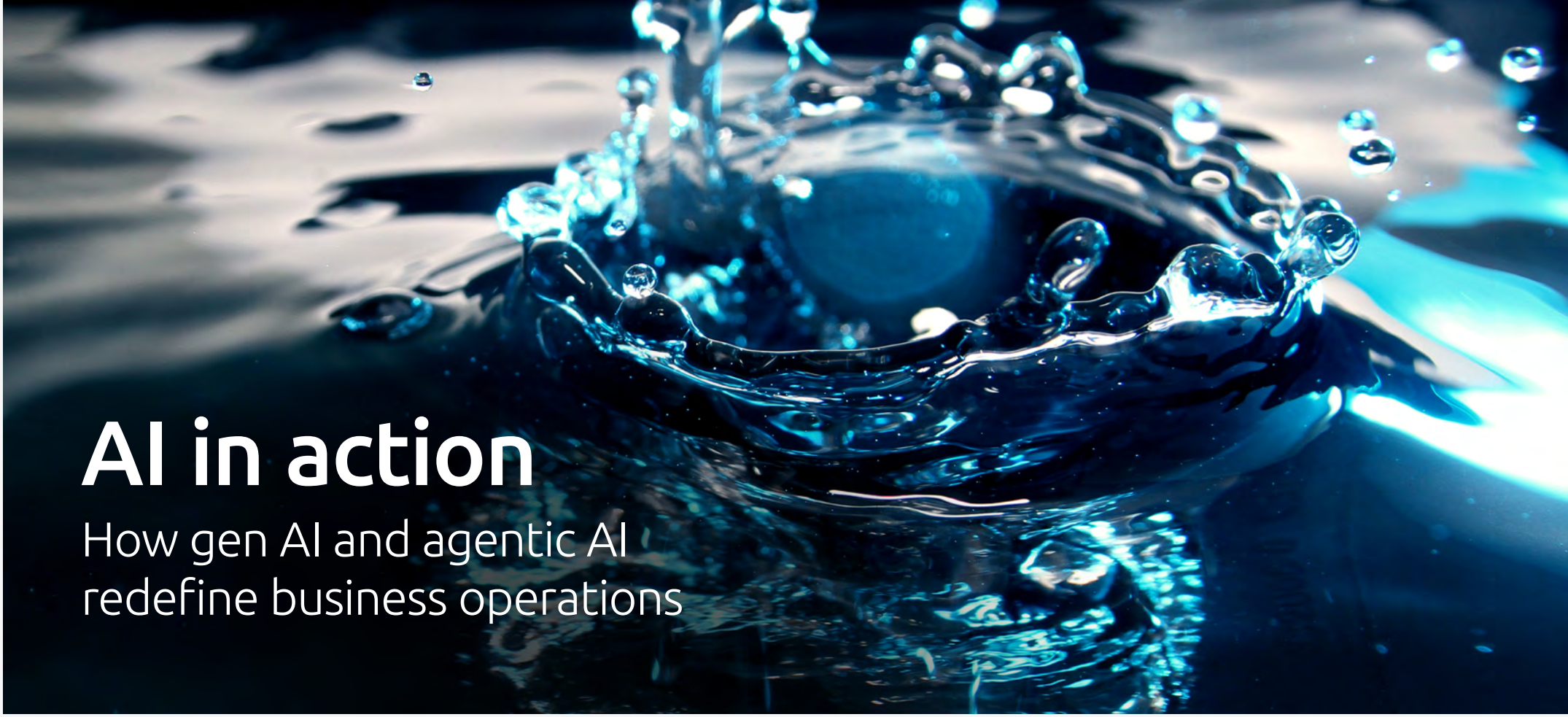

AI in action

How gen AI and agentic AI redefine business operations

Capgemini RESEARCH INSTITUTE

#GetTheFutureYouWant

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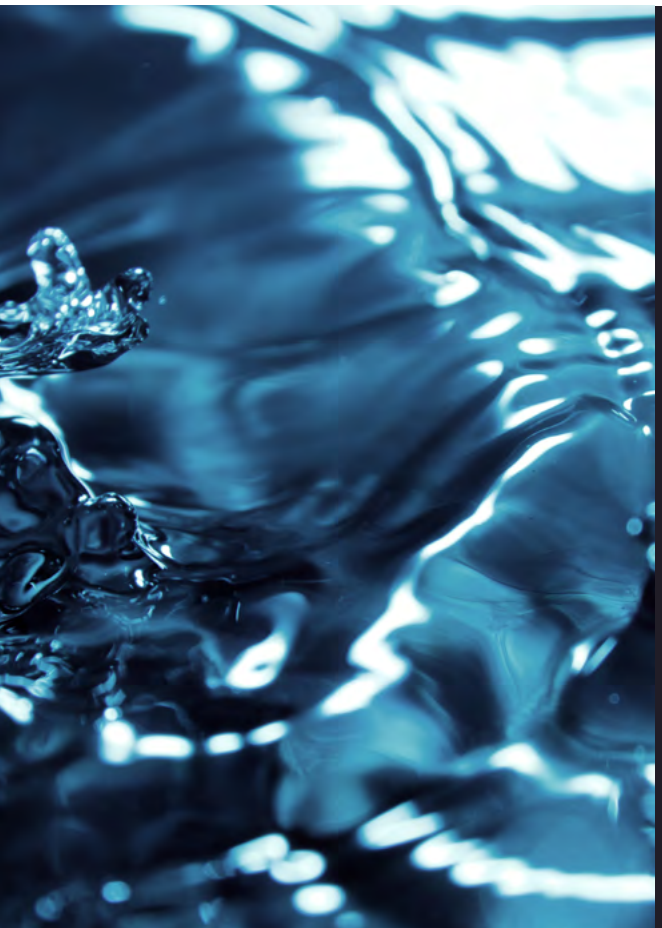


Who should read this report and why?

This report is primarily intended for senior executives in business operations—particularly those leading functions such as supply chain, procurement, finance, and customer or people operations. It will also be valuable to CTOs, CDOs, and other technology and innovation leaders exploring the strategic role of Gen AI and agentic AI in enterprise transformation.

This report offers unique, data-driven insights into how Gen AI and agentic AI are being adopted across industries, with a focus on ROI trends, emerging use cases, and their tangible impact on core business functions. It also explores workforce implications, governance best practices, and scaling strategies—making it a critical resource for leaders looking to move beyond experimentation and drive measurable value from AI investments in business operations.

What is AI, Gen AI, and agentic AI in business operations?

In this report, "AI, Gen AI and agentic AI in business operations" refers to the integration of **traditional AI, AI-enhanced process automation (IPA), generative AI (Gen AI),** and **agentic AI** into organizational workflows to improve efficiency, decision-making, and innovation.

Key terminology used in the report:

- **Artificial intelligence (AI)** is a collective term for the intelligent capabilities in learning systems, typically categorized into machine vision and sensing, natural language processing (NLP), predicting and decision-making, and acting and automating.
- **Generative AI (Gen AI)** is a subset of AI that harnesses the power of transformer models and massive scaling of data and compute to plan, reason, and create generative features including text, image, and video.
- **AI agent** is a software program that can interact with its environment, collect data, and use this to autonomously perform tasks to meet predetermined goals.

As an evolution from technologies like robotic process automation (RPA) and machine learning (ML), AI agents can, perceive, reason, and act in changing environments to achieve their goals. AI agents employ a range of advanced technologies to interact with users and perform tasks autonomously and effectively. Large language models (LLMs) are often the primary interface between AI agents and users. An agent can understand and generate human-like text or verbal responses using natural language processing (NLP), making human-AI interactions more natural and efficient.[1]

- **Agentic AI** is the deployment of AI agents in a real-world environment where agents can detect signals, plan and reason, make autonomous decisions, and achieve set goals without human intervention. (Note that the definition of this term is not yet stable across the industry and may vary between different projects and contexts.)

Note: In this report, the term "AI" encompasses traditional AI, AI-enhanced process automation (IPA), Gen AI, and agentic AI collectively, unless explicitly stated otherwise.

Executive summary

Having shifted from experimental proofs of concept (PoCs) to in-production operational AI systems, businesses are beginning to realize the benefits. Our survey of 1607 organizations shows that, returns on investment (ROI) averaging an impressive 1.7x on AI investments in business operations.[a] Confidence in AI's commercial viability is growing, with 40% of organizations expecting positive ROI within one to three years and another 35% within three to five years based on our survey. AI agents and multi-agent systems deliver significant improvements in operational efficiency, cost reduction, customer satisfaction, and error reduction.

Investment in integrating AI into business operations is rising, with 62% of organizations increasing their Gen AI spending this year, and 36% allocating capital specifically to Gen AI. Three out of four executives prefer using proprietary models for AI implementation in operations, valuing high performance and easy integration with enterprise systems.

In 2025, Gen AI deployment in business operations surged, with 36% of organizations deploying the technology at a limited/full scale, up from 20% in 2024. Among these, 30% have integrated AI agents into their operations.

[a]**Business operations** encompass the coordinated activities and processes undertaken by various departments within an organization to produce, market, and deliver goods or services. These operations integrate functions such as customer service, product management, marketing, and supply chain management to ensure efficiency, profitability, and alignment with the organization's strategic objectives. In our research, we focus on **four** primary business functions: **supply chain and procurement, finance and accounting, people operations,** and customer operations, as these areas collectively represent the core operational pillars of most modern enterprises.

Executive summary

The use of AI agents, including multi-agent systems, has more than doubled, with 21% of organizations utilizing them in 2025 (compared with 10% in 2024). Reported adoption rates may be overstated due to varying definitions of AI agents versus Gen AI assistants. While surveys indicate strong momentum, client and partner feedback suggests actual AI agent adoption could be more limited. The survey's broad phrasing of "AI agent use" may include everything from pilots to full-scale deployments. Compared to current levels, agentic AI projects (in production) are expected to rise by 48% this year.

AI is reshaping business processes and functions such as supply chain management, finance, people operations, and customer operations, delivering significant efficiencies by embedding intelligence into core workflows.

In supply chain and procurement, AI enhances route optimization and warehouse design, streamlining fulfillment and reducing operational overhead. In people operations, Gen AI automates tasks like résumé screening and candidate matching, accelerating hiring cycles and lowering recruitment costs. These transformations are driving leaner, faster, and more cost-effective operations across the enterprise. By embedding a targeted set of AI capabilities into core business processes – such as procurement, customer service, supply chain optimization, and financial operations—organizations are achieving measurable efficiencies, leading to cost reductions ranging from 26% to 31%.

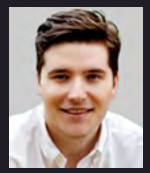
Executive summary

To develop AI-driven business operations, organizations must follow six essential steps:

- **Build a foundation of AI readiness:** Establishing AI readiness requires aligned leadership, strong governance, widespread AI literacy, digital business operations and robust data infrastructure to ensure scalable and effective AI initiatives.
- **Make the workforce AI-ready:** Successful AI integration depends on change management, cultural transformation, and empowering employees to collaborate effectively with AI.
- **Develop a strong approach to process redesign:** A strategic and structured process redesign embeds AI where it delivers the most value, driving efficiency and innovation.
- **Embrace agentic AI for transformational benefits:** Adopting agentic AI at scale through phased implementation enables operational transformation, better decision-making, and enhanced customer experiences.
- **Maintain a strict focus on cost containment:** Financial discipline in AI adoption—guided by metrics like cost per inference and ROI—ensures innovation remains economically sustainable.
- **Devise a strategy for scaling up AI-powered processes:** Scaling AI successfully requires a clear build-versus-buy strategy that balances innovation with operational stability and long-term adaptability.

We'd also like to thank the many industry executives who shared their valuable insights with us.

Anna Kopp
Digital Lead Germany, Microsoft – Germany



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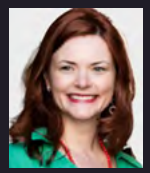
Enterprise Architecture Leader, UiPath – USA

Eric Pace
Head of AI, Cox Communications – USA

Kishore Pandrangi
Global Director of Customer Success, Google – USA



Nicole Onuta
Lead AI Risk Management, ING – Netherlands

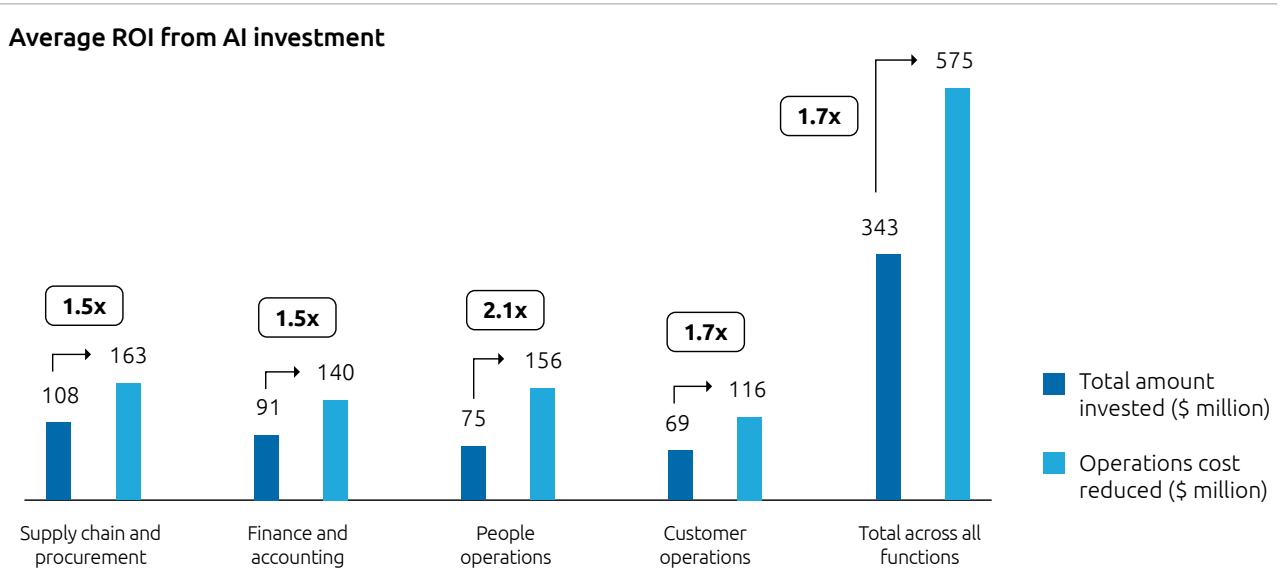
Dr. Walter Sun
SVP, Global Head of AI, SAP – USA

01 As organizations realize AI benefits, ROI concerns wane

Organizations report a strong 1.7x ROI from AI in business operations

In recent years, business leaders have raised questions about whether the substantial expenditure on AI and Gen AI will yield compensatory AI-driven benefits and returns.[2, 3] But organizations that have conducted pilot projects, achieved limited deployment, or scaled these use cases in various business functions have reported average **ROI of 1.7x**.

Figure 1.
Organizations achieve average ROI of 1.7x from AI investments in business operations



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 1,007 executives who are from business functions such as supply chain and procurement, finance and accounting, people operations and customer operations.

On average, around **40%** of executives anticipate achieving 10–20% improvements in key metrics such as insight accuracy, productivity, time to market (TTM), and customer and employee satisfaction over the next three years, compared with **32%** who experienced the same level of benefits in the past year. Another 20% of executives expect more than 20% improvement across the above mentioned parameters in next three year.

Two in five organizations (40%) tracking ROI expect to achieve positive ROI in one to three years

Around **40% of organization**s tracking ROI, expect to achieve positive ROI from AI within one to three years, reflecting growing confidence in the technology's commercial applicability. **Another 35%** anticipate realizing ROI within **three to five years**, highlighting a broader trend of strategic investment.

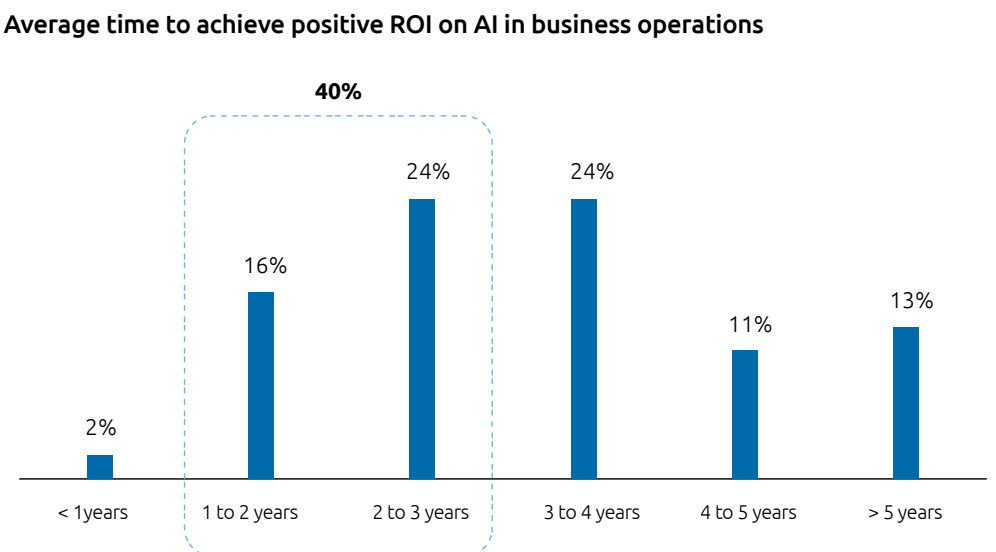
While timelines vary based on factors such as industry and use case complexity, most organizations are confident in AI's potential to drive significant business impact.

The senior director for global procurement analytics, data science and digital at a pharmaceutical organization says: *"AI significantly enhances cost savings and cost avoidance, which are crucial for supply chain efficiency. The ROI for AI-driven contract analysis and value leakage prevention surpasses 300%."*

40%

of organizations tracking ROI, expect to achieve positive ROI from AI within one to three years

Figure 2.
Around 40% of organizations who are tracking ROI expect to realize a positive ROI in one to three years



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 300 executives who are from business functions tracking ROI as a financial KPI to evaluate the success of AI and Gen AI initiatives.

This is consistent with recent estimates. Around half (49%) of US Gen AI decision makers expect their organizations to achieve ROI on AI investments within one to three years, while 44% say three to five years.[4]

Agentic AI in business processes will boost these benefits

AI agents are being adopted across enterprises, mid-market firms, and SMBs, but each segment is focusing on different priorities. Enterprises are leading adoption in operations and compliance-heavy areas, with 46% of use cases centered on functions like procurement, HR, and finance—where scale, control, and risk management are key. Customer service and sales are also emerging as important areas, reflecting growing interest in AI-driven engagement.[5] Improved customer satisfaction can be traced to AI agents' ability to provide personalized, round-the-clock service, instant responses, and seamless multichannel integration.

