roles. These autonomous agents:

- interact with their environment and each other
- can act independently
- coordinate and collaborate seamlessly across various business and IT processes to achieve common goals

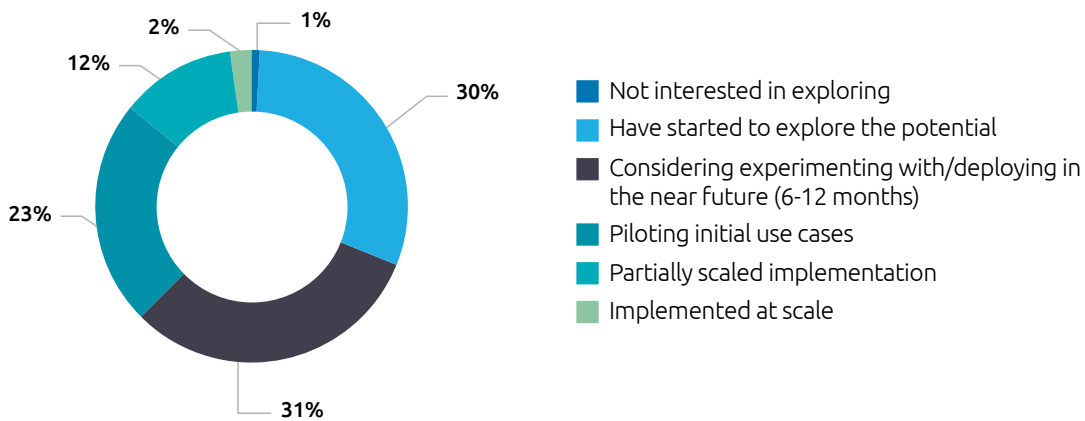
These systems are ideal for complex tasks requiring expertise across various domains.

> ***"In future, AI agents will become the primary way we interact with computers. They will be able to understand our needs and preferences and proactively help us with tasks and decision making."[10]***
>
> **Satya Nadella**
> CEO
> Microsoft

AI agents are beginning to make their presence felt

14% of organizations are already deploying AI agents partially or at scale

Preferred Gen AI models among executives (%), 2025



Source: Capgemini Research Institute, AI agents research, July 2025, N = 1,522 executives.
Note: "Partially scaled implementation" refers to the phase following a successful pilot stage, where several AI agents are available to a select group of users within a specific function, unit, or location. "At scale" refers to the phase following a successful partial scaling, where several AI agents are generally available within a function or where multiple functions have agents that are generally available.

Question asked: Which of the following statement best describes the current state of adoption of AI agents in your organization? Select one. To verify the data, we reconfirmed the adoption of AI agents – we checked that they were referring specifically to AI agents, rather than AI/Gen AI assistants (such as Microsoft Copilot, Google Gemini, Open AI's ChatGPT, Le Chat by Mistral AI etc.). Please refer to the appendix of the report for an explanation of the distinction between AI agents and AI/Gen AI assistants.

62%

of organizations **prefer to partner with solution providers**, such as Salesforce, SAP, and ServiceNow, and system integrators to implement or tailor AI agents that are already available as part of those product suites.[11]

only 33%

of organizations **prefer to develop proprietary AI agents entirely in-house.**[12]

AI agents in action

Transforming customer service

Crédit Agricole Polska partnered with Deviniti to enhance customer service efficiency by deploying an AI agent. The agent performed smart classification, emotional tone detection, automated responses, and workflow automation. As a result, the bank achieved a 50% reduction in document-processing time; saved over 750 hours per month; improved customer satisfaction and team morale; and accelerated the resolution of complex cases.[13]

Improving software development

US retailer **Walmart** added AI agents to its developer toolkit. One of the agents is specifically designed to identify accessibility gaps in code. ***"Going back and retrofitting code that already exists and sifting through and identifying those gaps is a laborious and error-prone activity, so what better use case than that for an agent?"*** asks Sravana Karnati, EVP of Global Technology Platforms at Walmart.[14]

Preventing fraud

Online payments company, **PayPal**, has deployed AI agents to detect and prevent fraud in real time. These intelligent agents analyze transaction patterns, flag suspicious activity before processing, and learn continuously from new data. This results in a 30% drop in fraud and enhanced customer trust. [15]

Streamlining operations

YUM Brands, The parent company of Taco Bell and operator of 60,000 restaurants worldwide, has introduced an AI-powered restaurant manager that can track crew attendance and plan shift patterns, as well as suggest adjusted opening hours to align with market conditions, and even attend the drive-through window.[16]

Optimizing logistics

UPS A global logistics leader, uses an AI agent called ORION to help plan delivery routes in real time. It has reduced the distance traveled by UPS delivery trucks by 100 million miles annually – translating into $300 million in annual savings.[17]

Accelerating R&D

Healthcare giant **Johnson & Johnson** is harnessing AI agents in drug discovery to optimize chemical synthesis and solvent switching. The agents analyze complex variables such as temperature and reaction timing to execute critical steps with precision.[18]

"The economic potential of AI agents is significant, but unlocking it requires adoption driven by clear purpose, not hype. Effective deployment necessitates a comprehensive transformation across processes, people, and technology."

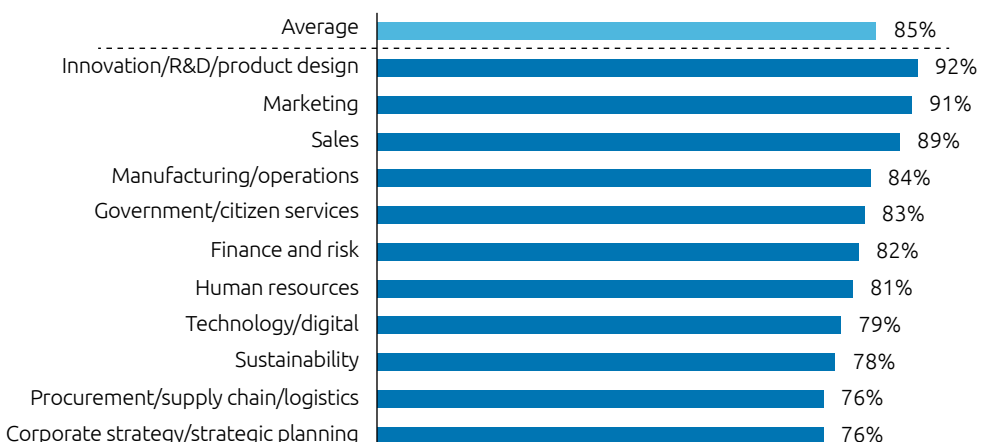
Franck Greverie

Chief Technology and Portfolio Officer,
Head of Global Business Lines,
Capgemini

Most business functions are likely to have AI agents handling at least one business process

9 in 10 executives from product design/R&D, marketing, and sales are optimistic about AI agents handling one or more business processes in their functions in the next 3-5 years

Percentage of organizations who agree with the statement: "In the next 3-5 years, AI agents will collaborate to handle one or more complete business processes in my business function"



Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

53%

believe that AI agents will have advanced reasoning and problem-solving abilities in the next 3-5 years

58%

believe that Agentic AI systems will be a paradigm shift for their organization's productivity

"We are beginning to see measurable efficiency gains, with AI agents delivering a 30 percent or more improvement in structured processes. For less standardized processes, however, the impact varies widely, depending on the complexity of the work and how effectively users engage with the technology."

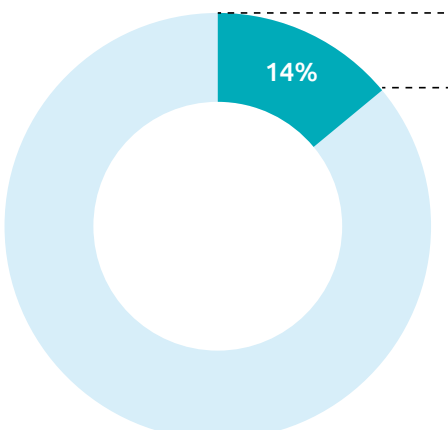
Eric Pace
Head of AI
Cox Communication

Source: Capgemini Research Institute, Rise of Agentic AI, July 2025.

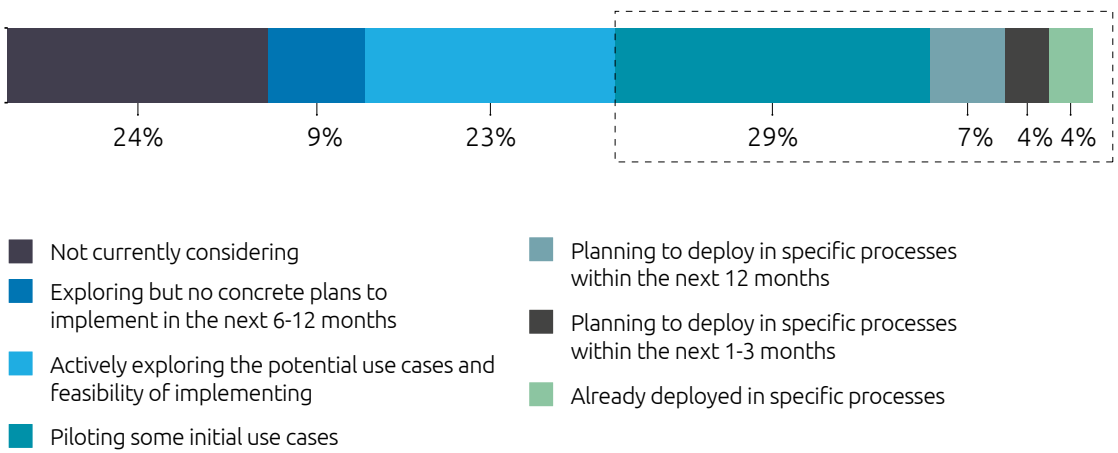
The adoption of multi-agent systems is in its early stages

Of those organizations scaling AI agents nearly 45% are piloting or scaling multi-agent systems

Percentage of organizations partially or completely scaling AI agents



Current status of multi-agent systems use



Source: Capgemini Research Institute, AI agents research, July 2025, N = 950 executives from data/AI and corporate functions.

Source: Capgemini Research Institute, AI agents research, July 2025, N = 114 executives from data/AI and corporate functions who say they are partially/fully scaling AI agents.

In 2023, 6% of organizations scaled Gen AI. By 2025, a similar share is already testing multi-agent systems, highlighting one of the fastest-emerging technology adoption curves in recent times.

Siemens

is deploying AI agents in its industrial automation, marking a major shift from traditional AI assistants to autonomous, orchestrated agents. The organization has developed an orchestrator that acts like a digital craftsman, deploying a toolbox of specialized agents to solve complex tasks across the industrial value chain. These agents can understand user intent, learn continuously, collaborate with other agents (Siemens and third-party) and access external tools autonomously.[19]

43%

believe that AI agents will evolve to orchestrating AI, creating synchronized digital labor in the next 3 5 years

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities

Nearly 4 in 10 organizations are optimistic that AI agents will achieve high autonomy in the near future

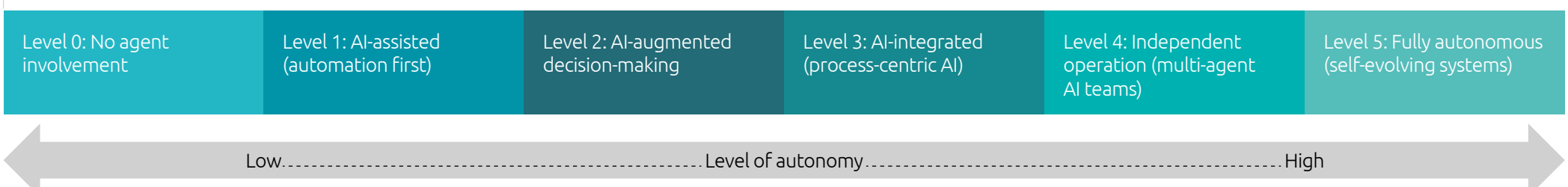
38% of organizations believe AI agents will evolve into **self-learning agents** with minimal human supervision in the next 3-5 years

75% of executives believe that the benefits of adding human oversight to AI agent-driven tasks will outweigh costs[20]

6% of day-to-day decisions within an organization are expected to be made by AI agents in the next 12 months[21]

15% of processes and subprocesses in each business function are expected to be managed by AI agents with Level 3 autonomy or higher in the next 12 months[22]

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities, Capgemini Research Institute, AI agents research, July 2025, N = 1,500 executives.



Without cost discipline, thoughtful design, and ROI-tracking mechanisms, AI agents risk becoming costly experiments, rather than scalable solutions.

"As organizations scale Agentic AI, they need to focus on priorities that deliver meaningful value with non-regrettable risk. This requires a unified enterprise framework that ensures consistent standards for ethics, access, orchestration, and observability. It's this balance between local autonomy and global coherence that will separate experiments from enduring transformation."

Craig Suckling

Chief AI Officer Europe,
Capgemini

Sovereign AI

Sovereign AI refers to AI that is developed, maintained, and controlled within a specific nation's or organization's jurisdiction, ensuring independence from external influences. This is designed to align with local regulations, ethical standards, and strategic priorities, allowing governments and enterprises to maintain autonomy over their AI-driven operations.[23]

European organizations say that data sovereignty is non-negotiable

45%

of European executives say that **sovereignty of AI** is a key factor for them in AI technology purchases.

45%

of Europe-based executives indicate that they would consider non-European solutions, provided they were **hosted on Europe-based servers** and all data is stored within Europe.[24]

Given the backdrop of geopolitical uncertainty, there is an increasingly urgent requirement to secure sovereign AI and governments worldwide are now investing in AI specific to their regions. For instance:

- In June 2025, startup Mistral AI and Nvidia announced a landmark partnership to develop next-generation AI cloud services in France, marking a major step toward European AI sovereignty.[25]
- France's National Strategy for AI, part of the broader France 2030 investment plan, includes more than €109 billion in investments in the country's AI infrastructure projects.[26]
- In June 2025, the UK government pledged a £1 billion investment package intended to scale up the UK's computing power and AI capabilities.[27]

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

How to secure a sovereign play in the age of (Agentic) AI

Build a resilient Inference-as-a-Service infrastructure

Treat data as a strategic asset; invest in data foundations

Secure long-term provision of AI services

Focus on AI-augmented apps as a source of accelrating value

Start building a pool of AI talent for an impactful AI 'playground'

Source: Capgemini Research Institute analysis.

"AI sovereignty goes hand in hand with competitive enhancement. The recent trends leave room to gain competitive advantage at a fast pace, as no country has a moat in AI engineering anymore."

Etienne Grass
Global Chief AI Officer, Capgemini

05

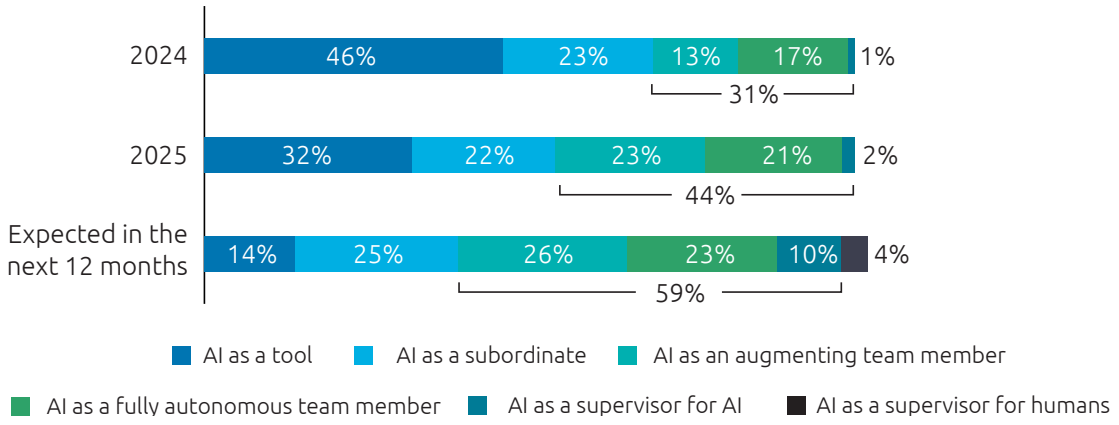
AI x human

The new collaborative model

Teams are evolving into a collaborative fusion of human and AI

AI is evolving from a tool into a team member

Breakdown of human and AI collaboration within teams



Source: Capgemini Research, Gen AI for work survey, July 2024, N=1,500 leaders and managers; Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.
Note: Although 4% expect AI to act as a supervisor for humans (directing/allocating tasks to humans, or prioritizing work for humans) in the next 12 months, organizations need to consider and address various legal and ethical implications, such as privacy, accountability, and human rights implications, among others.