The magnitude of error reduction (+40%) is striking, especially given the complexity of tasks AI agents typically handle. This indicates a growing reliance on AI systems for operations where precision is essential.

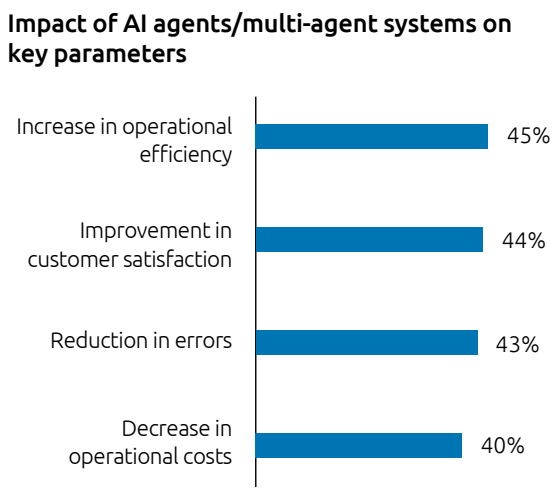
"AI agents are expected to drive efficiencies and reduce operational costs, with conservative estimates indicating a minimum of 10% efficiency gains, and optimistic projections reaching 25%"

Joji Philip
Director of AI/ML products, Ericsson

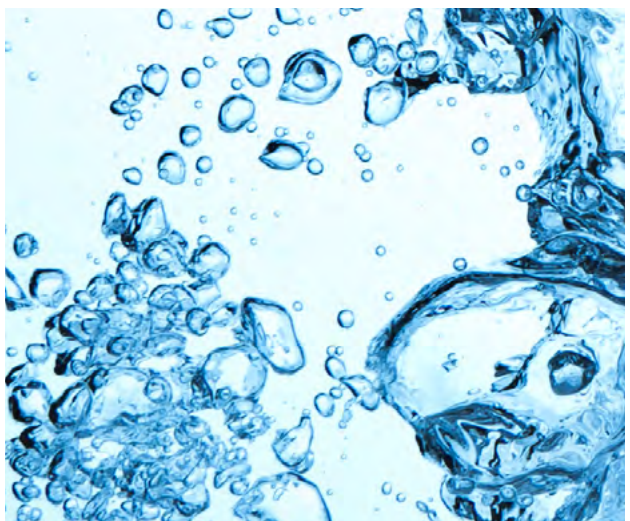
"Multi-agent systems allow tasks to be broken into specialized roles, improving efficiency and reducing errors. Agents can review each other's work to minimize hallucinations – a truly fascinating approach."

Daniel Vassilev
Co-Founder and Co-CEO,
Relevance AI

Figure 3.
AI agent/multi-agent systems result in improvements ranging from 40–45% across key parameters



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, **N = 125 executives who are involved in technology implementation, and Gen AI product owners/AI delivery managers who are utilizing AI agents/multi-agent systems.**



Initial results indicate up to a 40 – 45% improvement in key parameters following the deployment of AI agents and multi-agent systems. While these figures are encouraging, they must be contextualized within the current scope and maturity of implementation. A significant portion of the observed gains can be attributed to the automation of straightforward, repetitive tasks—representing early-stage efficiencies rather than long-term transformational impact. Furthermore, the underlying data may be subject to bias, as it is derived from a limited number of early adopters, many of whom operate in environments that are already conducive to AI integration. The sample size remains small, and large-scale deployments are still relatively rare, which limits the generalizability of these findings. As such, while the initial outcomes are positive, further validation through broader and more diverse implementations is necessary to establish consistent and scalable impact.

A FinTech organization implemented an error pattern detection agent that identified a 23% spike in payment-processing errors. The agent not only flagged the issue but also highlighted specific problematic code blocks, reducing debugging time from 12 hours to under two hours per incident, cutting overall error rates by 47% in three months.[6]

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. While not yet market-ready, YUM Brands, the world's largest franchise operator, evidently is an illustration of agentic AI potential in the industry.[7]

AI impact boosts investment

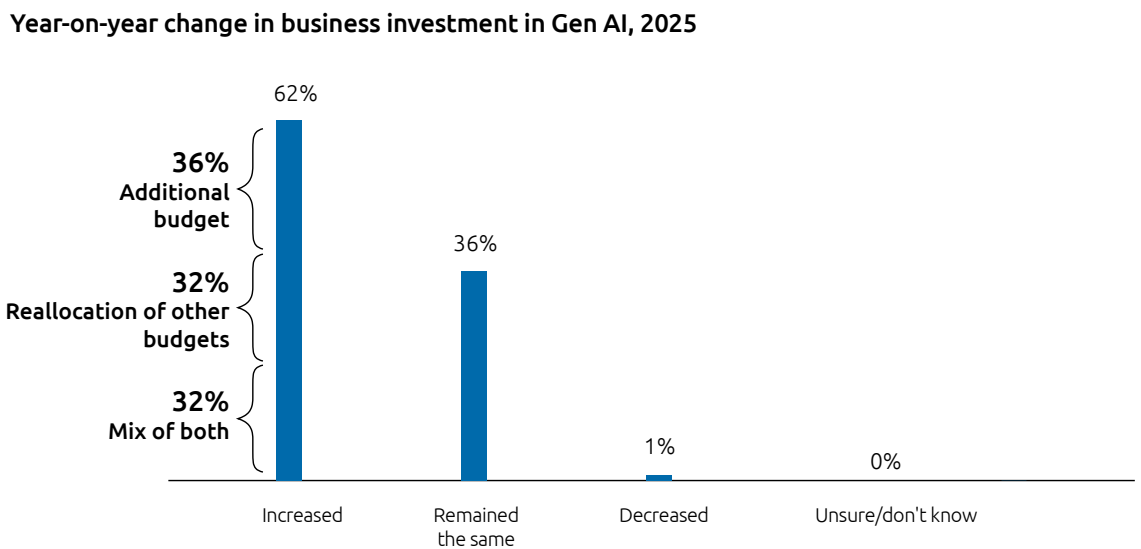
A significant majority of organizations surveyed, **around 62%**, have **increased** their investment in Gen AI, year on year. Among these, 36% have allocated additional investment capital to Gen AI. This shift also reflects a strategic reallocation of funds, with 33% of organizations diverting budget from other areas.

Even among organizations whose leadership are not strong advocates of Gen AI, 60% have increased their investments. **Gen AI is increasingly seen as a strategic investment to future-proof organizations against technological and market disruptions.**

60%

of organizations with **limited leadership support** have still increased their Gen AI investments

Figure 4.
Around 62% of organizations surveyed have increased investment in Gen AI



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 1,607 executives.

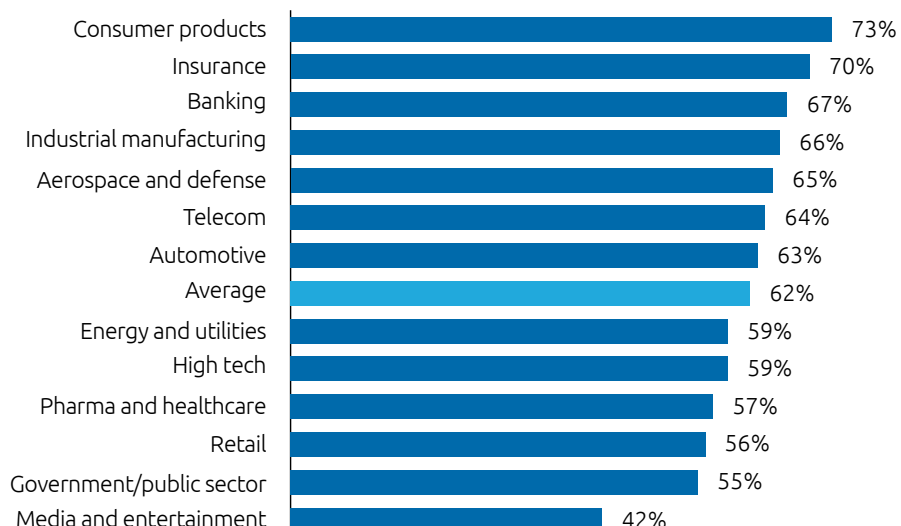
Across various industries surveyed, the five sectors showing the highest year-on-year rise in investment in Gen AI are consumer products (73% of executives), insurance (70%), banking (67%), aerospace and defense (65%), and telecom (64%).

73%

of consumer products organizations have increased their Gen AI investments compared with last year

Figure 5.
Nearly three-quarters of consumer products organizations have increased their Gen AI investments compared to last year

Percentage of organizations in industries surveyed who increased their Gen AI investments compared to last year

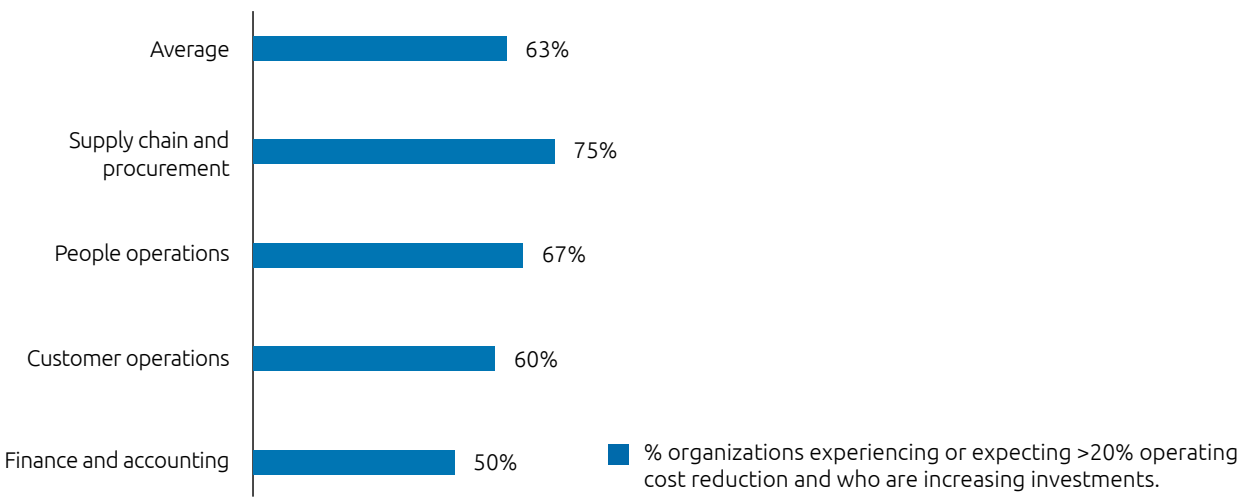


Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 1,607 executives.

Figure 6.
Among organizations that have achieved significant cost savings in their business operations, 63% have increased Gen AI investments

Question1: What percentage of total operations cost was reduced due to the following use cases: pilot, partially implemented, fully implemented?

Question 2: How has your investment level in Gen AI changed this year compared to last year?



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 545 executives who are from business functions and have experienced 20% or more cost reduction.

75%

organizations that increased their Gen AI investments in supply chain and procurement after achieving significant cost savings

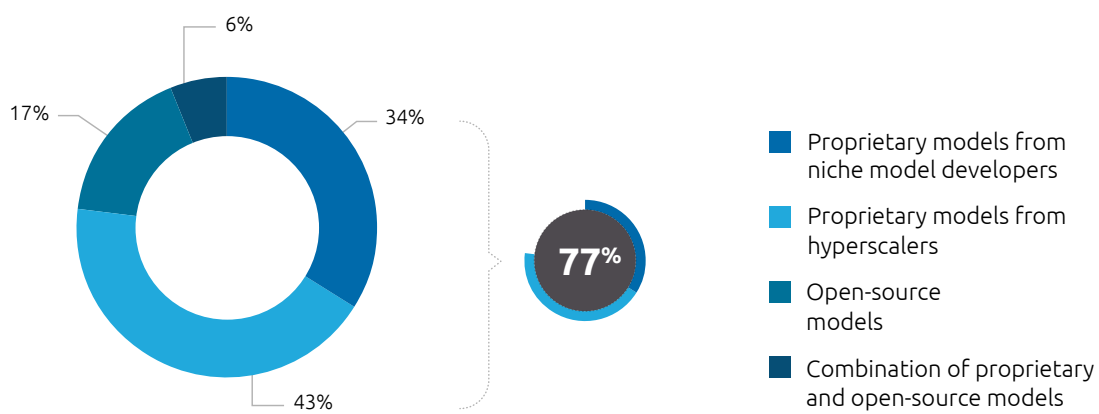
Among organizations that have realized/expect more than 20% operating cost reduction in their business functions, **most** increased their Gen AI investments from 2024.

Most investments will be in proprietary models

Despite the increasing performance and cost advantages of open-source AI models, a significant majority of executives continue to favor proprietary solutions for AI implementation. According to our survey data, **three out of four** executives prefer proprietary models, with **43%** opting for those developed by hyperscalers and **another third** choosing models from specialized niche providers. This preference is particularly strong among organizations that have scaled up their investments in AI and generative AI, indicating a clear trend toward trusted, enterprise-grade solutions that offer robust support, security, and integration capabilities.

Figure 7.
Three in four executives surveyed prefer proprietary models for AI implementation

Percentage of executives who prefer various AI models



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 1,607 executives.

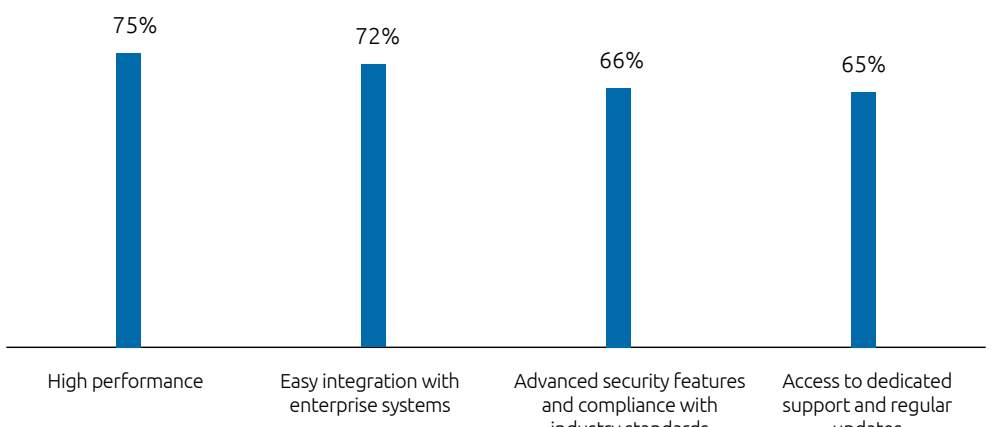
Looking ahead, the adoption of industry-specific AI is expected to accelerate. By 2027, more than 50% of Gen AI models deployed by organizations will be tailored to specific industries or business functions—up from just 1% in 2023. This shift underscores the growing demand for domain-specific intelligence and performance, areas where proprietary models are often better positioned to deliver value.[8]

Notably, organizations that have increased investment in AI and Gen AI show a stronger preference for proprietary models.

Over the past year, AI systems have continued to improve, exceeding human performance on several benchmarks.[9] According to Stanford's AI Index Report 2024, the skills gap between the top and 10th-ranked AI models on the Chatbot Arena Leaderboard was 11.9%. By early 2025, this gap had narrowed to 5.4%. Similarly, the difference between the top two models shrank from 4.9% in 2023 to just 0.7% in 2024.[10]

Figure 8.
Top factors driving preference for proprietary models

Question: What factors make you select proprietary models (e.g., Microsoft Copilot, OpenAI GPT-4, Google Gemini, Anthropic Claude, etc.)?



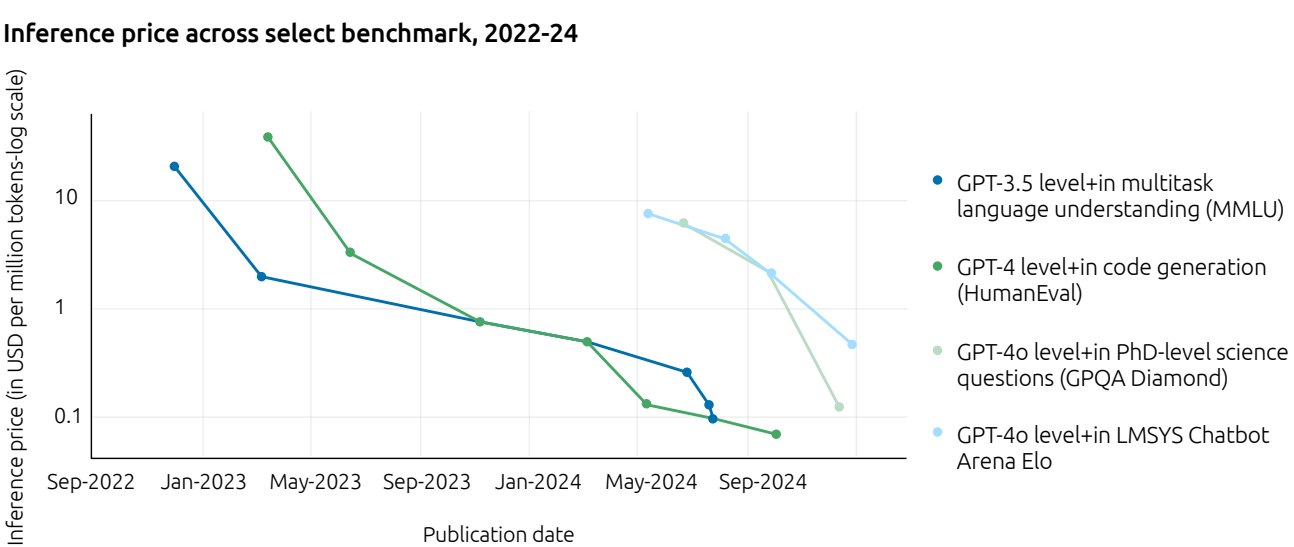
Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 1339 executives who prefer proprietary models or a combination of proprietary and open-source models for AI implementation.

Two additional factors affecting decisions on model selection – beyond capabilities and output reliability – are decreasing inference costs and the availability of model optimization techniques.

Inference costs, or the expense of querying a trained model, are falling dramatically (see Figure 9). This chart, on a logarithmic scale, illustrates the trend in AI performance per dollar. GPT 3.5 experienced a decrease from $20 per million tokens to $0.07 per million tokens, while GPT-4 had a reduction from $15 to $0.12 in a year.[11]

Model optimization techniques such as model pruning, quantization, and distillation help reduce the size and complexity of AI models without significantly compromising performance. These optimized models require fewer computational resources, thereby lowering inference costs. In addition, **efficient hardware utilization, batch processing** of inference requests, **dynamic scaling** to adjust the number of computing resources based on current demand, and **energy-efficient algorithms** can significantly reduce the power consumption of AI models.

Figure 9.
AI inference costs have rapidly declined



Source: Epoch AI, "Artificial Analysis, 2025".

"The adoption of AI use cases, accelerated by advancements in open-source technologies, availability of cloud AI services and infrastructure, and increased accessibility in enterprise systems, empowers organizations to innovate rapidly and achieve measurable business outcomes. Adoption is no longer optional or size-dependent – it's fundamental to competitive advantage and operational productivity."

Marek Sowa
Head of Generative Technologies Center of Excellence,
Capgemini's Business Services

By achieving an 11x reduction in compute costs without compromising performance, open-source models such as DeepSeek address a significant bottleneck in AI development: access to advanced hardware resources. More businesses, research institutions, and smaller startups can now deploy high-quality AI models tailored to their needs.[12] However, enterprise adoption of open-source models still involves certain trade-offs due to the varying levels of risks and implications for business and technology (see Figure 10). These include the need for greater technical expertise, potential exposure to security vulnerabilities, and reliance on community-driven support, which may affect update cycles and documentation quality. While these challenges are not universal and are being actively addressed by the open-source community, they remain important considerations for organizations evaluating AI deployment strategies.

Despite these advancements, fewer than one in five executives currently prefer open-source platforms. Concerns around security, technical complexity, and the need for ongoing customization and maintenance continue to drive organizations toward proprietary models. As performance converges and costs decline, proprietary solutions remain the strategic choice for enterprises seeking scalable, secure, and specialized AI capabilities.

11x

claimed reduction in AI compute costs for open-source models such as DeepSeek, without compromising performance

As Figure 10 shows, the choice between open-source and proprietary AI models is increasingly shaped by a spectrum of model openness, each with varying degrees of transparency, control, and risk. While fully open models offer unmatched flexibility and auditability, they also introduce concerns around data leakage and competitive exposure. On the other hand, more restricted models—ranging from partially open to fully closed—offer greater security, vendor support, and ease of deployment, albeit with limited customization. This nuanced landscape helps explain why most enterprises continue to favor proprietary models. As AI capabilities advance and inference costs decline, organizations are prioritizing solutions that balance performance with operational reliability, governance, and scalability—factors that proprietary models are well-positioned to deliver.

Figure 10.
The level of Gen AI model or reasoning model openness dictates their potential and inherent risks

Openness of Gen AI models or reasoning models used by AI agents	Disclosure level	Business implications	Key risks	Customization potential	Use cases	Examples
Fully open	Data ✓ Code ✓ Weights ✓	▪ Enables third-party audits and collaboration ▪ Low vendor lock-in risk ▪ High R&D flexibility	▪ Legal exposure from training data ▪ Competitors can replicate advantages	Full control over training/fine-tuning	Research, public-sector projects, ethical AI	OSI-certified models, Gemma 2 (partial)
Open code + weights	Data ✗ Code ✓ Weights ✓	▪ Cost-effective customization ▪ Team can modify architecture ▪ Moderate transparency	▪ Unclear data biases ▪ Compliance gaps in hidden training material	Architecture tweaks + fine-tuning	Internal tool development, niche applications	Llama 3.1, Mistral-Nemo
Open weights only	Data ✗ Code ✗ Weights ✓	▪ Low deployment costs ▪ Quick prototyping ▪ Limited vendor dependency	▪ Black-box functionality ▪ Security vulnerabilities in opaque code	Surface-level adjustments via API/plugins	MVP development, non-critical workflows	DeepSeek V2
Fully closed	Data ✗ Code ✗ Weights ✗	▪ Predictable compliance ▪ Vendor handles updates/security ▪ Benchmark leadership	▪ Complete vendor lock-in ▪ Ethical audits impossible ▪ Hidden costs	None (API access only)	Enterprise-scale standardized tasks	GPT-4o, Gemini 1.5 Pro

Source: Capgemini Research Institute analysis.

17%

VS.

77%

executives who prefer to use open-source AI models in business operations vis-a-vis proprietary/closed AI models

Around **46%** of executives have begun adopting open-source AI models from non-US/EU providers (such as DeepSeek's AI models (from China), Falcon LLM (from UAE), etc.), but their **usage 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 such as smartphones, tablets, and laptops.** This strategic approach allows organizations to tap into the cost-effectiveness and flexibility of open-source solutions while minimizing risks associated with implementation(such as data privacy concerns, limited support and documentation, and geopolitical or regulatory exposure). In niche industries especially, open-source solutions offer the possibility of customization that proprietary providers often can't match, making them a more adaptable and cost-effective choice.

Anna Kopp, Digital Lead Germany at Microsoft, says:
"Proprietary models are expected to dominate business settings, particularly those with specific data and industry requirements, as in sectors such as manufacturing and utilities."

The rapid evolution of function-calling models is transforming the economics of AI agents, making advanced reasoning capabilities more accessible and cost-effective than ever before.

Function/tool calling models (models that can trigger external tools or functions—like APIs or code—to complete tasks) are significantly **lowering costs of AI agents**, particularly those with advanced reasoning capabilities. Open-source local LLMs such as NexusRaven-V2 offer superior performance in function calling tasks at a lower cost than many popular proprietary models.[13] Fine-tuning smaller models for function calling further reduces compute resource requirements.[14]

Reasoning models such as OpenAI's o1 and o3, and Google's Gemini 2.5 Pro, contribute to cost efficiency by optimizing complex problem-solving tasks.[15] These advancements collectively drive down the cost of implementing AI agents with enhanced reasoning capabilities. Based on Figure 9, in 2023, there was a 100x reduction in inference costs, and by 2025, models like Gemini 2.5 and GPT-4.1-nano achieved another significant reduction. Hypothetically, by 2027, we could see another 50–100x reduction in costs.

100x

approximate reduction in the cost of each query to leading LLMs over the last 1-2 years

02 Gen AI and agentic AI adoption is soaring

36% of organizations have deployed Gen AI in 2025, up from 20% in 2024

Investment-driven adoption of Gen AI and agentic AI is accelerating across sectors. The proportion of respondents harboring doubts about AI's potential has dropped from 14% in 2024 to 11% in 2025. The share of organizations focusing on "exploring the potential of Gen AI/strategy development" has risen sharply, from 22% to 39%, highlighting a new emphasis on strategic planning.

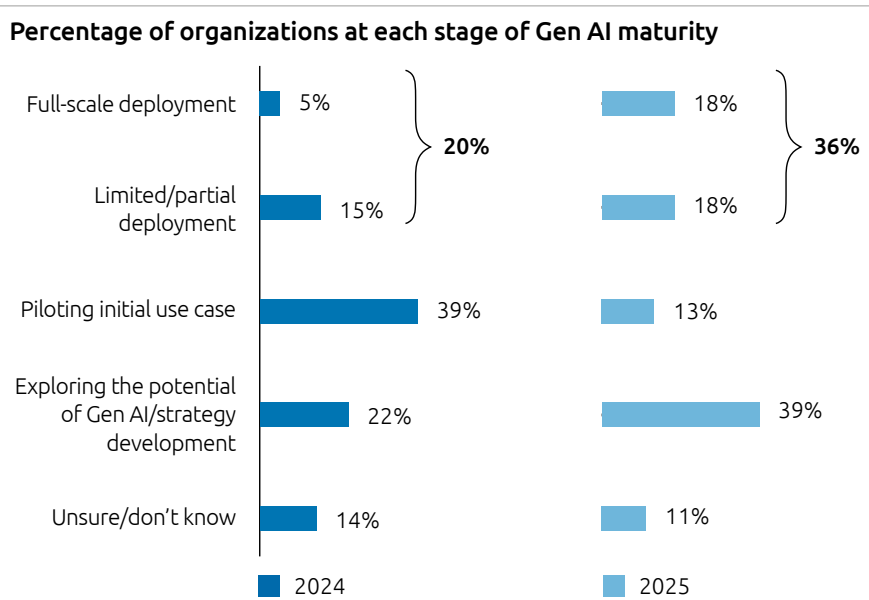
Meanwhile, those piloting initial use cases declined significantly, from 39% to 13%, suggesting that organizations are moving beyond the experimentation stage. Limited deployment grew slightly, from 15% to 18%, while full-scale deployment surged from 5% to 18%, signaling a strong commitment to operational integration. However, several organizations have regressed from piloting back to "exploring," suggesting a lack of deployment and operational focus.

Our **Gen AI in organizations 2024 report** covered all business functions, whereas the 2025 research offers targeted analysis of just four functions. Despite this narrower scope, the data underscores progression on strategic and operational implementation of Gen AI.

1.8x

year-on-year increase in Gen AI maturity, in 2025

Figure 11.
Gen AI maturity increased by 1.8x, year-on-year, in 2025



Source: Capgemini Research Institute, Generative AI executive survey, May–June 2024, N = 940 organizations that are at least exploring generative AI capabilities; AI-powered business operations survey, February – March 2025, N = 1,607 executives who are at least exploring the potential of Gen AI.
Note: Our Gen AI in organizations 2024 Report covered all business functions, whereas the 2025 research offers targeted analysis of just four functions.

Gen AI adoption has laid the groundwork for agentic AI implementation. Among organizations that have achieved limited or full-scale maturity in Gen AI, **around 30%** have already integrated AI agents into their operations.

In **2025, 21%** of organizations are already utilizing AI agents, including multi-agent systems, almost **double the number in 2024 (10%).** Furthermore, around **16%** of organizations plan to adopt AI agents within the next year, and a further **31%** within two to three years. These adoption figures appear higher than what we've seen in the field. The gap may stem from confusion between Gen AI assistants and AI agents, as definitions vary. While surveys show strong momentum, our client and partner conversations suggest actual adoption – especially of AI agents – could be more limited. It is also worth noting that the 2024 data came from the entire enterprise whereas the data from our current survey (2025) belongs to the four functions in scope of this study. The survey question measured "use of AI agents" as a generic term which can potentially mean any type of use from a pilot/proof-of-concept to a production environment.

Gelato is a global print-on-demand platform of local print providers. Previously, printers joining its network had to map up to 200,000 stock keeping units (SKUs) manually, a process that could take nine to 24 months, resulting in lost revenue.

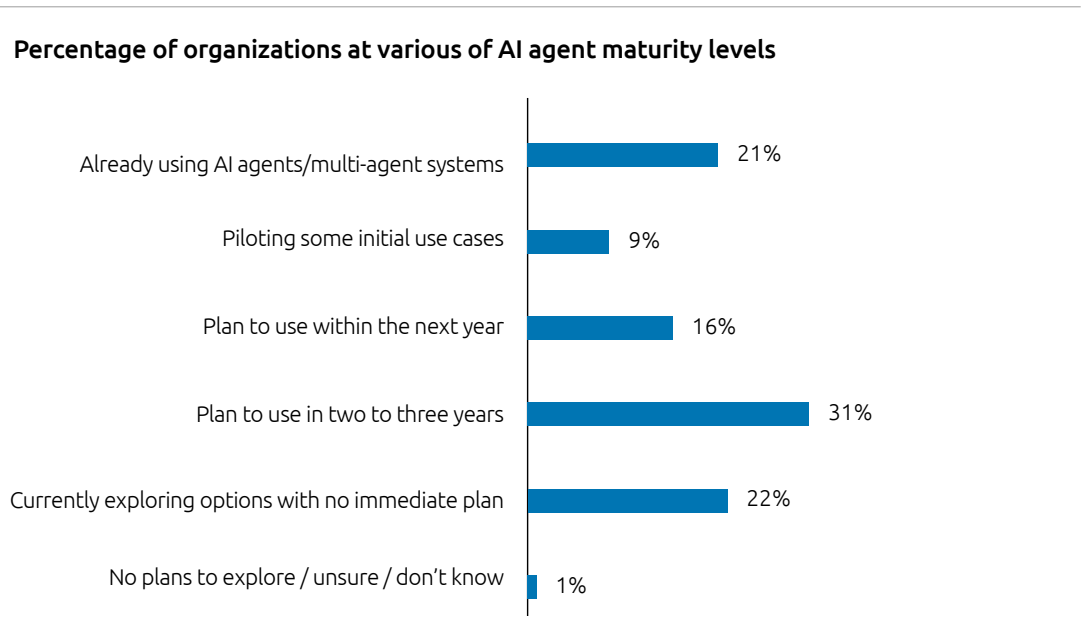
Integrating new logistics carriers required several days of engineering effort, slowing global expansion. Gelato embedded thousands of CrewAI agents within its platform, GelatoConnect, to automate bulk product catalog mapping and file validation. This reduced carrier-integration onboarding time from five days to just 10 minutes.[16]

Moody's is increasingly using autonomous AI agents in its financial research, replacing some outsourced tasks like SEC filing reviews and industry comparisons. The company has built 35 agents, including supervisory ones, forming a "multi-agent system" that mimics team dynamics. These agents are programmed with distinct roles, personalities, and access to data, allowing them to reach different conclusions—especially on complex issues like companies facing hidden geopolitical risks.[17]

20%

of organizations surveyed have already implemented AI agents and multi-agent systems in business operations

Figure 12.
One in five organizations already utilize AI agents or multi-agent systems



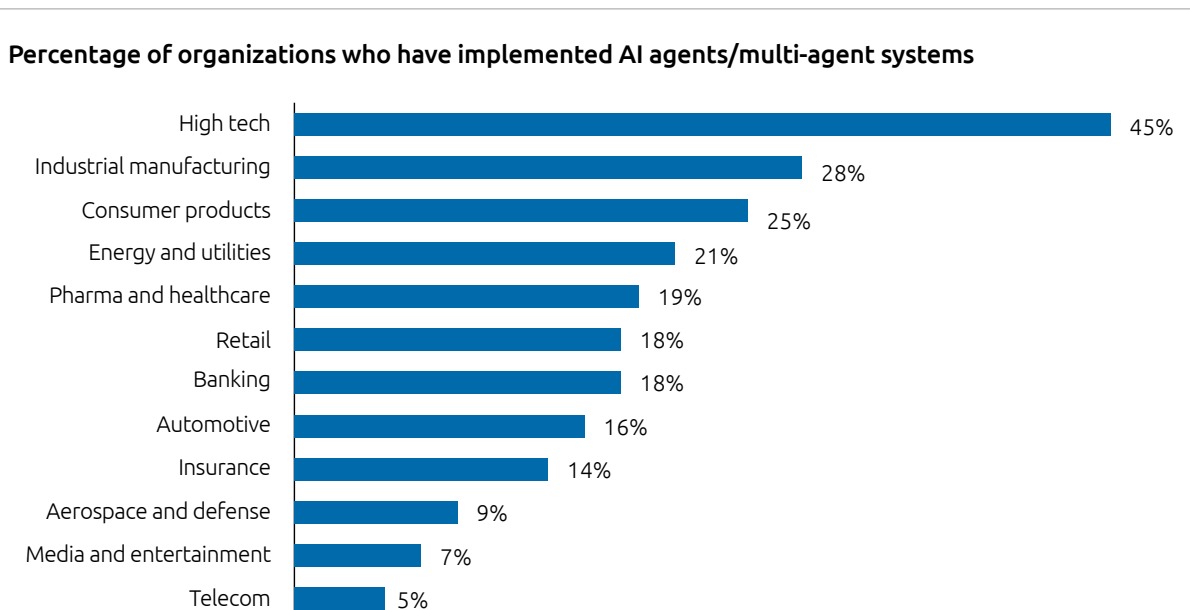
Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 1,503 executives (executives who selected Physical/digital robots were removed).

"Agentic AI represents a new frontier in intelligent automation, where AI agents not only orchestrate and integrate diverse tools but also drive dynamic workflows. This approach unlocks the potential for businesses to elevate automation to new heights, enhancing operational efficiency and optimizing existing investments in RPA and other technologies."

Deepak Anand
Enterprise Architecture Leader,
UiPath

The five sectors most advanced in adopting AI agents are high tech, industrial manufacturing, energy and utilities, and pharma healthcare, and retail. High tech leads, with 45% adoption, driven by the need for innovation and data-driven decision-making.

Figure 13.
The high-tech sector leads in AI agent/multi-agent system adoption



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 1,527 executives who are at least exploring the potential of Gen AI. We have not included Government/Public Sector as part of this analysis as data from the sector seemed to be highly optimistic.

Agentic AI projects are expected to rise by 48% in 2025

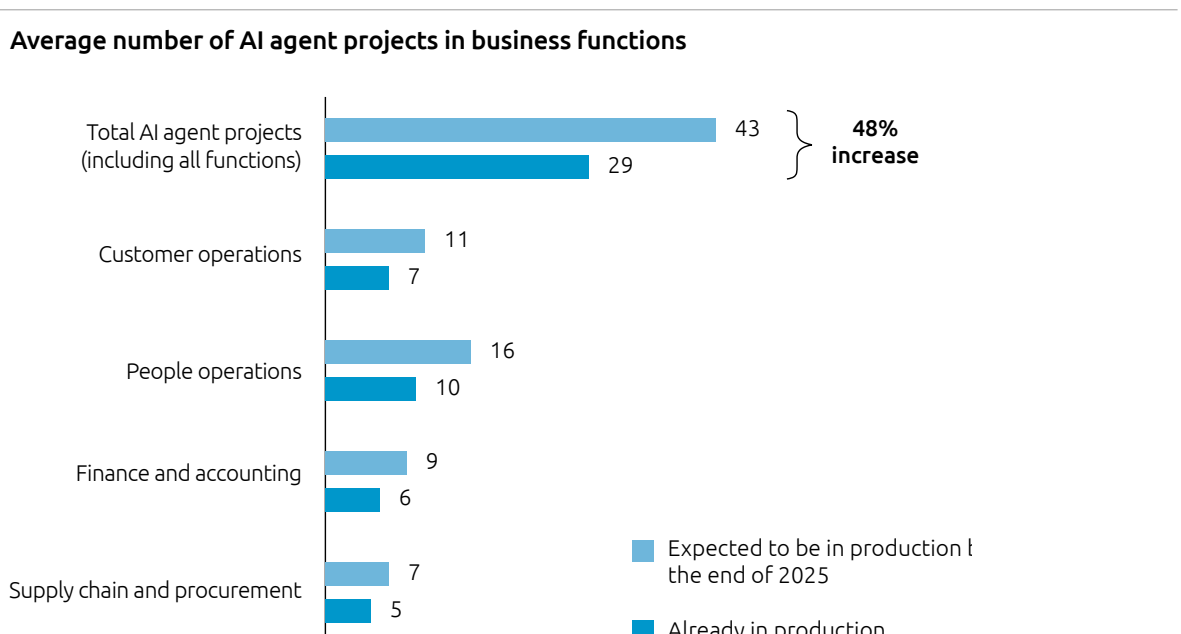
Across all four functions, there are currently 29 AI agent projects in production. This number is expected to grow to 43 by the end of 2025, marking a 48% increase.