"AI agents and humans will coexist and collaborate in various configurations. Agents prioritize tasks and recommend actions for humans, while humans guide agents, providing feedback or approvals before actions are taken."

Director of AI/ML products at a large telecom organization

"Organizations should first assess their processes and even overall ways of working within their business domains, to determine where AI agents can be most effectively integrated, ensuring they complement human workers to reach business goals in the most efficient way, rather than just displace them. This requires a profound transformation of work itself."

Anne-Laure Thibaud

Executive Vice President – Head of AI First Business & Analytics Global Practice
Capgemini

AI will perform tasks, rather than taking over entire roles

78%

of organizations are **likely to invest in AI agents to perform specific tasks** for their employees in the next 3-5 years

31%

of organizations are **likely to invest in AI agents to take on a full employee role** in the next 3-5 years

20% of all processes will be automated by AI agents at Level 3 or higher autonomy over the next three years.[28]

58% of organizations agree that, in the next 3-5 years, AI agents will take over individual tasks, rather than entire roles.

Yet **62%** of organizations report that their employees are concerned about the impact of AI agents on jobs and careers.

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 845 recontacted organizations that are at least exploring Gen AI capabilities.

"For many jobs, AI will only automate or augment 20-30% of tasks. So, there's a huge productivity boost, but people are still required for the remaining 70% of the role."

Andrew Ng

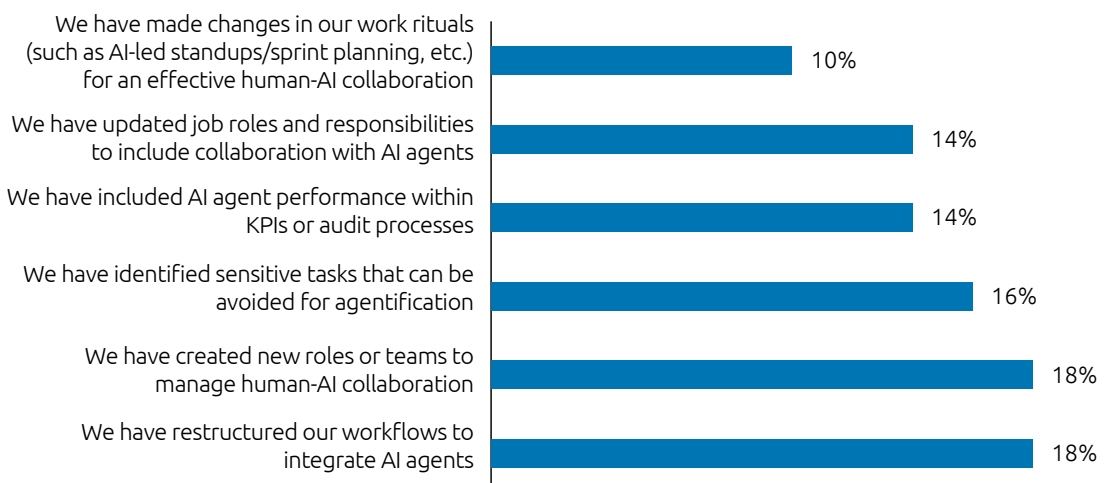
Founder of LandingAI and Managing General Partner, AI Fund

Source: Capgemini Research Institute, Conversations for Tomorrow Edition 9, October 2024.

But organizations are underprepared for dynamic human-AI collaboration

Only a minority have taken steps to redefine responsibilities, restructure workflows, and create new performance metrics for an effective human-AI collaboration

Percentage of organizations who agree with the statements below



Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 974 organizations (including 712 recontacted organizations) that using or planning to use AI agents.

67%

of organizations agree that they **will require restructuring** to enhance human-AI collaboration

59%

agree that, owing to the rise of AI agents, their **organizational structure will evolve** from the classic pyramid in the next 3-5 years

Only

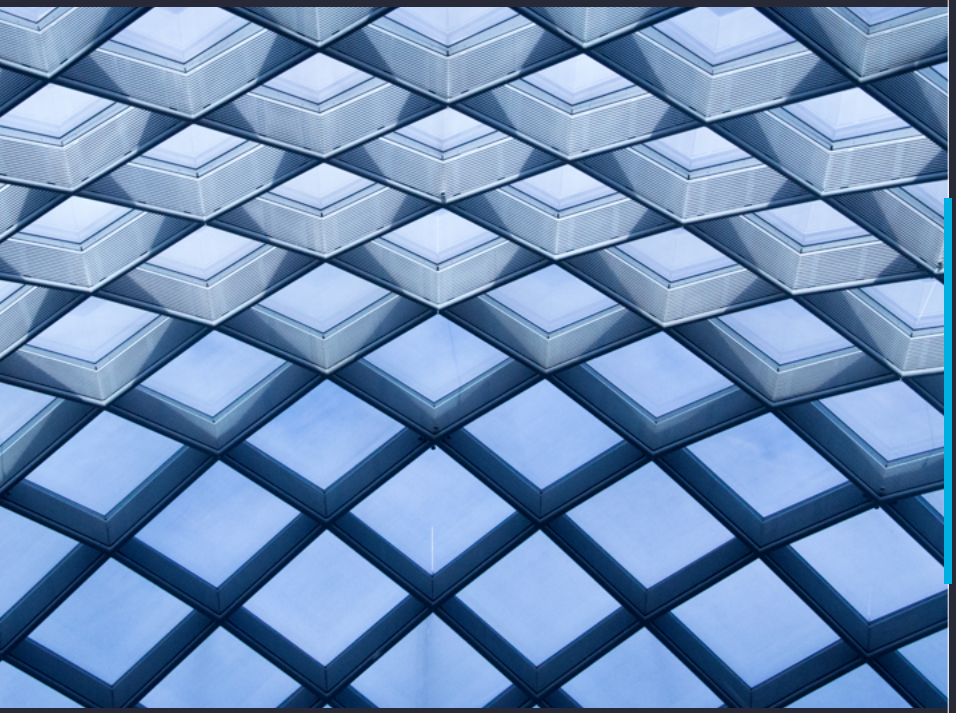
28%

of organizations feel prepared with the skills and expertise to effectively manage and deploy the potential of AI agents.[29]

"Effective integration of AI agents into the workforce demands an AI resource management structure."

Steve Jones

Executive Vice-President, Data Driven Business and Gen AI
Capgemini



06

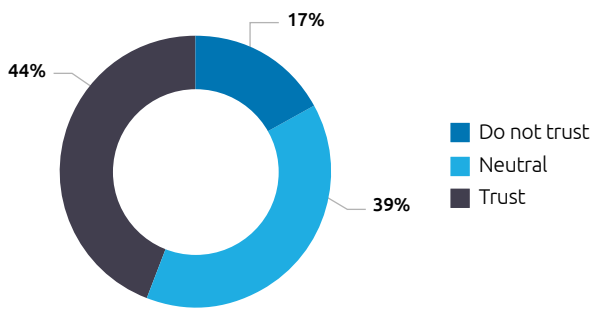
Trust in AI

Undermined by governance gaps

A trust gap is limiting AI from scaling

Only around two in five organizations have overall trust in Gen AI for decision making

Percentage of organizations responding to the question: "Do you trust Gen AI for decision making?"



Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

Top factors that are limiting trust in AI

65%	Security concerns
62%	Privacy concerns (failure to acknowledge limitations or refuse uncertain answers)
51%	Risk of biased outputs
47%	Lack of transparency and inability to verify sources

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 567 organizations that are at least exploring Gen AI capabilities and do not trust Gen AI for decision making or are neutral.

71%	say they cannot fully trust an autonomous AI agent for enterprise
69%	say they have retained human expertise in their operational flow in case of failure of agents to execute a task successfully
46%	are concerned that use of AI agents can have unforeseen consequences and unexpected decision-making resulting from untraceable actions

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

Balancing trust in AI with critical oversight is key

"Trust in AI begins with intentional design—not just to perform, but to protect and empower. It demands traceable and explainable model behavior, enforceable guardrails, and resilient architectures built for adversarial robustness and secure deployment. Agentic systems must remain auditable, compliant, and under meaningful human oversight—by default, not exception."