OpenAI's research assistant, introduced in early 2025, is a cutting-edge AI model that synthesizes complex information with unprecedented speed. Already deployed in finance, science, and engineering sectors, such tools are enabling professionals to make faster and more informed decisions.[18]

48%

increase in agentic AI projects in business operations expected by 2025

Figure 14.
Total AI agent projects (including all functions) in production to increase by almost 50% by end of 2025



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 452 executives who have started piloting initial use cases, are already using AI agents, and have implemented multi-agent systems.

Key focus areas are emerging for the deployment of AI agents. In **supply chain and procurement**, predictive AI models optimize inventory management and enhance resilience. Within **customer operations**, AI-powered tools resolve queries more efficiently, improving customer satisfaction. By 2029, agentic AI will autonomously resolve 80% of common customer service issues without human intervention, leading to a 30% reduction in operational costs, according to recent research.[19]

In **finance and accounting**, AI agents automate tasks such as budgeting, forecasting, and risk assessment. In **people operations**, AI streamlines candidate sourcing and evaluation, and provides real-time performance feedback and predictive insights to improve employee outcomes.

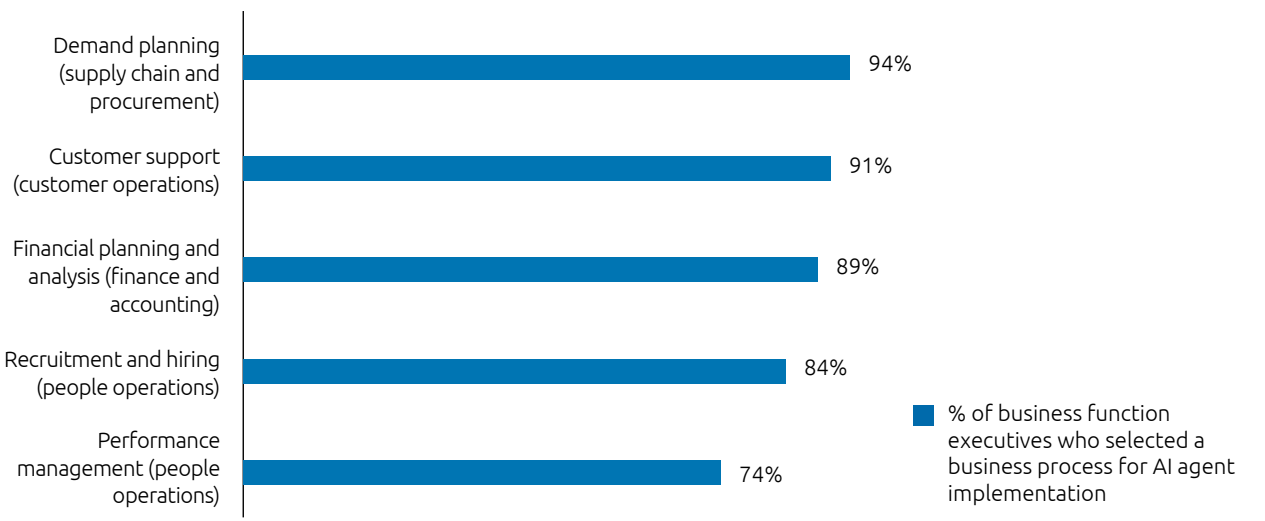
The CAIO at a federal governmental department says: *"AI agents significantly reduce the time spent on repetitive tasks. For example, ambient technology can cut the time physicians spend on documenting visits by 50–80%."*

80%

of common customer service issues will be resolved by agentic AI without human intervention by 2029

Figure 15.
Key areas where executives have deployed or plan to deploy AI agents

Question:
In your business function, for which of the following processes have you deployed or plan to deploy AI agents ?



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 1,007 executives who are from business functions such as supply chain and procurement, finance and accounting, people operations, and customer operations.

03 AI-driven process transformations are delivering value across business operations

Scaling AI-enabled process transformations across key business operations has led to substantial savings across multiple cost categories within targeted business functions.

Mapping AI, Gen AI, and agentic AI integrations by overall cost impact and scale of adoption reveals a compelling pattern. While some high-impact process transformations remain underutilized, others with lower impact have seen broader uptake. This disparity underscores the nuanced challenges of embedding AI into enterprise workflows and highlights the importance of context-aware, strategic decision-making.

The success and scalability of AI-driven process enhancements depend on factors such as organizational readiness, infrastructure maturity, and alignment with business priorities. In some high-impact scenarios, adoption is constrained by barriers like high upfront investment, implementation complexity, limited process standardization, or a shortage of specialized talent. Conversely, lower-impact transformations often gain momentum due to their ease of deployment, lower cost, and quicker return on investment—making them attractive entry points for organizations beginning their AI journey.

To effectively leverage AI, companies must first ensure they have accurate, relevant, and well-managed data—something many struggle with due to poor data collection or management practices. Leading organizations address this by redesigning their data infrastructure and operational processes. For example, Panasonic Energy North America reimagined its maintenance workflows using Palantir's AI platform, training a virtual assistant on over 1 million maintenance tickets to support 350 technicians in producing 5.5 million batteries daily. By integrating data from manuals, telemetry, and expert input, the assistant reduced downtime, increased throughput, and accelerated technician onboarding—demonstrating how rethinking core processes can unlock the full potential of AI.[20]

It's important to note that this dynamic does not apply to all AI use cases. Rather, it reflects the influence of organizational constraints or priorities on adoption patterns. To maximize the value of AI, organizations must assess their **capabilities, resources, and strategic goals**, prioritizing initiatives that align with these.

There is also a varying cost savings impact of AI and Gen AI use cases across business functions. Functions such as finance and accounting (30% cost savings) and people operations (31% cost savings) often involve repetitive, rules-based tasks such as invoice processing, payroll, and compliance reporting. Automation of these kinds of tasks leads to immediate cost savings.

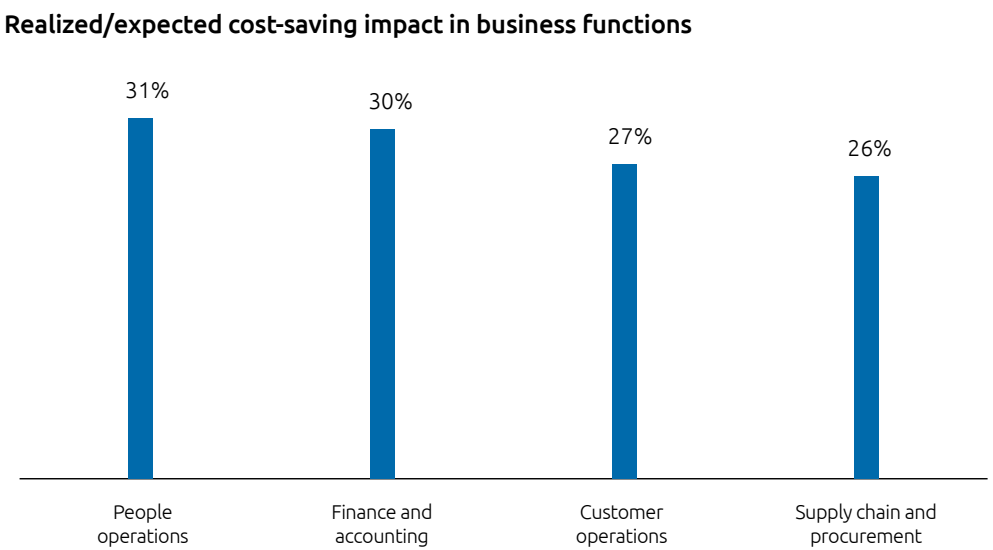
In contrast, customer operations (27% cost savings) may benefit from the sensitivity and emotional intelligence only human interaction offers. Organizations must weigh this against less quantifiable gains in customer satisfaction and loyalty offered by AI.

Another crucial factor is quality and availability of data. Functions like finance typically have structured, historical data that enhances the effectiveness of AI solutions. Conversely, supply chain and procurement (26% cost savings) often deals with siloed, unstructured data or data dependent on external partners.

26-31%

operational cost savings in business functions as a result of AI implementation

Figure 16.
AI and Gen AI use cases' impact on various business functions



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 716 executives who are from business functions, who have at least piloted one use case.

Supply chain and procurement

In supply chain and procurement, the comprehensive integration of AI-driven route optimization and warehouse layout design into operational workflows has demonstrated the potential to reduce transportation and logistics costs by 25%, operational costs by 23%, and inventory management costs by 20%—resulting in an average 23% cost reduction in fulfillment process.

Organizations using AI for demand forecasting and stock optimization have seen an improvement of up to 85% in forecast accuracy, minimizing surplus inventory and reducing carrying costs by up to 15%.[21]

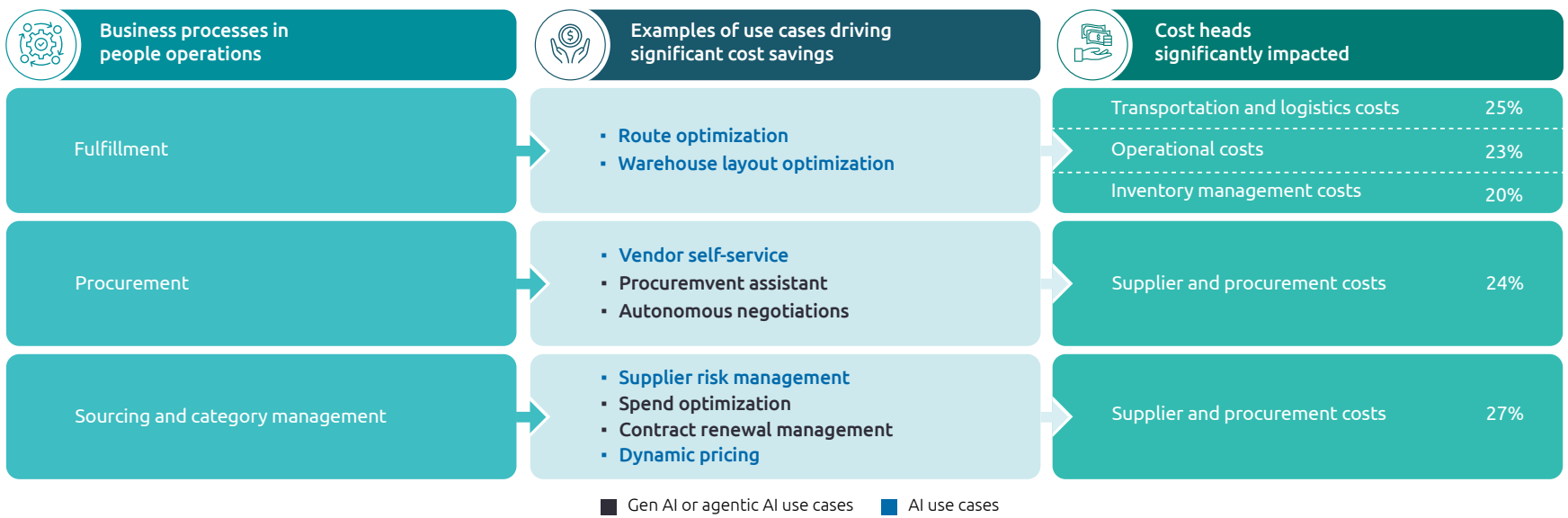
23%

average cost reduction through AI-driven route optimization and warehouse layout design integration in fulfillment operations

"Gen AI and agentic AI won't fix broken supply chains — but applied to the right processes, they'll transform them. Focus, not hype, drives real enterprise value."

Dr. Mark Roberts
CTIO Applied Sciences,
Capgemini Engineering, and Deputy Head,
Capgemini's AI Futures Lab

Figure 17.
Impact of AI and Gen AI/agentic AI –enabled process transformations on supply chain and procurement



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 266 executives from supply chain and procurement

Note: Estimated cost savings may overlap with other fully implemented use cases. These figures are relative benchmarks, not absolute values, and depend on factors such as implementation and organizational context.

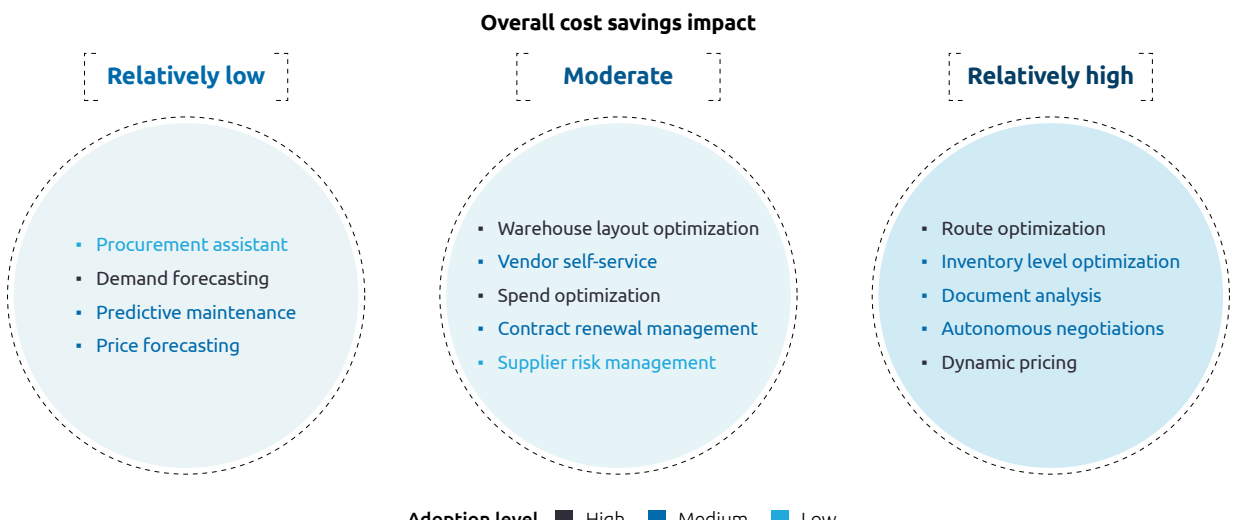
By utilizing AI-driven demand forecasting, **General Electric** (GE) has reduced inventory costs by 20%. The integration of AI in both predictive maintenance and supply chain management has streamlined operations and minimized disruption.[22]

Within supply chain and procurement operations, AI-enabled route optimization has emerged as a high-impact, widely adopted process enhancement. In contrast, capabilities like document analysis and autonomous negotiations—while offering significant potential—are still in the early to moderate stages of adoption. Interestingly, demand forecasting has high adoption but is relatively low-impact.

25%

reduction in overall cost related to record-to-analyze process due to Gen AI/agentic AI –driven automation

Figure 18.
Route optimization stands out with high impact and adoption



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 266 executives from supply chain and procurement.

Note: Estimated cost savings may overlap with other fully implemented use cases. These figures are relative benchmarks, not absolute values, and depend on factors such as implementation and organizational context.

Finance and accounting operations

Gen AI/agentic AI –driven automation in audit compliance and financial reporting is cutting the overall cost related to record-to-analyze process by up to 25%, with major savings in compliance and decision-making activities.

The deployment of an AI-driven predictive compliance monitoring system significantly enhanced SafeGuard Financial's operations. Within the first year, compliance incidents were reduced by over 50%, and regulatory breach detection improved by 75%. This proactive approach saved millions in potential fines and bolstered the company's reputation as a trustworthy financial institution. SafeGuard Financial transformed its compliance framework into a dynamic, efficient, and forward-looking operation, setting a new benchmark in regulatory adherence for the financial sector.[23]

In finance and accounting, smart expense tracking offers substantial savings but has relatively low adoption rates. Increased awareness and investment in AI for expense management could unlock significant operational efficiencies. Gen AI tools for financial insight generation remain underutilized, despite their potential.

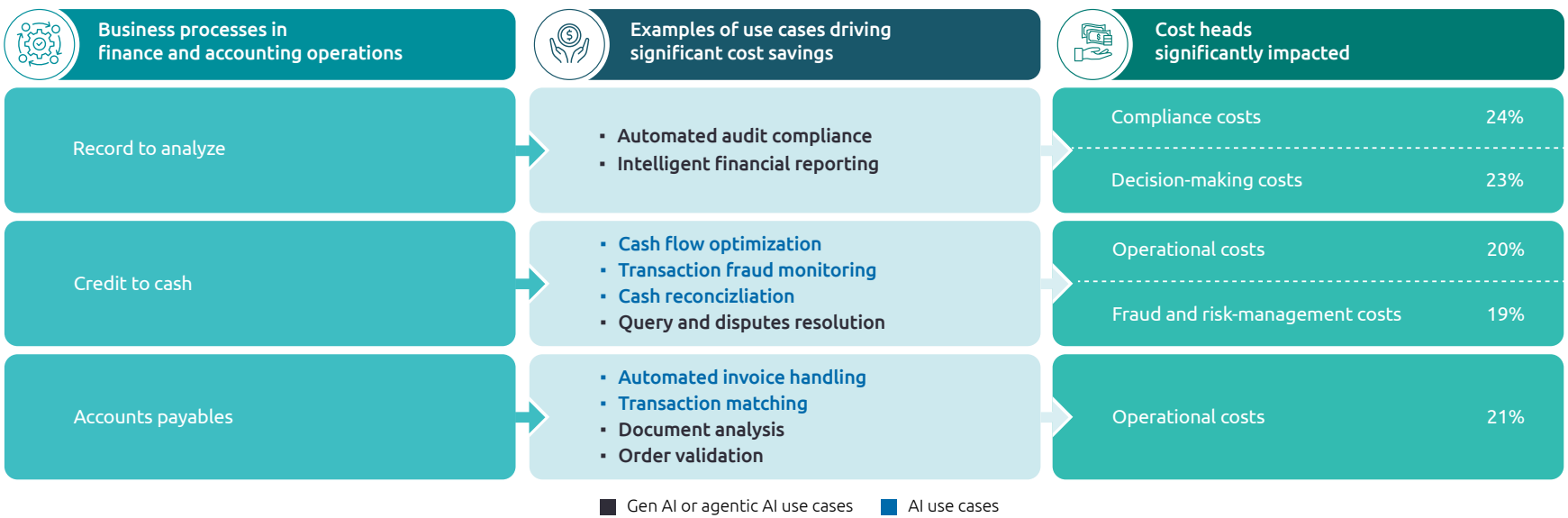
A recent study conducted by a finance automation firm found that Gen AI processed five times faster than manual methods, freeing up 70% of accounts payable staff time for strategic activities such as vendor optimization and revenue stream identification.[24]

A senior director for global procurement analytics, data science and digital at a pharmaceutical company says: *"With AI-powered contract analytics, payment accuracy, rebate calculations, and compliance are optimized, enabling organizations to recover lost value that might have otherwise gone unnoticed."*

75%

improvement in regulatory breach detection using AI at SafeGuard Financial - a UK-based financial advisory firm

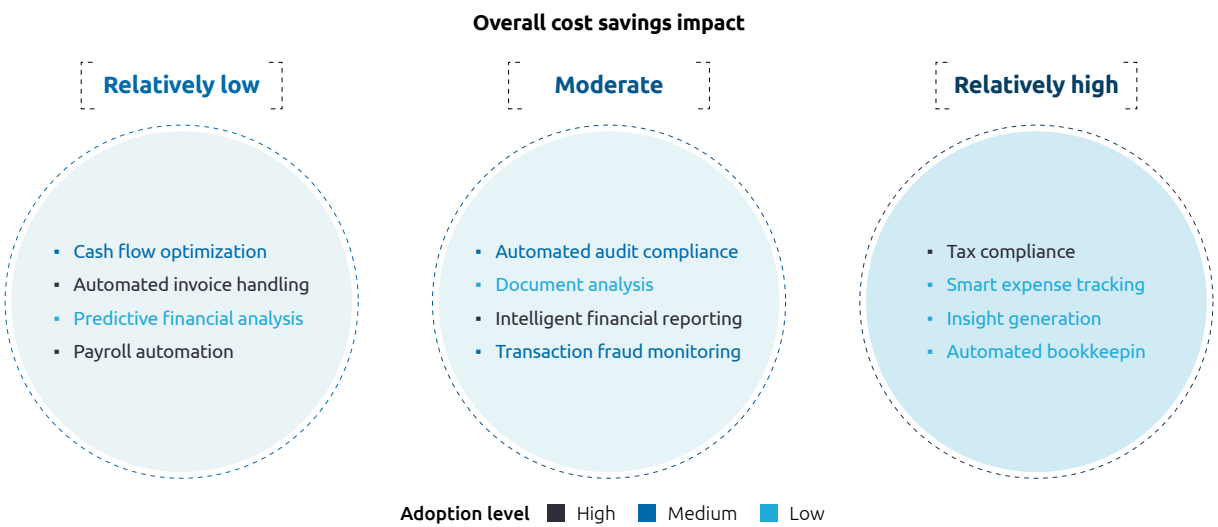
Figure 19.
Impact of AI and Gen AI/agentic AI –enabled process transformations on finance and accounting operations



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 250 executives from finance and accounting.