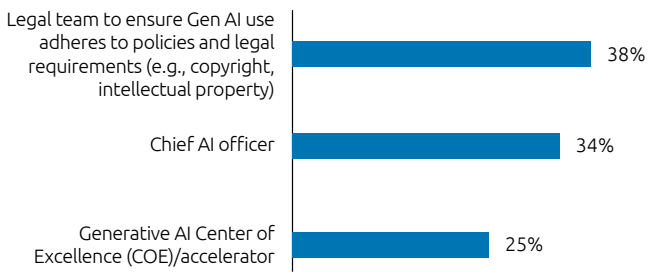
Sergey Patsko

Vice-President, Data and AI Group Offer Leader
Capgemini

Governance models have not kept pace with AI adoption

A minority have set up AI governance bodies

Percentage of organizations that already have the below



Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 962 recontacted organizations that are at least exploring Gen AI capabilities.

46%

of organizations have established a governance policy for their AI systems

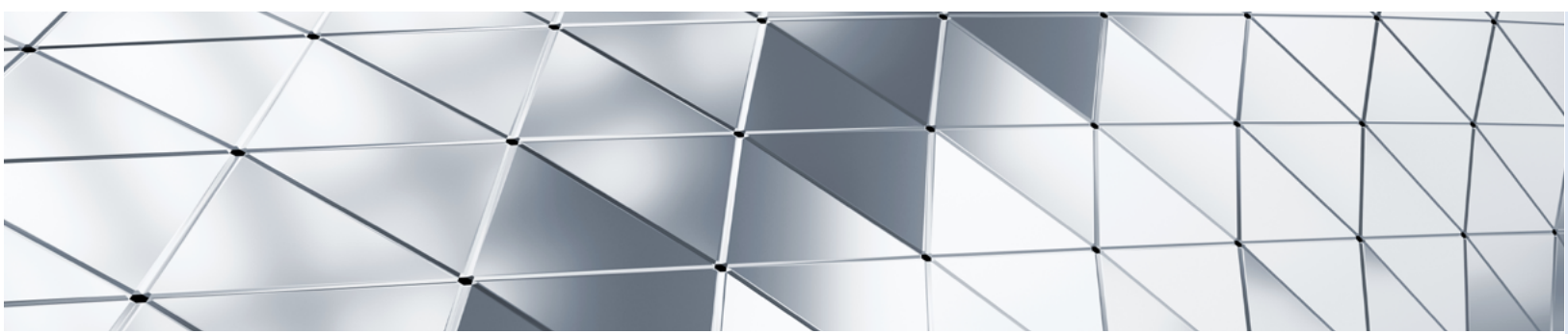
Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

Of those organizations which have an AI governance policy,

47%

say employees seldom follow it

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 473 organizations that have established a governance policy for their AI systems.



47%

say that the governance of AI is inconsistent across various business functions in their organization

"As AI becomes integral to business operations, organizations should establish dedicated AI Centers of Excellence (COEs) led by C-suite executives. These COEs should be staffed by a diverse team of AI specialists, domain experts, and program managers. The key is to deploy a lean, cross-functional team that can create and enforce guidelines for AI tool usage, data governance, and risk management frameworks."

Valentin Marguet

Powertrain Project Lead in the automotive industry

Source: Capgemini Research Institute, Gen AI at Work, October 2024.

Governance backed by ethical considerations is in the early stages

Percentage of organizations who agree with the statements below

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

"An ethics committee dedicated to overseeing the responsible use of AI can help reduce bias, ensure consistent and high-quality outputs, and address ethical concerns."

Kishore Pandrangi
Global Director of Customer Success
Google

Source: Capgemini Research Institute, AI in Action, June 2025.

Organizations have started to develop ethical guidelines and principles around the use of AI

70%

are establishing guidelines and criteria around **when to use Gen AI**

68%

are establishing guidelines and policies for the **ethical and legal use** of Gen AI tools by employees, in alignment with the organization's values and mission

54%

have a formal policy or framework governing the use of **personal AI agents***

*Note: By 'personal AI agents' we mean *AI agents owned and operated by individuals/employees, rather than the organization.*
Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

JP Morgan

now requires suppliers to demonstrate responsible AI practices by providing comprehensive documentation of their systems, which includes details of training data, model development processes, fairness assessments, and ongoing monitoring procedures. Additionally, the company has a 200-person AI research group, including an ethics team, to work on the company's AI initiatives.[30]

Unilever's

AI assurance function evaluates new AI applications for risk in effectiveness and ethics. Individuals submit a questionnaire, which an AI application assesses to approve or flag potential issues. This process ensures ethical alignment before deployment.[31]

Developing sustainable Gen AI

Organizations acknowledge the large environmental footprint of Gen AI

54%

of organizations agree that Gen AI has a higher carbon footprint than traditional IT programs

However, they are struggling to measure it

20%

of organizations measure the specific environmental footprint of their Gen AI

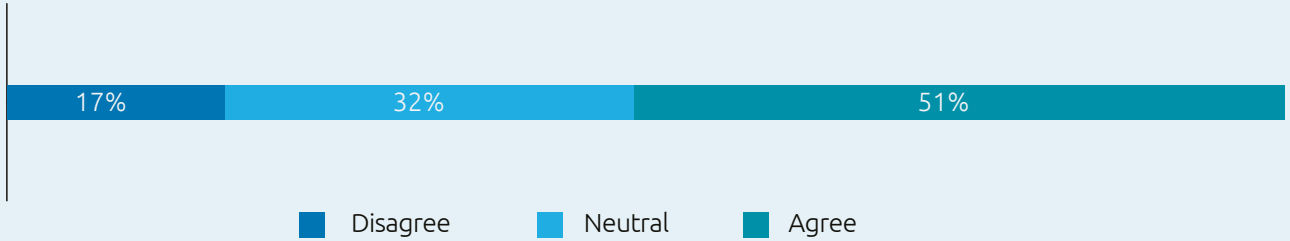
78% say the lack of transparency from hyperscalers/Gen AI model providers in disclosing the energy/carbon footprint of foundational models is a challenge to measurement

However, only **15%** say they include sustainability as a key criterion in vendor selection for all Gen AI-related requirements[32]

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

Tapping into Gen AI's potential by investing in the right use cases can accelerate sustainable business value

Percentage of organizations agreeing with the statement: "Benefits from Gen AI outweigh the negative impacts it has on the environment"



Startup **GreenMetrica** has launched AI agents to help organizations with compliance and reporting, such as Corporate Sustainability Reporting Directive (CSRD), optimize operations and supply chains to reduce carbon impact and enhance environmental data quality.[33]

Automaker **Toyota** is investing heavily in Gen AI techniques. It has developed a text-to-image tool that applies engineering constraints to early design sketches. It also accepts parameters such as aerodynamic drag as input to assist designers in creating fuel-efficient vehicles with fewer iterative cycles.[34]

Canadian startup **BrainBox AI** uses Gen AI to reduce the carbon footprint of commercial buildings. The company uses historical data to predict interior building temperatures, cutting heat, ventilation, and air-conditioning (HVAC) costs by up to 25% and greenhouse gas (GHG) emissions by 40%.[35]

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

"AI can be both a transformative tool and a sustainability enabler – but only if we approach it with transparency, governance, and a clear business-to-planet strategy."

Christopher Scheefer
Global Sustainability Lead for Data and AI
Capgemini

How to create responsible Gen AI for sustainable business value

Evaluate Gen AI partners and models on sustainability parameters

Monitor your Gen AI's environmental footprint

Implement sustainable practices such as using smaller and task-specific models, model-optimization techniques, prompt caching, as well as investing in green data centers

Scale the right use cases that accelerate a sustainable business value at a minimum environmental cost

Develop the right data and tech foundations

Set governance for sustainable Gen AI

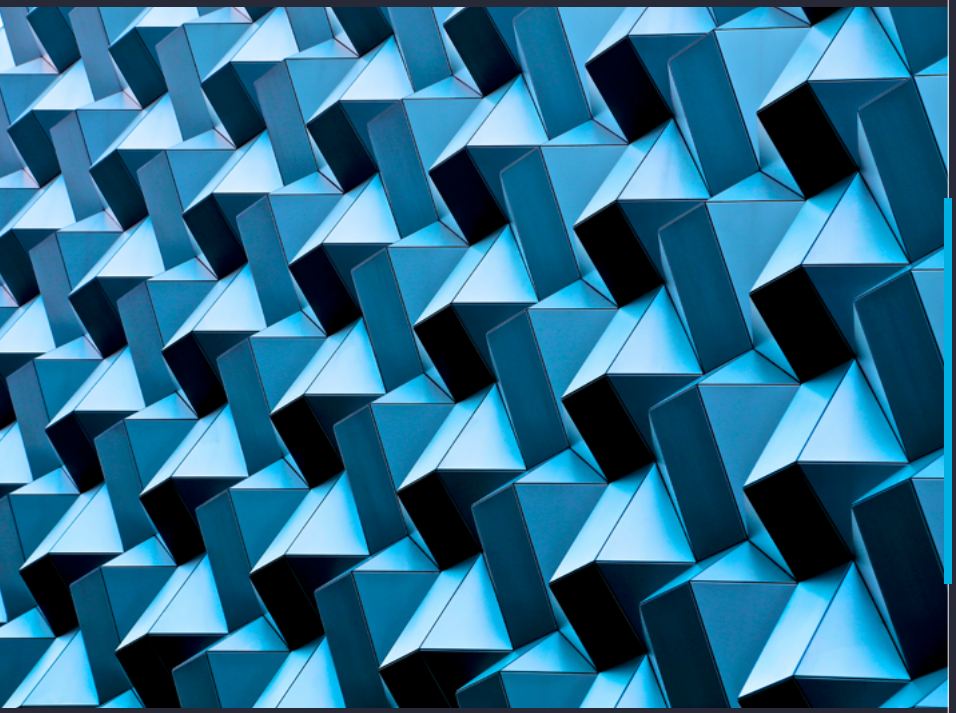
62% of organizations believe that setting the right guardrails and governance for sustainable development/deployment of Gen AI would reduce its environmental impact.

Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,020 organizations that are at least exploring Gen AI capabilities.

"It is urgent for businesses to embed sustainability into their AI strategies. By using smaller models, renewable energy, and transparent practices from AI and Gen AI vendors, we can mitigate environmental impacts while harnessing AI to drive both innovation and sustainability."

Vincent Charpiot

Head of Group Sustainability
Business Accelerator
Capgemini



07

Generating value with AI

To deliver business value through AI, organizations need to act on key strategic dimensions:

Architect the right processes, tech, data, and platforms for scalable AI

- Redesign processes to deploy AI effectively
- Develop a framework to identify the right blend of AI technology for your business and industry needs
- Build robust data and tech ecosystems for scalable and responsible AI
- Embrace 'platformization' for scaling AI

Reinforce trust with strong AI governance

- Ensure AI operates within defined scope of execution and actions remain traceable and explainable to earn trust
- Establish robust, cross-functional AI governance backed by ethical considerations
- Set up a strong framework for data governance and management

Design interactions between humans and AI across workflows, decision-making, and culture

- Rethink workforce planning, roles, and career paths
- Prioritize skill development and cultural transformation
- Adapt practices, processes, and operating models for human-AI teams
- Redefine performance measures to gauge hybrid performance

Amplify value creation with AI: *Accelerate innovation, lower costs, and create new revenue streams and business models with AI*

Source: Capgemini Research Institute analysis.

1. Architect the right processes, tech, data, and platforms for scalable AI

Redesign processes to deploy AI effectively

- **Start with the process, not the technology –** Map all your existing processes:
  - Eliminate
  - Standardize
  - Optimize
  - Adjust
- **Scope the hyper-automation areas**
- **Move from incremental automation to a deliberate orchestration** of AI agents, Gen AI models, and traditional AI systems

Develop a framework to identify the right blend of AI technology for your business and industry needs

- A convergence of traditional AI, Gen AI, Agentic AI, and technologies such as robotic process automation (RPA), knowledge graph, etc., can unlock new levels of efficiency. Use a **structured framework to select the right AI mix** based on:
  - Volumetrics
  - Decision definitions
  - Data quality, sources, and availability
  - Digitalization of communication and processing channels
  - Stability and standardization of business processes
  - Number of exceptions and error rates
- Make **informed, context-specific decisions about whether to build, buy, or adopt a hybrid approach** for AI implementation

Build robust data and tech foundations for scalable and responsible AI

- **Design data to be individually valuable, interoperable, and composable** – to enable seamless data exchange across AI, other tools/systems, business functions, and external ecosystems
- Invest in **modern data architecture** such as vector databases, real-time data pipelines, data mesh, and scalable data lakes
- **Apply AI to modernize data foundations**
- Continuously **upgrade technology infrastructure** to support scalable AI agent deployment
- Address **cybersecurity and privacy risks** by embedding compliance with data privacy laws (e.g., GDPR, HIPAA), using secure storage solutions, and protecting sensitive data with encryption.

Embrace 'platformization' for scaling AI

- **Build AI-native platforms** that are modular, composable, and designed for autonomous execution – to facilitate effective scaling of AI while ensuring flexibility, compliance, operational efficiency, value tracking, and cost-effectiveness
- **Abstract orchestration, memory, and tool interfaces for reusability**
- Design for **interoperability**
- Use established **partnerships** within the ecosystem to manage external platforms effectively

Source: Capgemini Research Institute analysis.

"The future of enterprise operations lies in the seamless integration of AI agents, other forms of AI, and automation, in tandem with and under the oversight of human co-workers."

Itziar Goicoechea-Martinez

Senior Director, AI and Generative AI Offer, Capgemini

2. Reinforce trust with strong AI governance

Ensure AI operates within defined scope of execution, and actions remain traceable and explainable to earn trust

- Clearly **articulate the boundaries of AI decision-making**, including levels of autonomy, agency, and authority.
- Ensure that AI agents are **designed to reason in accordance with human intent**, organizational brand guidelines, and ethical standards.
- Deploy robust **observability frameworks** that provide visibility into AI decision-making.
- Define **clear goals and scope of execution** for AI and implement continuous monitoring to ensure purposeful and aligned outcomes.
- Prioritize **cybersecurity and privacy controls** and escalation triggers.

Establish robust, cross-functional AI governance backed by ethical considerations

- Establish **cross-functional AI governance** bodies with leaders from IT, legal, data governance, ethics, compliance, and senior management to formulate policies, oversee implementation, manage risks, and drive continuous improvement.
- **Operationalize ethical principles** to move beyond policy creation by integrating ethical guidelines into daily workflows.
- Conduct **regular audits of AI systems** for privacy risks, bias, fairness, and regulatory compliance.
- Maintain **mechanisms for human oversight**, especially for high-impact or high-risk AI decisions.
- **Integrate AI training** – including ethics, safety, and governance – into employee development.

Set up strong framework for data governance and management

- Implement **strict data-validation protocols** around the source, usage rights, access controls, and processing methods for each dataset used by AI.
- Standardize **AI-specific data governance protocols** for consistency, transparency, and accountability throughout the data lifecycle – collection, processing, storage, and sharing.

Source: Capgemini Research Institute analysis.

"Trust in Agentic AI grows through experience. By starting with human-in-the-loop models and observing consistent accuracy, transparency, and adherence to guardrails and instructions, organizations build the confidence to embrace higher levels of autonomy for both internal employee and external customer experiences."

Susan Emerson

Senior VP, AI Product, Salesforce

Source: Capgemini Research Institute, Rise of Agentic AI, July 2025.