Note: Estimated cost savings may overlap with other fully implemented use cases. These figures are relative benchmarks, not absolute values, and depend on factors such as implementation and organizational context.

Figure 20.
Tax compliance has achieved relatively higher savings and adoption



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 250 executives from finance and accounting operations.

Note: Estimated cost savings may overlap with other fully implemented use cases. These figures are relative benchmarks, not absolute values, and depend on factors such as implementation and organizational context.

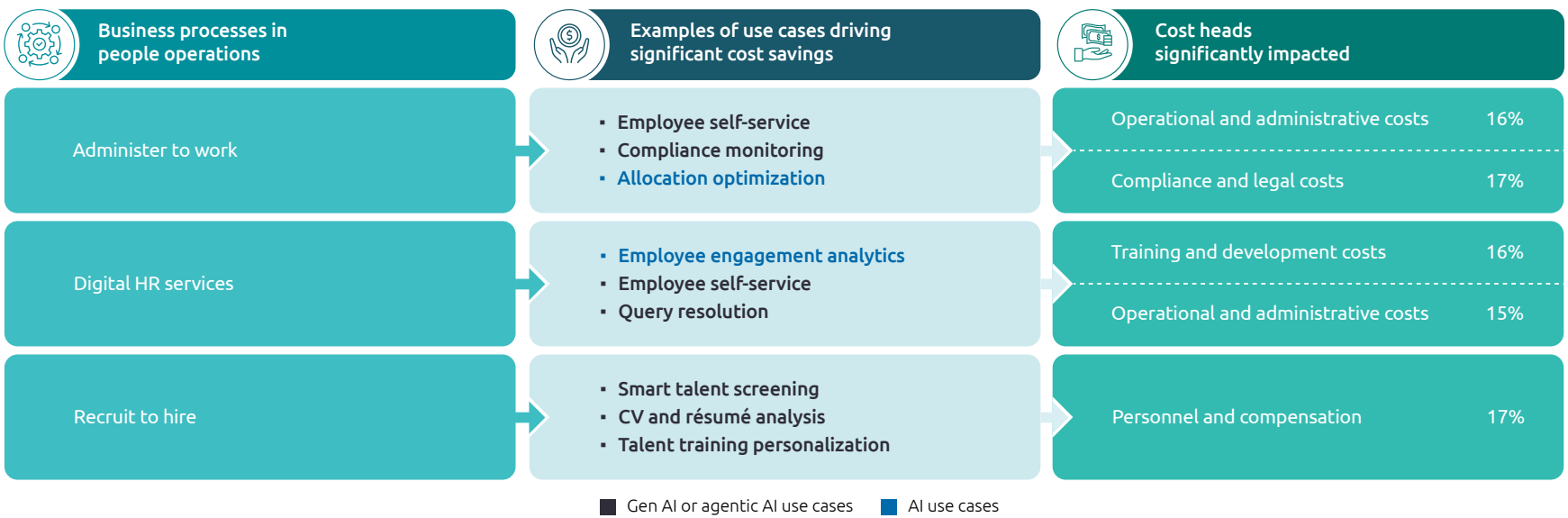
24%

reduction in compliance costs through use of Gen AI and agentic AI in people operations processes

People operations

In people operations, the integration of Gen AI/agentic AI into workflows such as smart talent screening and résumé analysis is enabling over 15% reduction in personnel and compensation costs, significantly optimizing the recruit to hire process. By automating labor-intensive tasks like candidate evaluation and role matching, organizations can streamline hiring processes, enhance operational efficiency, and significantly lower associated expenses.

Figure 21.
Impact of AI and Gen AI/agentic AI –enabled process transformations on people operations



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 240 executives from people operations.

Note: Estimated cost savings may overlap with other fully implemented use cases. These figures are relative benchmarks, not absolute values, and depend on factors such as implementation and organizational context.

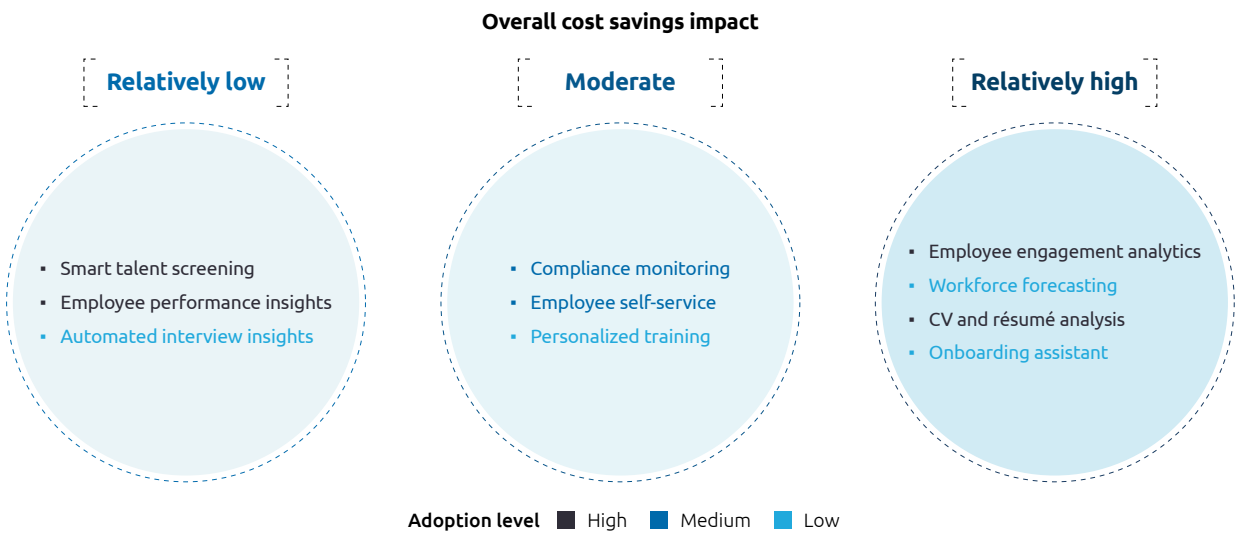
Electrolux uses Gen AI to enhance and digitalize its HR and talent acquisition processes. This includes automating interview scheduling, leading to a 78% time saving in interview coordination; 51% decrease in incomplete applications; and an 84% increase in application conversion rate.[25]

RingCentral increased its candidate pipeline by 40% and improved pipeline quality by 22% using a Gen AI-powered talent search solution.[26]

15%

reduction in personnel and compensation costs as result of Gen AI/agentic AI integration into workflows

Figure 22.
Employee engagement analytics and CV and résumé analysis stand out with both relatively high impact and adoption rates



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 240 executives from people operations.

Note: Estimated cost savings may overlap with other fully implemented use cases. These figures are relative benchmarks, not absolute values, and depend on factors such as implementation and organizational context.

In a fast-moving retail environment, where staffing levels directly impact store performance and customer experience (CX), fast-fashion chain **H&M** needed a smarter, more scalable solution to remain competitive. Partnering with Maki, an AI-powered HR agent, H&M streamlined recruitment and improved the candidate experience. AI-driven assessments and automation helped H&M identify top talent, reducing time-to-hire by 43%. This ensured stores remained fully staffed, enhancing daily performance. Additionally, employee attrition dropped by 25%, as Maki's matching process led to a more stable and engaged workforce.[27]

43%

reduction in time-to-hire for H&M using AI-driven assessments and automation for identifying top talent

"Gen AI and agentic AI have unique capabilities, making them suitable for specific, non-overlapping tasks. For example, Gen AI is capable of addressing front-end tasks like customer communication and scheduling, and agentic AI is great at handling backend and complex activities such as billing and reconciliation. Systematically deploying the two in relevant areas can lead to synergies and streamlined workflows."

Sahil Chandratre
Head of Strategy, Analytics and Consumer Insights, Reliance Retail

Customer operations

Integrating Gen AI capabilities such as call summarization, chatbots, and automated responses—alongside AI-driven early problem detection and post-contact analytics—can reduce operational costs by up to 22% and labor costs by 20%. These AI-enabled enhancements streamline customer interaction workflows, improve service efficiency, and significantly lower support-related expenditures.

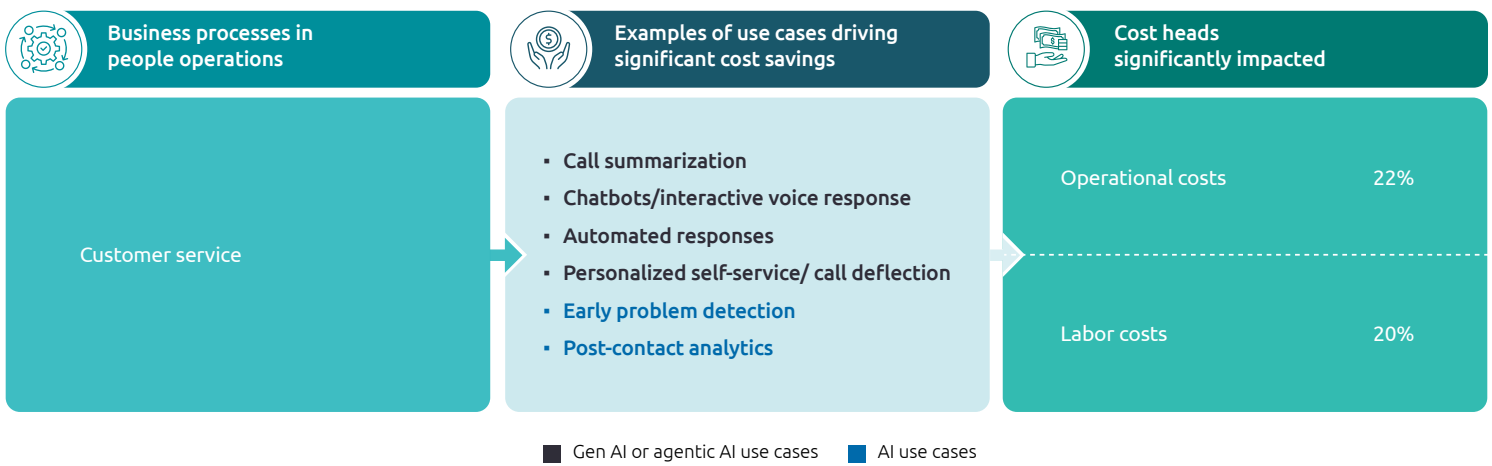
90%

of Telstra employees using One Sentence Summary report time savings and improved effectiveness

Telstra, Australia's leading telecom and tech company, developed two generative AI tools – Ask Telstra and One Sentence Summary – using Microsoft Azure OpenAI Service to support its frontline staff. Early results show strong impact: 90% of employees using One Sentence Summary report time savings and improved effectiveness, while 84% of agents say Ask Telstra enhances customer interactions. These tools are helping staff manage growing service complexity with greater speed and confidence.[28]

Automated responses, real-time assistance, and voice of customer (VoC) solutions excel in cost savings and adoption. Automated responses handle FAQs, returns, and basic inquiries, while instant communication fosters trust and loyalty. VoC systems analyze feedback in real time, helping businesses improve products, services, and customer engagement.

Figure 23.
Impact of AI and Gen AI/agentic AI –enabled process transformations on customer operations



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 251 executives from customer operations.

Note: Estimated cost savings may overlap with other fully implemented use cases. These figures are relative benchmarks, not absolute values, and depend on factors such as implementation and organizational context.

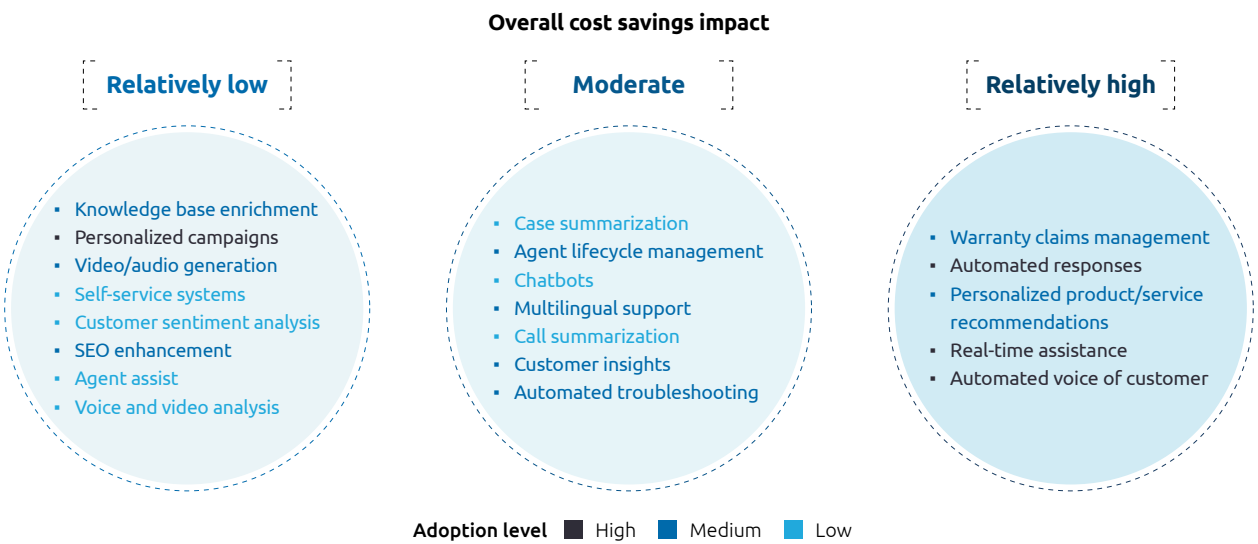
22%

reduction in operational costs through use of Gen AI and agentic AI in customer operations processes

"Gen AI and agentic AI slash service costs while boosting personalization — the key is to aim at the right customer processes. Precision and empathy beats scale when delighting customers at speed."

Robert Engels
CTIO, Head of AI Futures Lab,
Capgemini

Figure 24.
Automated responses, real-time assistance, and automated "voice of customer" lead in terms of both cost savings and adoption levels



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 251 executives from customer operations.

Note: Estimated cost savings may overlap with other fully implemented use cases. These figures are relative benchmarks, not absolute values, and depend on factors such as implementation and organizational context.

An AI firm used Lindy AI, a platform designed to create and utilize AI assistants, to automate its proposal-creation process. This reduced its average turnaround time from 1.5 weeks to just one to two days, a saving of 20–30 hours per week. This is equivalent to the work hours of a full-time employee, freeing up the team to focus on high-value tasks.[29]

21%

average reduction in customer service costs as a result of AI enables process automation in customer operations

Discussion with
Dr. Walter Sun
SVP, Global Head of AI, SAP

Q Can you elaborate on the AI strategy at SAP?

A "Our AI strategy focuses on embedding AI within products for more organic use to align AI capabilities with enterprise needs; designing AI-powered assistants that empower customers to maximize efficiency within SAP products; and establishing ethical guidelines and governance to ensure AI solutions are transparent, fair, and trustworthy."

Q Can you share some examples of AI functionalities that are part of SAP platforms and solutions?

A "Natively within business applications, such as using natural language in SuccessFactors to create detailed job descriptions. Joule, our Gen AI copilot, connects various business applications and facilitates tasks such as creating emails or coordinating a response to an invoice dispute. Through the SAP Business Technology Platform (BTP), customers can build custom AI scenarios using the Generative AI Hub, which provides access to more than 30 large language models [LLMs] from our partners."

Q How do you envision AI systems increasing autonomy and winning user trust?

A “Initially, humans will be in the loop for all decisions. Over time, as confidence in AI grows, thresholds for autonomous decisions can be increased. For example, approvals under $100 might be automated initially, while larger amounts still require human oversight. Over time, this limit could become $500, then $1,000. This gradual increase in autonomy can allow for the build-up of trust in AI systems.”

Q How are multi-agent systems used for businesses, and what potential benefits do they offer beyond cost savings?