3. Design interactions between humans and AI across workflows, decision-making, and culture

Rethink workforce planning, roles and career paths

- Establish **formal roles for AI within team structures** with well-scoped mandates, defined goals, clear business ownership, and accountability, and buy-in from human team members
- Consider creating **AI personas**, assigning them appropriate responsibilities and integrating them into the team dynamic
- **Manage AI agents in the same way you manage human talent**, including onboarding, learning, upskilling, and performance measurement
- Clearly **redefine roles and responsibilities of human workers**
- Establish **clear career pathways for employees** to move between roles and departments

Prioritize skill development and cultural transformation

- Identify skill gaps related to these future roles and develop corresponding **training programs, mentorship initiatives, and job rotation plans**
- Focus on upskilling and reskilling on **fundamental skills** (such as data management, machine conversations), as well as **desirable soft skills** (such as critical thinking, ethical judgment, risk management, and emotional intelligence)
- Kick-off a long-term **cultural and behavioral transformation**

Adapt practices, processes, and operating models for human-AI teams

- Establish **clear accountability for decisions made by/with assistance of AI**
- Ensure **human oversight** is embedded in high-stakes or sensitive decisions
- Introduce protocols to **continuously monitor AI alignment** to intended business goals
- Establish a team dedicated to **AI resource management** to systematically allocate and manage intelligent resources (as with human resources)
- Retain **strategic fluidity and mold the organizational pyramids** into something more agile, adaptive, and collaborative

Redefine performance measures to gauge hybrid performance

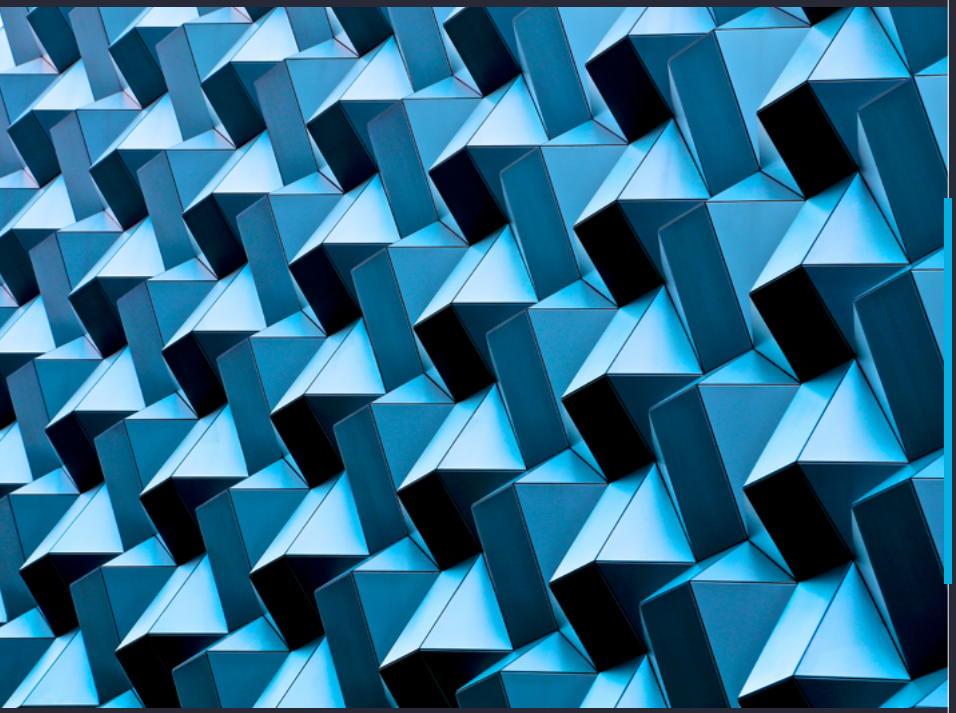
- Create **joint productivity metrics** to measure outcomes delivered through human-AI collaboration
- **Evaluate AI evaluation metrics** – evaluating how it contributes to quality, speed, and innovation
- Assess how well **humans and AI collaborate**
- Track how effectively **employees adapt their roles and skillsets** in response to working with AI

Source: Capgemini Research Institute analysis.

"Organizations that treat AI agents only as a productivity tool are missing the point. Those that don't redefine roles, incentives, team structures, and leadership models may soon find themselves irrelevant."

Marjolein Wenderich

Vice President,
Global MD – Workforce and Organization,
Capgemini



08

Research methodology

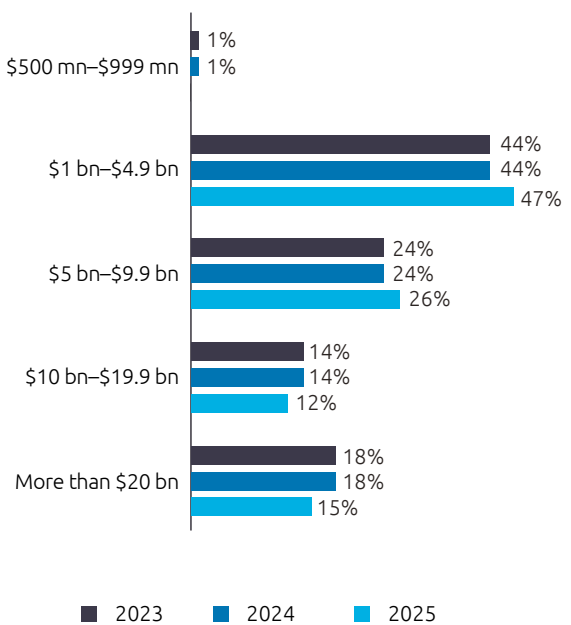
Research methodology (1/4)

We conducted a global survey of 1,100 executives at organizations with more than $1 billion in annual revenue, across 15 countries: Australia, Brazil, Canada, France, Germany, Italy, India, Japan, the Netherlands, Norway, Singapore, Spain, Sweden, the UK, and the US. Organizations operate across 11 sectors. Nearly all (93%) of these organizations have started to explore Gen AI. We conducted the global survey in May and June 2025. Executives surveyed are at director level and above and represent diverse functions.

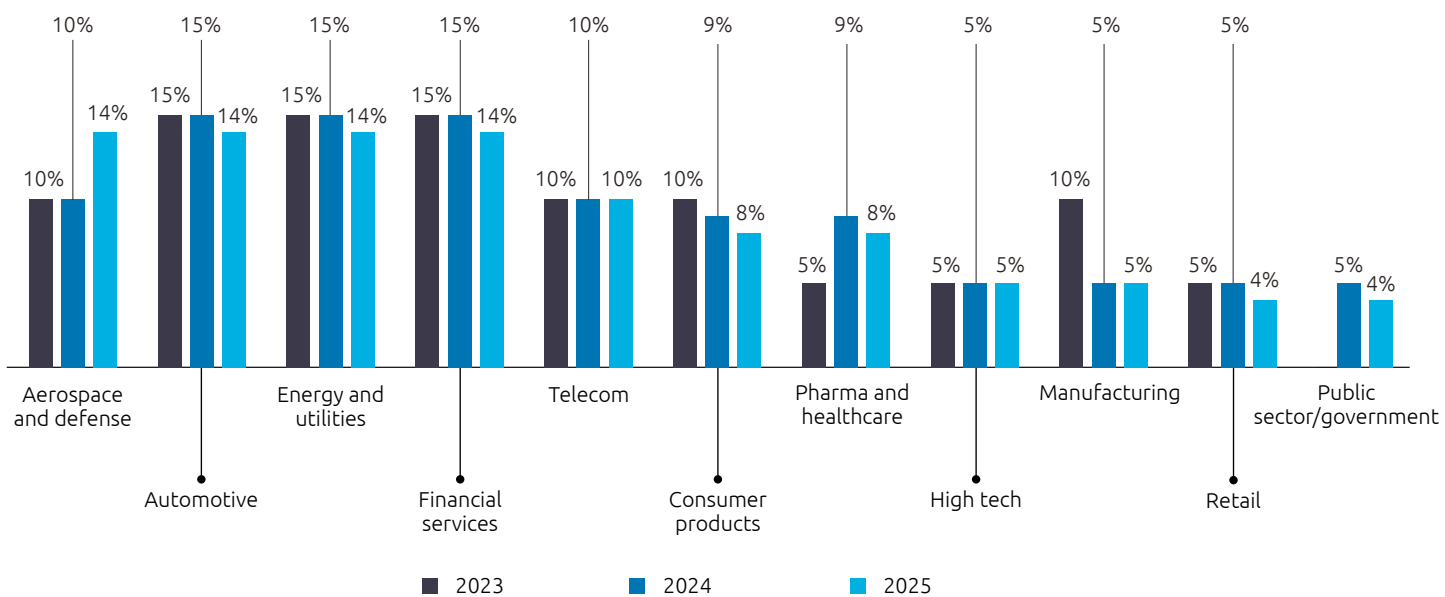
The study findings reflect the views of the respondents to our online questionnaire for this research and are intended to provide directional guidance. Please contact one of the Capgemini experts listed at the end of the report to discuss specific implications.

Research methodology (2/4)

Organizations by annual revenue



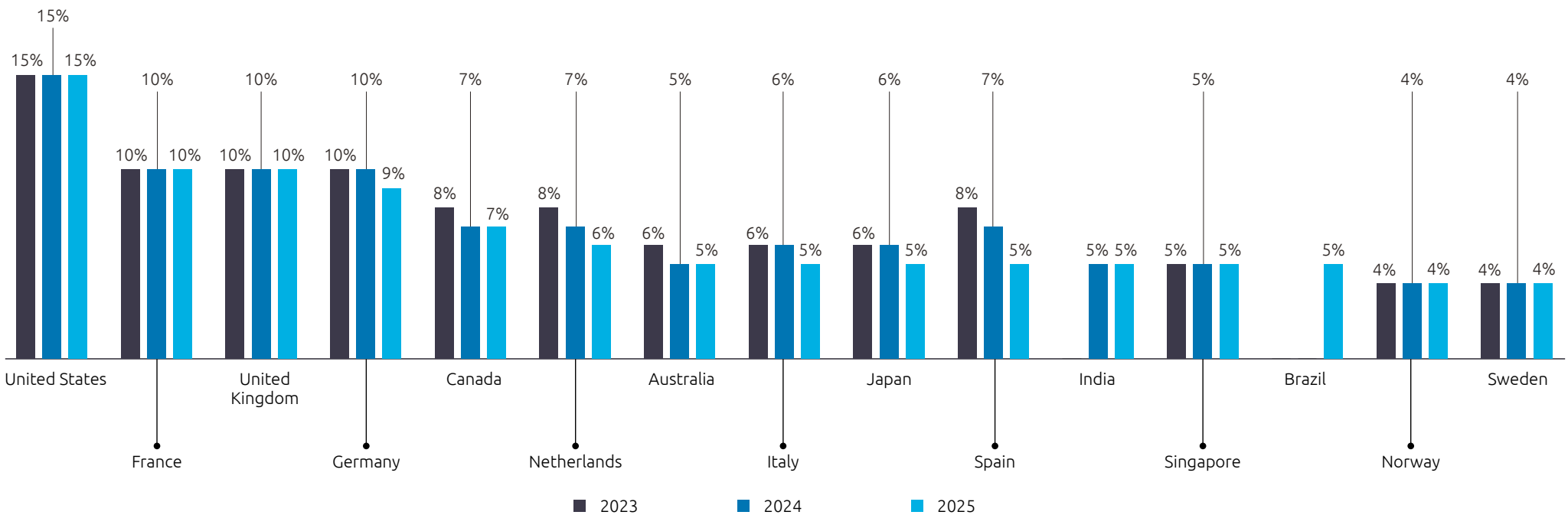
Organizations by sector



Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,100 organizations.

Research methodology (3/4)

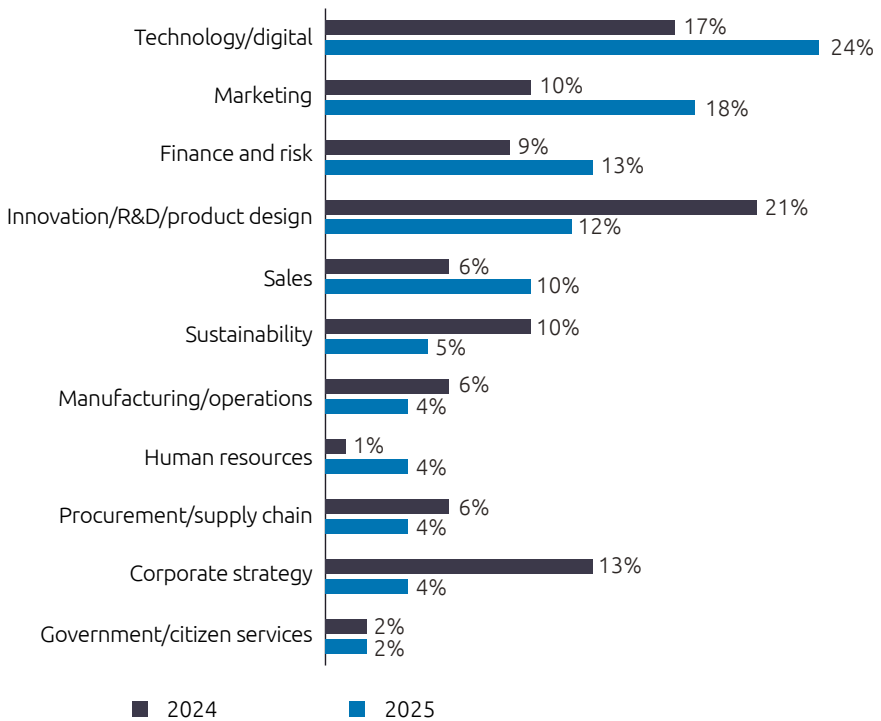
Organizations by country of headquarters



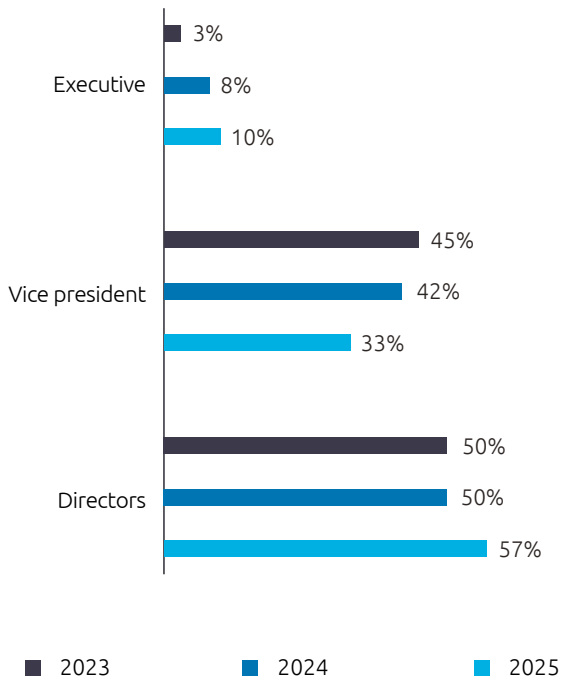
Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,100 organizations.

Research methodology (4/4)

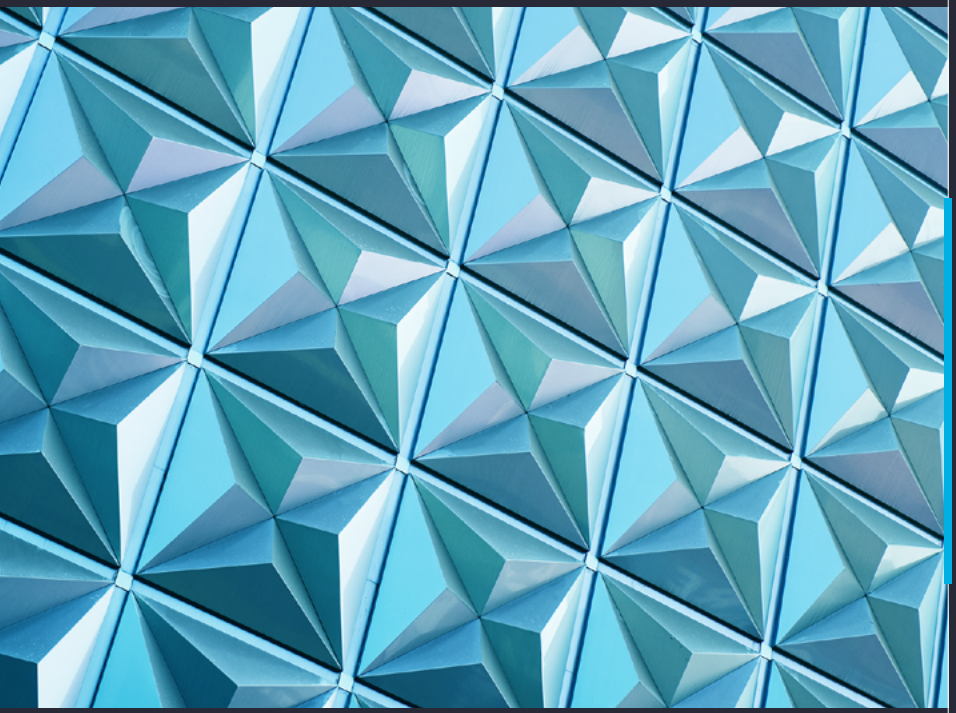
Respondents by function



Respondents by title



Source: Capgemini Research Institute, Generative AI executive survey, May–June 2025, N = 1,100 organizations.