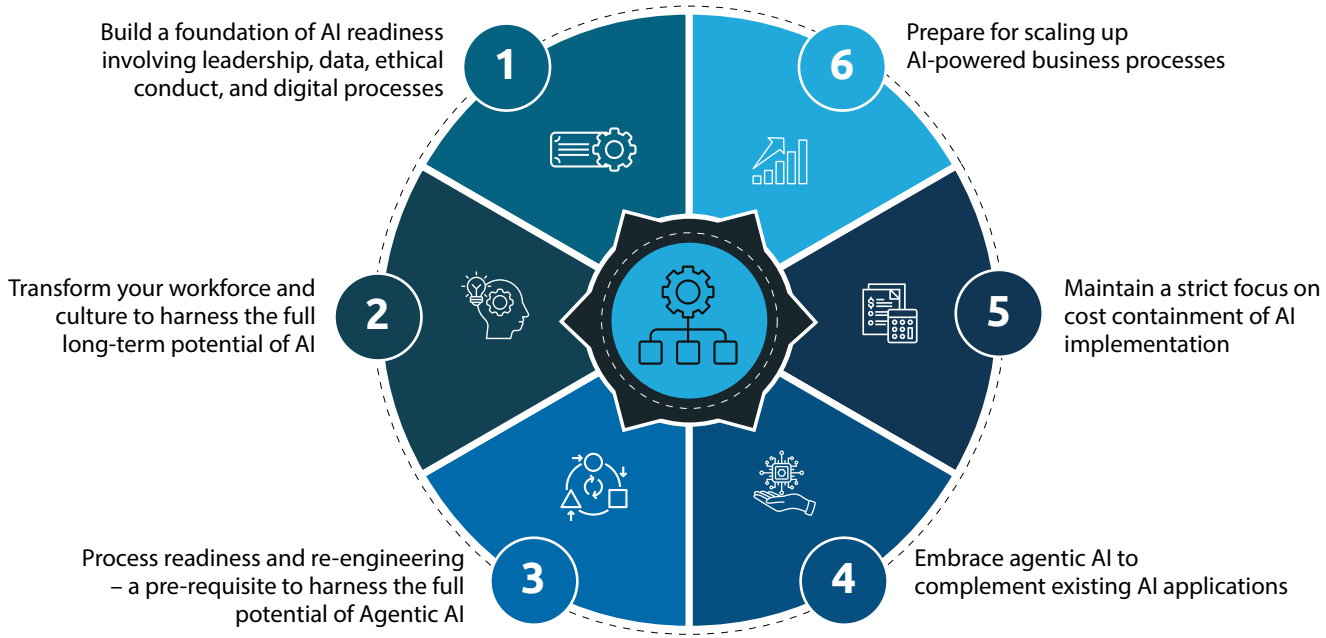
A "Multi-agent systems are already being implemented in areas like dispute management, where different agents collaborate to resolve issues efficiently. For example, a conversational agent might pass information to a delivery agent, who then interacts with a warehouse agent and an invoice agent, culminating in a CRM agent proposing a remedy. Although these systems are currently in early adoption stages, they are being onboarded by clients. The potential benefits of AI agents extend beyond cost savings to include productivity improvements, much the same way a junior assistant could make a business persona more productive, and new revenue sources.”

Q How does SAP address client concerns around data privacy?

A "Data privacy is a significant concern for clients. SAP addresses this by using enterprise-grade LLMs that ensure user inputs are not stored. This helps prevent confidential data leaks. Once companies understand how data are handled within SAP's ecosystem, they need to decide how much information they are willing to share. More shared information leads to better insights and experiences.”

04 Preparing your organization for AI-powered business operations

Figure 25.
Six essential steps for organizations to advance towards AI-driven business operations



Source: Capgemini Research Institute analysis.

1 Build a foundation of AI readiness

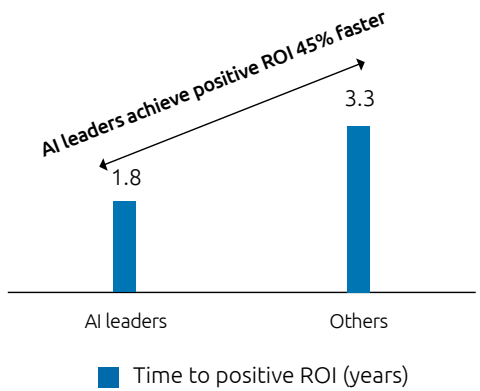
Our research reveals that foundations of strong leadership, governance, and AI readiness enable organizations to achieve ROI 45% faster. This should include:

- **Strong leadership advocacy** for AI
- **Highly digital business processes** and **digital twins** for most processes
- Governance backed by careful **ethical consideration**
- **Enterprise-wide AI literacy.**

Note: Digital twins for business processes are virtual representations of an organization's workflows, systems, and operations that mirror real-world processes.

Figure 26.
AI leaders take 45% less time to achieve ROI

Time to positive ROI (years) – AI leaders versus others



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 300 executives who are from business functions such as supply chain and procurement, finance and accounting, people operations and customer operations and who are tracking ROI as a financial KPI to evaluate the success of AI and Gen AI initiatives.

Each of these dimensions plays a crucial role in harnessing the potential of Gen AI and agentic AI. Our survey reveals that about **one in three** leaders is a strong advocate of Gen AI. Another **one-third** of leadership teams are hesitant to adopt Gen AI, and demand more evidence of its value. And about one in seven leaders is insufficiently aware of its potential.

45%

AI readiness enable organizations to achieve ROI 45% faster

To build truly digital operations and enable digital twins, organizations must first focus on strengthening their data foundations

Organizations should focus on several key areas to establish this:

- Ensure data availability and accessibility by integrating data from various sources into a centralized repository.
- Prioritize data quality by implementing robust data governance practices, including regular data cleaning and validation processes. **Around 73%** of organizations surveyed say that they promote accountability and transparency in data use.
- Maintain data security and privacy to protect sensitive information and comply with regulations.
- Foster a culture of data literacy across the organization, ensuring that employees understand the importance of data and are equipped to leverage it effectively.

73%

of organizations surveyed say that they promote accountability and transparency in data use

Establish strong governance, backed by ethical considerations and regulatory compliance

Regulatory (53%) and risk-related (45%) concerns are among the most significant barriers to large organizations' adoption of Gen AI and agentic AI. We have defined several best practices to set up robust governance mechanisms:

Set up governance bodies

This is the most highly prioritized aspect of AI adoption, with 67% of organizations in our survey having incorporated it into their AI strategies. A dedicated, high-level committee of leaders from IT, legal, data governance, ethics, compliance, and senior management is usually entrusted with formulating policies, oversight of implementation, managing risks, and continuous improvement.

Risk management and regulatory compliance

Worryingly, only about half of the organizations in our survey (55%) cite this as a key aspect of AI strategy. A similar share (57%) conduct regular audits of AI systems for privacy risk, bias, fairness, and regulatory compliance. For highly regulated industries such as banking, healthcare, and utilities, ensuring reliability and robustness of AI results is critical. The CDO at an energy organization says: *"AI agents pose considerable risks, especially when they interact with each other in critical infrastructure settings. Ensuring that their results are reliable and robust is a significant challenge."*

Create an ethical policy framework to address transparency, bias, and explainability

Around 60% of organizations carefully consider the ethical implications of Gen AI before adoption, evaluating potential issues such as privacy concerns, bias in AI models, and the impact on stakeholders. Additionally, organizations monitor AI and Gen AI regulations, proactively adapting compliance strategies to meet evolving legal and ethical standards.

67%

of organizations in our survey have set up AI governance bodies as part of their AI strategies.

Set up strong data and AI governance

Strong AI governance is also crucial to data management and quality control, as well as managing, observing, and aligning agents across an enterprise. Gen AI and agentic AI necessitate a focus on monitoring and evaluation of Gen AI models, data-processing approaches such as retrieval-augmented generation (RAG), data interoperability through protocols such as model context protocol (MCP), and strict data-quality controls, data security, and authentication/validation.

Balancing AI governance and autonomy

Balancing uniformity in best practice governance, ethics, security, and privacy, with the freedom for teams to build and deploy AI independently, is crucial to fostering innovation while maintaining standards and driving business growth.

Careful consideration of the ethical aspects and a strenuous effort to comply with regulatory requirements mitigates legal and reputational risk while building trust.

Digitized operations built on strong data foundations greatly enhance the success of AI initiatives, accelerating time to ROI. Enterprise-wide AI literacy reduces resistance to change and empowers employees to embrace AI.

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

2 Transform your workforce and culture to harness the full long-term potential of AI

According to **67%** of executives, **addressing workforce impact** is is among the top three barriers to securing investment for AI and Gen AI, and **lack of acceptance by the workforce** is the top barrier to adoption, according to **54%** of executives. Other research has emphasized fears related to job security, heightened surveillance, and reduced autonomy in the workplace.[30]

As AI becomes integral to business operations, AI skills must extend beyond data and tech teams. Businesses should rotate employees' skills, providing training to integrate AI into daily tasks, simultaneously building efficiency and skillsets. Technical AI skills remain crucial in specialist teams.

"While some organizations might embrace extensive automation, minimizing human involvement and relying primarily on a small team to oversee AI models, others may intentionally preserve a human workforce as a vital element of their core competency and brand identity, even as they adopt AI technologies."

Eric Pace
Head of AI,
Cox Communications

AI resource management: In some ways, it would help to consider AI agents as a **new workforce**. Recruiting becomes the process of evaluating capabilities. Whether it's an agent or a tool, organizations must assess performance, reliability, and alignment with business needs. Onboarding would involve defining real operational responsibility including access to and use of AI within the organization. By framing agent and tool management through this familiar HR lens, organizations should strive to create a safe, structured, and scalable model.

Further, when AI agents are placed in real business environments, operational management becomes essential. It's not just about individual agent performance –it's about how agents, tools, and humans work together, across teams and functions, toward shared outcomes. As AI agents and tools are reusable, shareable, and often support multiple teams at once, tight coordination and control are necessary. Organizations should aim to build an ecosystem of AI agents accessible across the workforce. A platform like this should also provide insight into available skills and capabilities of AI agents, allowing reuse, reducing redundancy, and promoting standardization.

Lastly, organizations will need to manage the agentic system carefully, ensuring it is ready to onboard new agents, retire outdated ones, change and upgrade databases, or rebuild tools.

" AI agents are the new workforce, requiring an even higher management rigor than for human employees. Effective integration of AI agents into the workforce demands an AI resource management structure."

Steve Jones
Data-driven Business and Gen AI leader,
Capgemini

Boost automation and workforce productivity

Around **63%** of organizations who have implemented Gen AI at partial or full scale say it has transformed their business processes. Over the past two years, 30% of tasks have already been automated. Looking ahead, another 40% of tasks are expected to be automated, which together means 70% of tasks could be handled by AI. This shift is expected to free up 40% of employees' time, allowing them to focus on more valuable work. When we combine the scale of automation for the next two years with the time savings, it translates to an estimated **16% increase in overall productivity** over the next two years.

With full implementation of agentic AI, CHROs anticipate a **30% boost in employee productivity** and a **19% cut in labor costs**—translating to approximately **$11,064 in savings per employee**, based on OECD average annual wages.[31]

Research indicates that employees who work with AI enjoy their jobs more, with 83% agreeing that AI enhances job satisfaction. Additionally, new employees increasingly expect AI support in their roles.

This trend highlights the positive impact of AI on employee engagement and the growing demand for AI-driven tools in the workplace.[32]

According to a Google study, 45% of organizations that report improved productivity from Gen AI have seen their productivity double.[33]

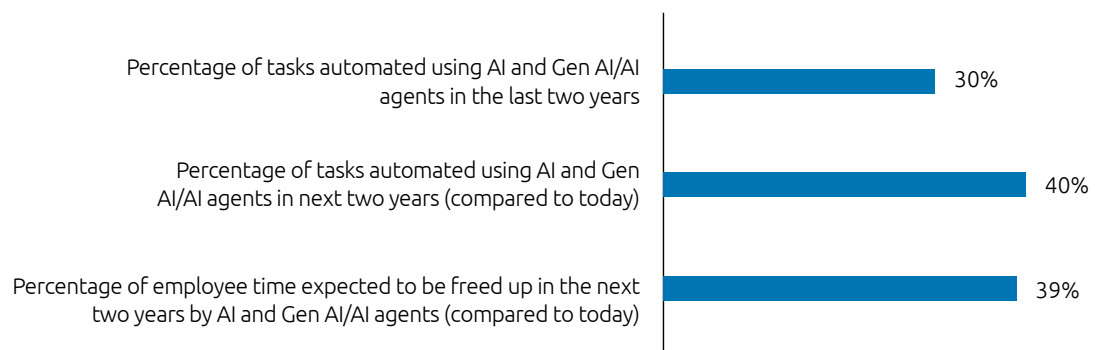
The CAIO at a multinational engineering organization says: *"Internal adoption of AI systems has driven enhancements in employee productivity, with initial increases of 17–18% accelerating to an impressive 22–27%, thanks to thorough monitoring and consistent reporting."*

16%

increase in employee productivity expected by organizations in the next two years

Figure 27.
Executives anticipate automating an additional 40% of tasks over the next two years using Gen AI and agentic AI

Impact of AI and Gen AI/AI agents on the volume of tasks performed by employees



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 1,007 executives who are from business functions like supply chain and procurement, finance and accounting, people operations and customer operations.

To effectively **utilize the productivity benefits**, organizations are **creating flexible work arrangements**, including remote work, flexible hours, and compressed workweeks, with 53% of executives supporting this approach. They are also **redirecting employee focus to more complex, creative, or customer-facing tasks**, as noted by 47% of executives. Additionally, organizations are **allocating freed-up resources to innovation and R&D**, with 47% of executives highlighting this strategy.

53%

organizations are creating flexible work arrangements for employees to manage the freed up resources efficiently

Adapt for shifting and emerging job roles

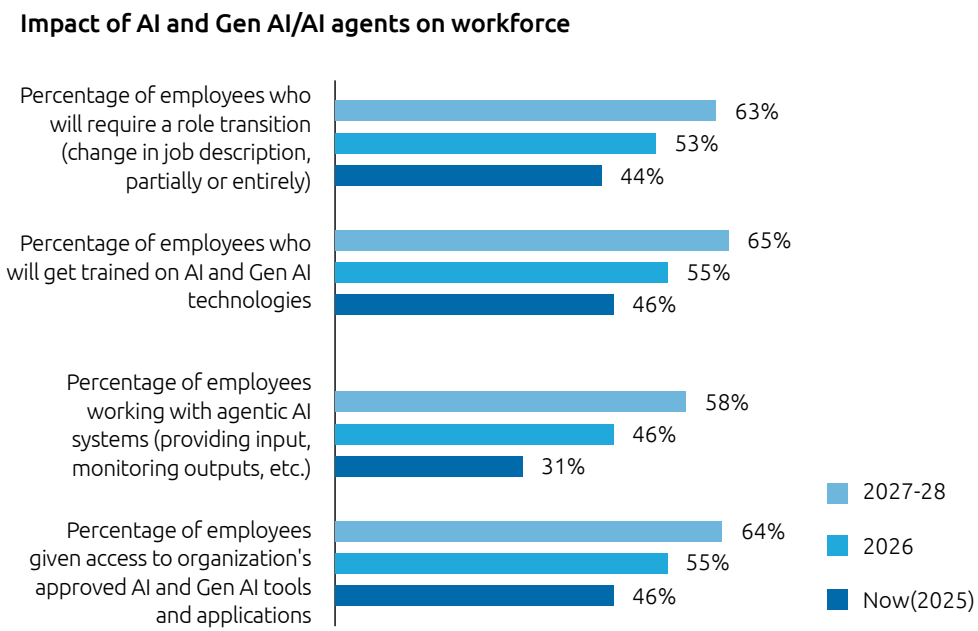
By 2027-28, nearly two-thirds of employees will have access to approved AI tools and applications (Figure 28), enabling organizations to scale productivity and innovation. But this expansion will demand robust governance. The anticipated increasing interaction with AI agents – from 31% in 2025 to 58% by 2027-28 – reflects a growing acceptance and use of agentic systems for decision-making and operational support. But this trend necessitates a cultural shift in which employees learn to collaborate effectively with AI, balancing trust in automated outputs with critical oversight.

Employee transition is pivotal to AI implementation, with **50% of organizations** actively supporting workforce adaptation to new roles. It is important to involve employees in the implementation process, conducting skill assessments and offering tailored AI training programs.

Training programs will play a pivotal role in this transition, as the percentage of **employees trained on AI technologies rises to 65% by 2027-28**. Beyond technical skills, these programs must focus on fostering adaptability, problem-solving, and ethical reasoning to prepare employees for hybrid human-AI workflows.

Perhaps the most striking insight is the growing need for job role transitions, with 63% of employees expected to see their job descriptions altered by 2027-28. This highlights the disruptive impact of AI on traditional roles, pushing organizations to rethink workforce planning, career paths, and employee engagement strategies. To thrive in this evolving landscape, businesses must prioritize proactive change management and invest in an agile workforce capable of navigating the complexities of an AI-driven future.

Figure 28.
AI and Gen AI's impact on workforce is expected to increase



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 1,607 executives.

Around 60% of executives feel that the implementation of AI, Gen AI, and AI agents will give rise to several changes. **Specialist roles**, dedicated to managing and maintaining AI and Gen AI systems, will emerge. **Leadership roles** will refocus on redesigning organizational structures and redefining roles to accommodate AI and Gen AI technologies. Additionally, **manager-level roles** will evolve to employ AI-enabled decision-making tools to enhance strategic capabilities.

For employers, this signals a need to **rethink workforce strategies**, harnessing technological versatility while capitalizing on human ingenuity and adaptability. This shift underscores the importance of preparing for a future where work is dynamically shared between people and AI-driven technologies.

63%

of employees will require a role transition by 2027-2028 due to AI automation and/augmentation

Kick off long-term cultural transformation

The transformation of the workforce will not be complete without a long-term focus on transforming organizational culture. It includes but is not limited to the following:

- Establishing a clear vision for Gen AI and agentic AI (e.g., all new products/services will be AI-first)
- Encouraging agency mindsets across the business (empowering employees to innovate with and develop the technology)
- Building resilience to deal with ambiguity, change, and disruption
- Building trust in AI systems among employees (through regular training, transparent communication about AI capabilities and limitations, addressing employee concerns, and involving employees in AI development and deployment)
- Reshaping the workforce mindset – employees must be supported in adapting to new modes of collaboration, where interacting with AI agents becomes as natural and productive as working with human colleagues.

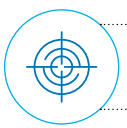
A marketing and communications operations leader at a leading professional services firm specializing in risk, strategy, says: *"Simply introducing new technology doesn't guarantee adoption – one must motivate and encourage employees to actively use AI tools. To support this, we are embedding AI integration into workflows with triggers and reminders to ensure consistent usage. Ultimately, long-term success hinges on changing employee behavior through structured AI engagement and reinforcement."*

3

Process readiness and reengineering – a prerequisite to harnessing the full potential of agentic AI

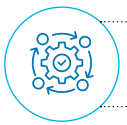
The rise of agentic AI presents a paradigm shift in automation, moving beyond task-based execution to more autonomous, goal-oriented operations. However, to fully leverage the transformative power of agentic AI, a robust methodology for process reengineering and redesign is crucial. A common pitfall in agentic AI initiatives is focusing too narrowly on individual tasks. For agentic AI, which thrives on understanding context and making complex decisions, it is possible – and more beneficial in our experience – to transform

higher-level business processes. Here we highlight several best practices to reengineer or redesign business processes for agentic AI implementation:



Defining a broader scope of implementation

Instead of targeting task-level use cases (L4 or lower), agentic AI should be applied at higher process levels (L3). This means looking at a collection of interconnected tasks that deliver a specific business outcome. This approach allows the agentic AI to manage and optimize a significant portion of a value stream, leading to more substantial impact. For example, instead of using agentic AI to reactively process incoming email requests for vendor support, design an AI-powered vendor assistant. This assistant could provide a proactive, self-service support channel with built-in automation, fundamentally changing the vendor interaction model from reactive to proactive and empowering.