09 Appendix

How do AI agents differ from AI/Gen AI assistants?

AI agents	Key features	AI/Gen AI assistants
■ High autonomy and agency: operate independently	Autonomy	■ Incapable of operating autonomously
■ Take prompted and unprompted action to achieve specified goals within a workflow, handling complex tasks requiring specialized capabilities	Action	■ Take actions based on user prompts and predefined logic; handling discrete sub-tasks (generate content, images, code, etc.)
■ Anticipate needs and take initiative	Proactivity	■ Respond to explicit prompts
■ Learn and adapt continuously; often with long-term memory and contextual awarness	Learning ability	■ Pre-trained, with limited to no real-time learning or long-term memory retention
■ Can be built on AI or non-AI systems; does not necessarily use Gen AI or LLMs	Underlying tech	■ Built on AI/ML, mainly uses pre-trained data
■ Interact with external and internal data, tools, and systems in real time; better positioned to handle errors	Interactivity	■ Cannot perform real-time interactions; can access external tools like web search when enabled and have limited error-handling capabilities
Manage the entire campaign lifecycle autonomously – customize content to audience, test creatives, launch campaigns, dynamically adjust targeting and messaging based on real-time performance	**Example**	*Generate campaign briefs based on direct user prompts and existing templates*

Source: Capgemini Research Institute analysis.

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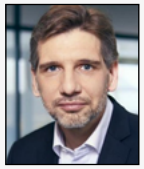

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This report is a part of Capgemini Research Institute's series on Generative AI

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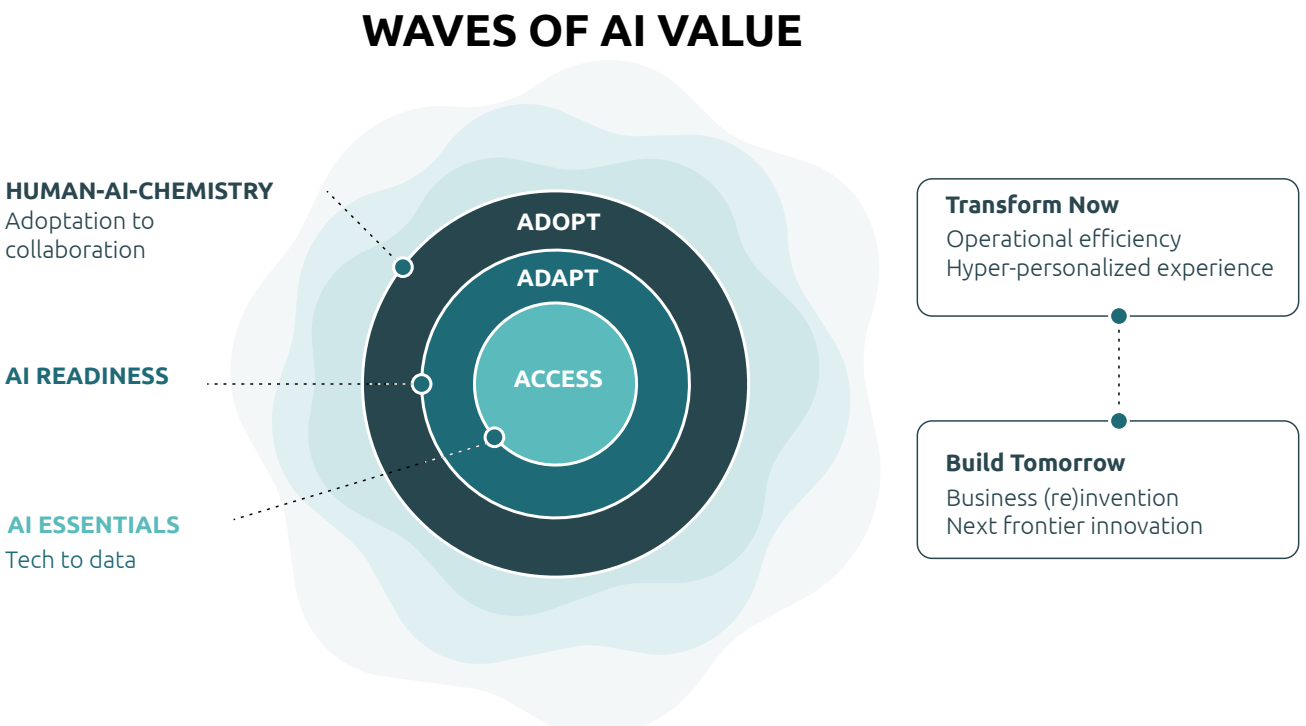
Resonance AI Framework by Capgemini

The Resonance AI Framework by Capgemini provides a sequential approach to the successful conceptualization, structuring, and implementation of AI-driven transformation. It helps business leaders realize AI's potential and achieve market leadership, regardless of the industry. Anchored in transformation strategy, the framework helps integrate operations and culture while accelerating AI value creation – to both transform today and build for tomorrow.



AI essentials

To access the transformative power of AI, organizations must establish 'Intelligence-as-a-Service.' That includes scalable and robust enterprise data foundations combined with advanced language and vision models, and applications with built-in AI capabilities. These provide the foundation to build, operate, and scale AI with real, enterprise-specific impact.

AI-readiness

Adapting AI to organizational context requires the right enablers and guardrails to secure, govern, customize, and operationalize AI. Success hinges on the ability to empower an organization to scale AI while ensuring secure, ethical, and aligned organizational AI capabilities deployed on trusted data foundations and managed as business resources.

Human-AI chemistry

Organizations adopt hybrid forms of collaboration by designing the clear roles and intuitive interactions that enable seamless collaboration between humans and AI. This mutual reliability and collaboration defines 'human–AI chemistry' – the new alchemy of innovation and the defining success factor in your AI journey.

Waves of value

With the technological, governance, and collaborative foundations in place, AI value creation is poised for acceleration across an organization, ready to deliver the operational efficiency, personized experiences, business reinvention, and next-frontier innovation that enable an organization to transform today and build for tomorrow.

Contact us

About the Capgemini Research Institute

The Capgemini Research Institute is Capgemini's in-house think tank on all things digital. The Institute publishes research on the impact of digital technologies on large traditional businesses. The team draws on the worldwide network of Capgemini experts and works closely with academic and technology partners. The Institute has dedicated research centers in India, Singapore, the United Kingdom, and the United States. The Institute was ranked #1 in the world for the quality of its research by independent analysts for six consecutive times – an industry first.

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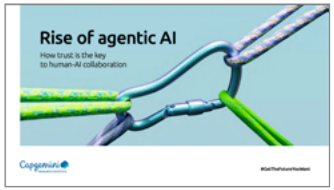

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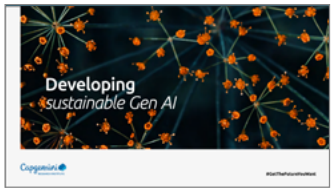
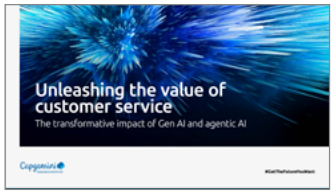


Developing sustainable Gen AI



Unleashing the value of customer service

Generative AI in cybersecurity

Data powered enterprises 2024

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Capgemini is a global business and technology transformation partner, helping organizations to accelerate their dual transition to a digital and sustainable world, while creating tangible impact for enterprises and society. It is a responsible and diverse group of 350,000 team members in more than 50 countries. With its strong over 55-year heritage, Capgemini is trusted by its clients to unlock the value of technology to address the entire breadth of their business needs. It delivers end-to-end services and solutions leveraging strengths from strategy and design to engineering, all fueled by its market leading capabilities in AI, cloud and data, combined with its deep industry expertise and partner ecosystem. The Group reported 2024 global revenues of €22.1 billion.

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