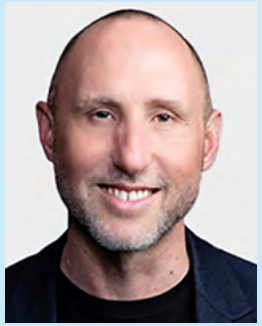


Follow a structured process transformation approach

It starts with understanding the existing process landscape through workshops and interviews, followed by a detailed analysis of selected processes using predefined criteria (e.g., high volume or frequency of transactions). The next step involves assessing the existing technology and data landscape, identifying reusable components, and exploring new technologies. A feasibility study is then conducted for the redesigned processes, evaluating technical, economic, and operational aspects. Finally, a high-level AI agent persona is defined, and the initiatives are prioritized based on business impact, feasibility, and strategic alignment.

4 Embrace agentic AI to complement existing AI applications and unlock larger transformational benefits

Our survey reveals that organizations that have integrated **AI agents with AI and Gen AI use cases** are experiencing high benefits, with an **average four percentage-point increase in cost savings** compared with those using only AI and Gen AI.



"After gains from RPA, traditional AI, and Gen AI, the next leap is agentic AI. To scale it with real impact, organizations need to shift their mindset, empower people to work differently, reimagine processes, and adopt modern technology. Leaders must balance improving today's operations with building for a future where AI agents drive new growth."

Craig Suckling
Chief AI Officer Europe,
Capgemini

Transformational benefits from AI agents will only be realized when organizations adopt them at scale – and do so strategically. Success starts with a phased approach: begin by deploying foundational AI agents with basic capabilities and progressively expand their scope and sophistication. Rather than rushing to full automation, businesses should focus on building a robust capability stack and maturing their AI readiness step by step. By establishing a strong operational foundation and scaling thoughtfully, organizations can unlock sustainable value and long-term impact from AI agents.

Organizations have multiple AI applications, with varying degrees of automation. Selecting the right use case for each business process is crucial. Our experience of working on business process transformation of global organizations allows us to map out processes and assess targeted implementation of AI/Gen AI versus agentic AI (see Figure 30).

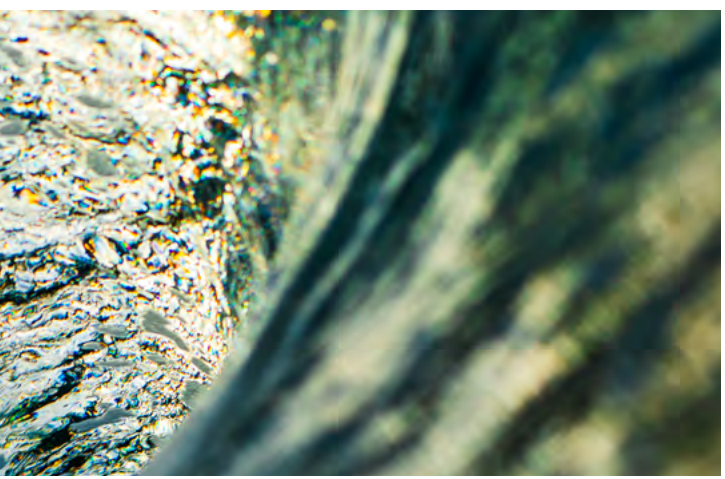
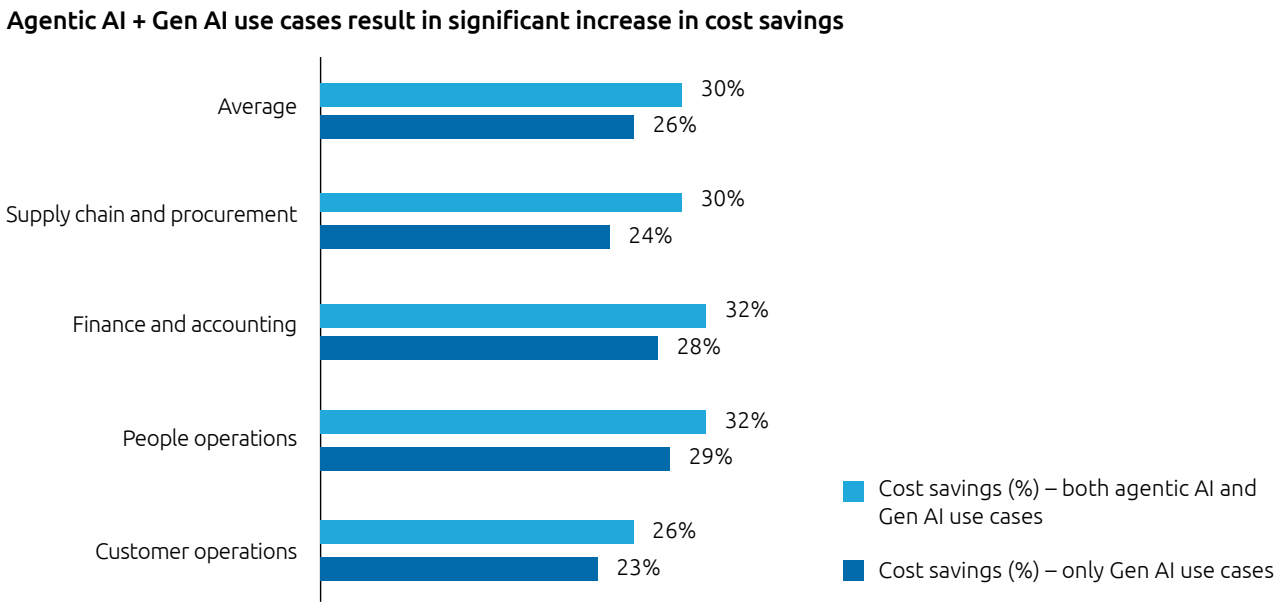


Figure 29.
Use of agentic AI in combination with Gen AI is expected to yield significant cost savings



Source: Capgemini Research Institute, AI-powered business operations survey, February – March 2025, N = 1,007 executives who are from business functions like supply chain and procurement, finance and accounting, people operations and customer operations.

"Choosing the right solution for each business process step is transformative. Not every step or use case needs generative AI or agentic AI and some tasks are best undertaken by humans. A balanced approach optimizes efficiency and decision-making, ensuring operations are secured, frictionless, and streamlined."

Sebastien Guibert
Head of Portfolio,
Capgemini's Business Services

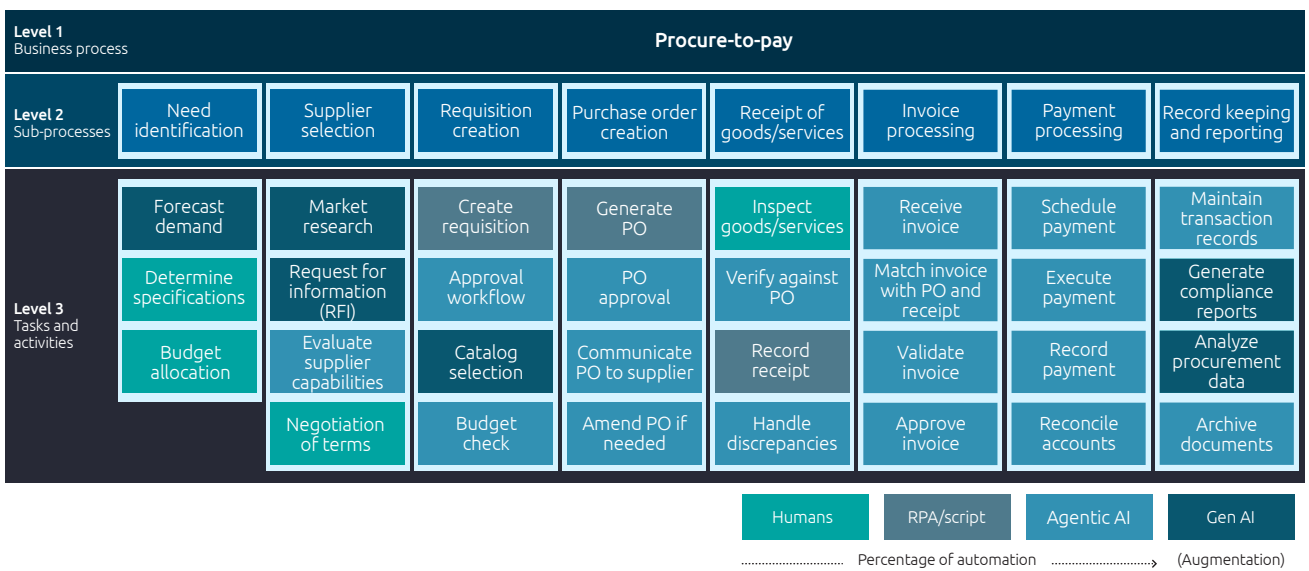
The **"procure-to-pay"** process offers an example of how organizations can use the strengths of each technology to optimize efficiency, accuracy, and decision-making across the procure-to-pay cycle. This framework could be applied to other corporate function processes.

As organizations increasingly deploy a combination of AI technologies – such as **robotic process automation (RPA), Gen AI**, and **agentic AI** – within a single business function, the need for robust **AI orchestration** becomes critical. To ensure seamless coordination and efficiency, enterprises must implement an **orchestration agent** capable of managing task assignments, overseeing data flows, and validating or overriding decisions and actions made by various AI systems. This orchestration layer acts as the central nervous system, harmonizing disparate AI tools to function cohesively. In parallel, organizations must establish a comprehensive **observability function** that provides real-time visibility into AI-driven decisions and actions, monitors system health, and enables rapid diagnostics in the event of failures. Together, orchestration and observability form the foundation for scalable, reliable, and accountable AI operations in complex enterprise environments.

Monte Carlo launched AI-powered **observability agents** to streamline data monitoring and troubleshooting. The **Monitoring Agent** suggests data quality rules, while the **Troubleshooting Agent** identifies root causes and recommends fixes—boosting data and AI reliability.[34]

In the complex world of expense processing—where receipts are messy, formats vary, and exceptions are common—traditional RPA often fails and escalates tasks to humans, creating inefficiencies. Samsung SDS approached this differently. They used Intelligent Document Processing (IDP) to extract structured data from unstructured receipts, and Generative AI (LLMs) to reason through ambiguous cases where rules fall short. An Automation Agent then presents the results to a human, captures their decision, and feeds it back into the system. Over time, the system learns from these inputs, reducing the need for human intervention. The result: over 80% reduction in processing time, improved compliance, fewer errors, and more satisfied finance teams.[35]

Figure 30.
Business processes benefit from a combination of AI approaches



Source: Capgemini Research Institute analysis.

"Before AI can transform a business, the business must first transform its processes by rethinking them end-to-end, not just at the use case level where ROI may be limited. Breaking processes into micro-tasks enables orchestration agents in multi-agent systems to identify and coordinate automation opportunities effectively. With high-quality data and attention to privacy and security, this approach supports hybrid human-AI teams and leads to significantly higher ROI, efficiency, and decision-making impact."

Sergey Patsko
Data & AI Group Offer Leader,
Capgemini

5 Maintain a strict focus on cost containment in AI implementation

According to the survey, more than two in five organizations (42%) identified the cost of AI implementation as a significant barrier to adoption. Factors such as infrastructure, skilled talent, and cloud services are expected to influence AI development costs. The cost of developing custom AI models can be substantial, involving extensive data collection, algorithm development, and rigorous training. Training advanced models such as GPT-4 or Gemini can lead to significant compute expenses. Businesses may also need to invest in proprietary datasets, which can be a major financial commitment. Additionally, integrating AI with existing legacy systems often requires considerable investment.[36]

"Effective AI cost management involves strategic investment, understanding pricing models, leveraging cloud auto-scaling, and investing in early PoCs. 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

AI services are offered through various commercial models, each with its own pricing structure. Understanding these models is crucial for effective cost management:

- **Per token pricing** is based on the number of tokens processed by the AI model. Tokens are the smallest units of text that the model processes, and pricing scales with the number of tokens used. This model is transparent and allows precise control over costs.
- **Per case pricing** bases costs on the number of individual cases or instances processed by the AI. This is common in applications such as image recognition or medical diagnostics, where each case represents a distinct input.
- **Per user seat pricing** is based on the number of users accessing the AI service, often used in enterprise software where multiple users need access to similar AI capabilities.
- Lastly, **subscription-based pricing** has a fixed fee (e.g., monthly or annually), providing predictability but lacking the flexibility of usage-based models.

Organizations are increasingly attempting to manage and reduce AI-related economical cost by using cost per inference measures, utilization rates, and ROI evaluation. Organizations are also adopting sustainable AI by designing energy-efficient models and upgrading to advanced hardware, helping reduce their data center footprint and environmental impact. Scalability metrics assess how well the AI infrastructure scales with increasing workloads, preventing cost overruns and ensuring sustainable growth.

Despite growing adoption of AI, few organizations are actively measuring its financial impact. The survey revealed that less than one-third (32%) of respondents use ROI as a key performance indicator (KPI) to evaluate Gen AI use cases. Without robust cost-containment strategies and ROI tracking mechanisms, businesses risk overspending on ineffective implementation.

According to survey data, executives have identified three major approaches to reducing operational expenses. To begin with, 55% of executives **focus on fine-tuning infrastructure configuration** to lower costs associated with storage, compute, and other services. By using cloud platforms, auto-scaling tools, and efficient resource-allocation techniques, businesses can significantly reduce overheads while maintaining performance.

Additionally, 53% of executives emphasize **designing cost-optimized solutions** that minimize dependencies on AI services. Furthermore, 50% of executives are **adopting open-source models and solutions to reduce operational expenses.**

These strategies reflect a growing emphasis on balancing performance with cost-effectiveness in AI initiatives.

53%

of executives emphasize designing cost-optimized solutions that minimize dependencies on AI services

6 Prepare for scaling up AI-powered business processes

Scaling AI-powered business processes requires careful planning.

According to 80% of executives, keeping up with rapid AI advancements is a significant challenge to securing investment. Without balancing innovation with stable tech adoption, businesses risk stagnation and operational disruption. For long-term implementation, the build versus buy decision is pivotal (see Figure 31).

Organizations need to focus on making informed, context-specific decisions about whether to build, buy, or adopt a hybrid approach for AI implementation. Figure 32 offers a practical lens to evaluate these options based on internal capabilities, speed-to-market needs, and the strategic role of AI. Aligning this decision with long-term business goals is essential for sustainable and scalable AI integration.

Figure 31.
Build versus buy for AI implementation

Decision	When it makes sense	Advantages
Building custom AI solutions	• AI is core to competitive advantage • Highly specialized requirements • Long-term investment feasible • Complete control over proprietary algorithms and models	• Tailored functionalities • Full ownership of algorithms and models • Sustainable for long-term goals
Purchasing AI solutions	• AI is not a core differentiator • Speed of deployment is crucial • Limited resources for maintenance	• Faster deployment • Cost-effective upfront • Lower annual maintenance costs
Hybrid approach	• Limited internal resources but needs customized solutions • Suitable for organizations seeking flexibility and scalability	• Custom applications built on purchased frameworks • Phased implementation for gradual scaling • Quicker overall implementation

Source: Capgemini Research Institute analysis.

According to our survey, 60% of organizations have established clear roadmaps for scaling use cases, supported by robust business case evaluations and defined ROI metrics. Executives in our survey emphasize **three key strategies** for scaling initiatives. They aim to **expand AI and Gen AI from non-core to core business operations, integrate AI and Gen AI across various business functions, and evaluate performance and provide comprehensive employee training.**

Nicole Onuta, Lead AI Risk Management at ING, says: *"Organizations need to make strategic decisions on whether to build or buy AI solutions. When AI models or applications are readily available, accessible, and economically feasible, it often makes sense to acquire them. However, when a solution requires a unique approach, must be customized to the organizational context, or involves sensitive or competitive information, it's often best to carefully design and develop in house."*

Some of the most important considerations are:

- **Prompting and guardrails engineering:** How to ensure that the best practices of prompting and guardrails engineering are disseminated throughout the organization?
- **Reusing, cascading, and choosing the right models and agents:** How to access the latest and most relevant models for Gen AI and agentic applications?
- **Multi-cloud infrastructure selection and control:** How to optimize cloud infrastructure usage and costs?
- **Performance and security monitoring:** How to monitor and manage the performance and security of multiple AI-enabled applications?
- **Lifecycle management of your AI estate:** How do you manage and keep improving your entire AI estate – retiring outdated/unsupported models, incorporating new ones, and keeping applications up-to-date?

A few best practices:

- Set up blueprints of processes, digital twins of activities, and micro-tasks
- Establish an integrated command center for reporting, forecasting, and next best action
- Put in place a data layer with advanced analytics modules, and data products per task
- Build a library or gallery with a variety of AI agents and low-code AI agents embedded in digital platforms, and pre-built and function-specific AI agents that are reusable and customizable.

Sustain the scale-up by future-proofing AI adoption

Looking ahead, organizations must take steps to make their AI deployments long lasting:

- Data-driven decision-making will become more prevalent, necessitating the use of data ecosystems to integrate newer sources of data, continuous improvement in model contexts, and a focus on the accuracy and transparency of AI output.
- There will be greater emphasis on implementing data-driven sustainability initiatives.
- Enhancing customer and employee experiences through AI and automation will remain a priority, delivering personalized interactions and intelligent, connected experiences.
- Finally, cybersecurity and trust will be paramount as digital connectivity increases.

80%

of executives say that, keeping up with rapid AI advancements is a significant challenge to securing investment

Conclusion

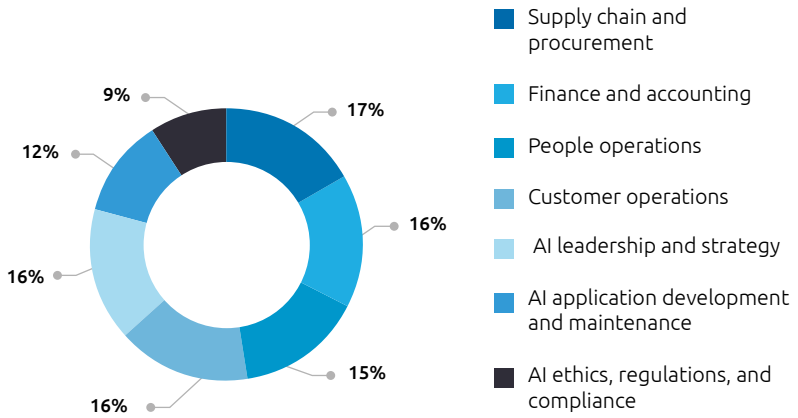
The impressive ROI and operational improvements reported by early adopters highlight the transformative potential of Gen AI and agentic AI, including improved operational efficiency, cost savings, and enhanced productivity. The competitive landscape is rapidly evolving, and those who embrace AI-driven innovation will lead the way. Delaying investment in these technologies could result in missed opportunities and blunted competitive edge. As our research shows, by making strategic investments in Gen AI and agentic AI, and laying down the foundations of AI readiness, governance, and workforce transformation, organizations can position themselves at the forefront of the AI revolution.

Research methodology

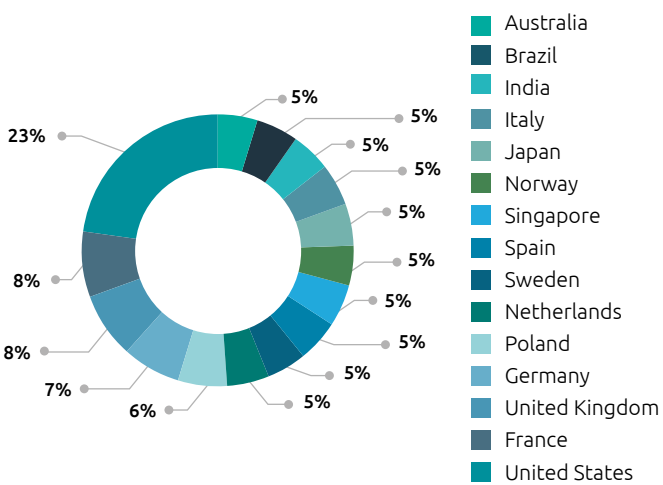
We surveyed 1,607 senior executives who are responsible and accountable for one or more AI and Gen AI initiatives. These executives are based in 15 countries and 13 sectors across North America, Latin America, Europe, and Asia-Pacific.

Executives surveyed were from organizations with at least $1 billion in global revenue in the past financial year. The global survey took place in February and March 2025. The distribution of executives are shown in the following figures.

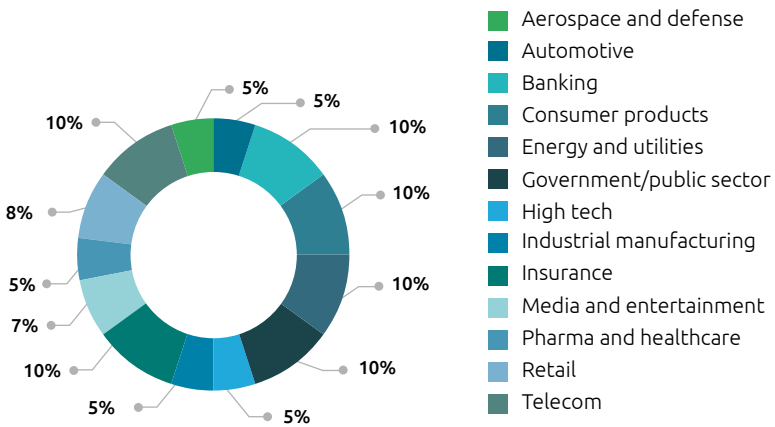
Executives by functional areas



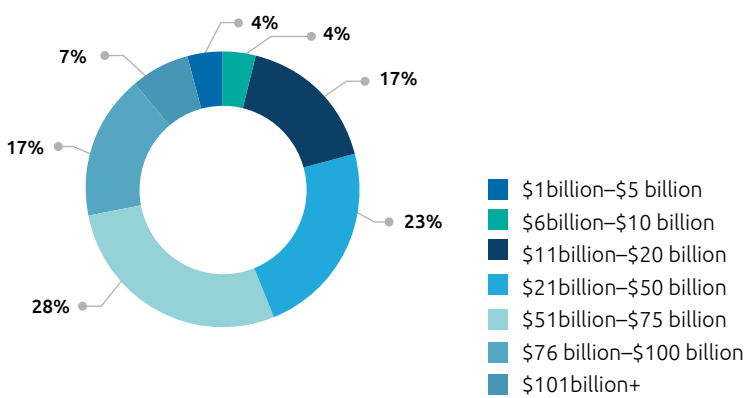
Executives by country



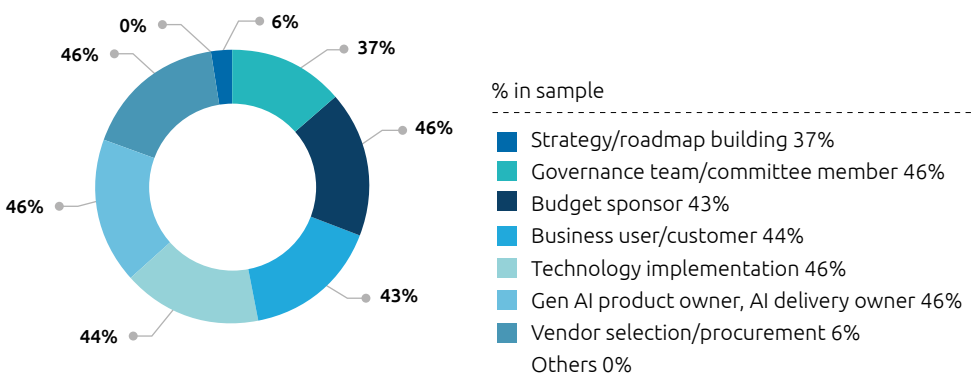
Executives by industry



Executives by organization's revenue



Executives by role in AI and Gen AI initiatives



To complement the survey findings, we conducted in-depth discussions with **15** senior executives from various sectors, including automotive, telecom, retail, high tech, pharma and healthcare, banking and insurance, and aerospace and defense. We would like to extend our special thanks to executives from the following organizations who took part in the in-depth interviews for this research:

- Johnson & Johnson
- Marsh McLennan
- Stellantis
- Microsoft
- elstra Limited
- Unilever
- EnBW
- ING
- Ericsson
- Google
- H&M
- ZF Group
- Warner Bros. Discovery
- Reliance Retail Limited
- Airbus

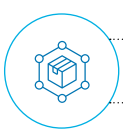
The study findings reflect the views of the respondents in our online questionnaire for this research and are intended to provide directional guidance. Please contact one of the Capgemini experts listed at the end of the report to discuss specific implications.

Our Services

Transforming business operations through AI, Gen AI and Agentic AI

Capgemini's growth strategy focuses on using AI and automation to **enhance business operations.**

Our portfolio is built around **five core domains** of expertise, that represent key business functions underpinned by *automation, AI, analytics, GenAI, and now Agentic AI*

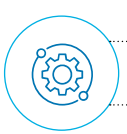


Supply Chain & Procurement Operations

Customer Operations

Finance & Accounting Operations

Financial Services Operations (Banking, Insurance, FCC)



People (HR) Operations

We offer both end-to-end transformation and delivery of the services.

We are addressing complex AI and automation integration challenges of our clients

Complexity of implementation

We can optimize integration considering ethical and regulatory aspects with the RAISE (Reliable AI Solution Engineering), a comprehensive platform designed to help organizations develop, deploy, and scale generative AI (GenAI) solutions in a cost-effective, trustworthy, and scalable way.

Resistance to change

OCM (Organizational Change Management) is the process, tools, and techniques used to manage the people side of change to achieve a desired business outcome. It's especially critical when implementing new technologies like AI, automation, or digital platforms. We offer OCM as part of our services.

Data quality & integration

Capgemini's **Data-Powered Operations Transformation** (DPOT) is a business transformation approach designed to help every organization generate actionable insights, enhance value, and accelerate the deployment of the Connected Enterprise by delivering data-powered, AI-driven, and highly automated business operations.

Revenue Assurance | Data Trust as a Service | Inventory Optimization and Insights | Carbon Reporting and Management

Capgemini's approach to AI integration is multifaceted

Gen AI and Agentic AI: Capgemini uses Gen AI to enhance human capabilities and automate complex tasks. Agentic AI involves custom AI agents that make decisions and execute tasks autonomously.

Faster execution | Greater efficiency | 24/7 productivity

AI-Driven Process Automation: AI automates business processes like order-to-cash, credit management, and dispute resolution, with AI agents handling tasks such as order capture and invoicing

Improved accuracy | Cost efficiency | Better cash flow

AI in Interactions: AI enhances customer and employee interactions through chatbots and virtual assistants, providing personalized support and streamlining communication

Personalized support | 24/7 availability | Faster response time

AI for Analytics: AI-powered tools extract insights from data, driving data-driven decision-making and continuous improvement in areas like customer behavior and supply chain optimization

Smarter decisions | Improved forecasting | Optimized processes

AI for Sustainability: AI supports sustainability initiatives by helping organizations measure, monitor, and manage their environmental impact, focusing on carbon reduction and ESG management

Accurate measurement | Informed ESG decisions | Sustainable growth

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Appendix

Meet the experts

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Sebastien leads the portfolio for Capgemini's Business Services Global Business Line. After a number of years as the projects and processes portfolio head for a Capgemini client, Sebastien worked in the Data & AI space, leading the AI Center of Excellence in France. Sebastien infuses AI and technologies such as Gen AI and Agentic AI into the heart of client solutions, driving a sustainable transformations journey to deliver enhanced productivity, efficiency, and concrete business outcomes.

Marek Sowa
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Marek A. Sowa leads Generative Technologies and Agentic AI Design for Business Services, helping enterprises transform business operations through scalable, high-impact AI solutions. His work unlocks measurable value by enhancing efficiency, employee experience, and enterprise agility.

Anne-Laure Thibaud
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Anne-Laure Thibaud leads a worldwide team accelerating the adoption of Generative and Agentic AI, helping organizations unlock business value through AI-driven transformation. With a focus on designing and operating high-impact solutions in collaboration with key technology partners, Anne-Laure champions new ways of working where human and AI agents collaborate to drive meaningful and sustainable outcomes at scale.

Sergey Patsko
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Sergey Patsko is a VP and Data & AI Group Offer Leader at Capgemini. He leads the team of Capgemini Offer Leaders in the core area of the Group – Data & AI. By developing offerings like Generative AI or Agentic AI, Capgemini enables businesses to optimize processes, create personalized customer experiences, and uncover opportunities for growth. Prior to joining Capgemini, Sergey worked on applications of AI for automation of manufacturing processes and Digital Transformation for Fortune 500 companies at General Electric. He was at the forefront of developing IoT platforms and applying AI to industrial operations. Sergey has a rich venture capital experience, having collaborated with AI startups in Silicon Valley. He holds a PhD in Applied Mathematics and a Master's degree from Stanford Graduate School of Business.

Steve Jones
Data-driven Business and Gen AI leader,
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Steve is the EVP for Data Driven Business & Agentic Architecture at Capgemini, he is a published author and contributor to numerous journals and conferences on the challenges of the business adoption of new technologies. His focus today is on how companies prepare themselves for the 50% AI future.

Meet the experts

Weiwei Feng
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Weiwei Feng is director at Capgemini, leading the development of the company's global Generative AI offering. With a strong background in consulting and innovation, she has been a pivotal role in building offers and assets, positioning Capgemini at the forefront of AI-driven solutions.

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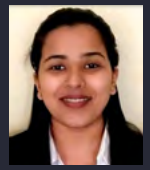

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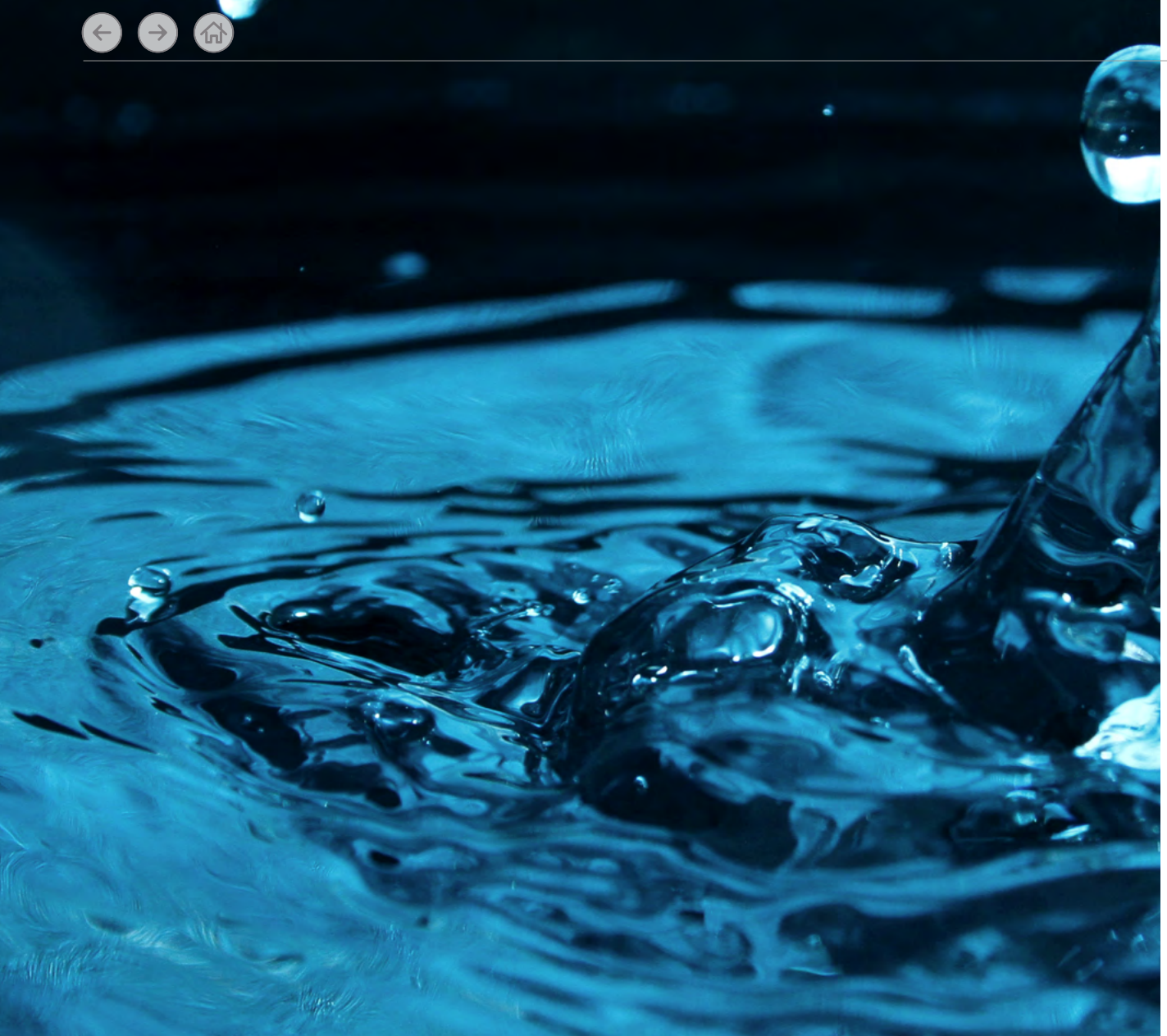

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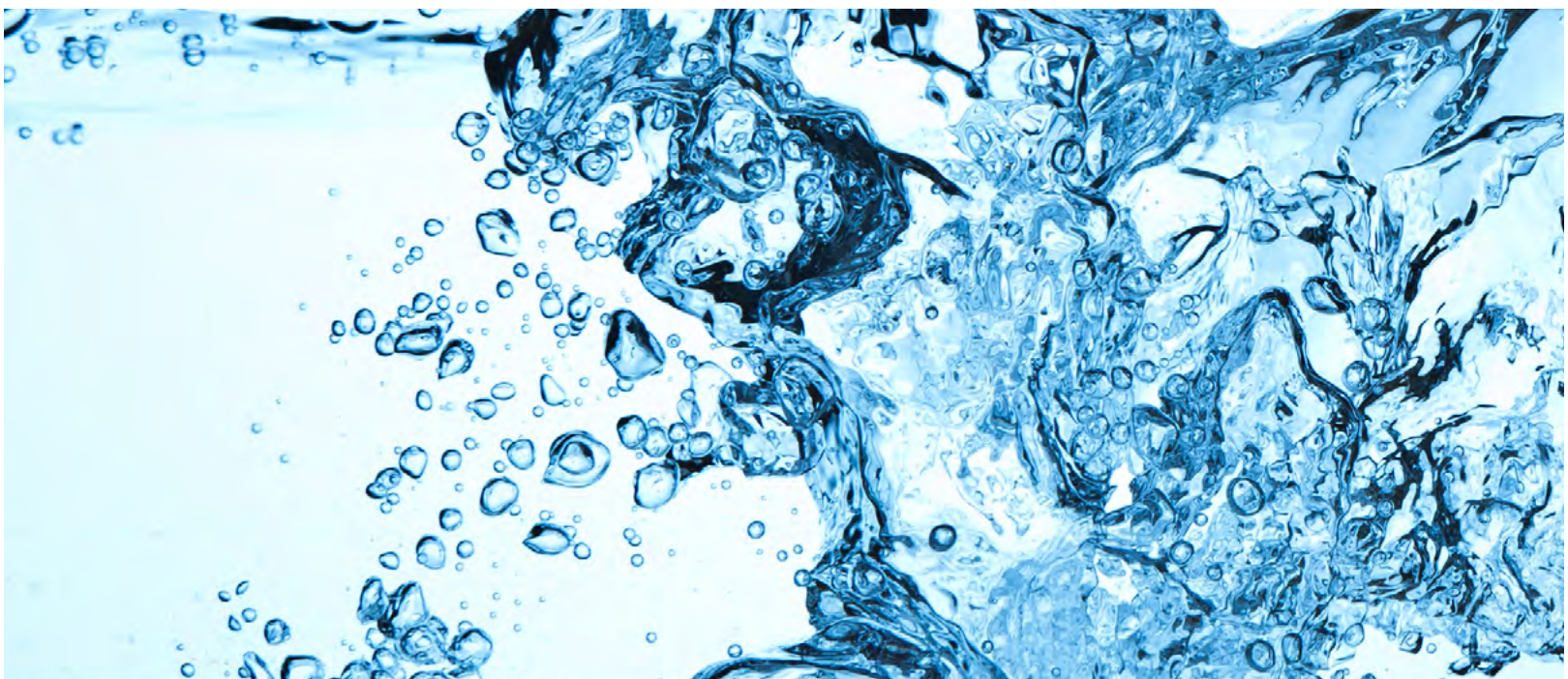

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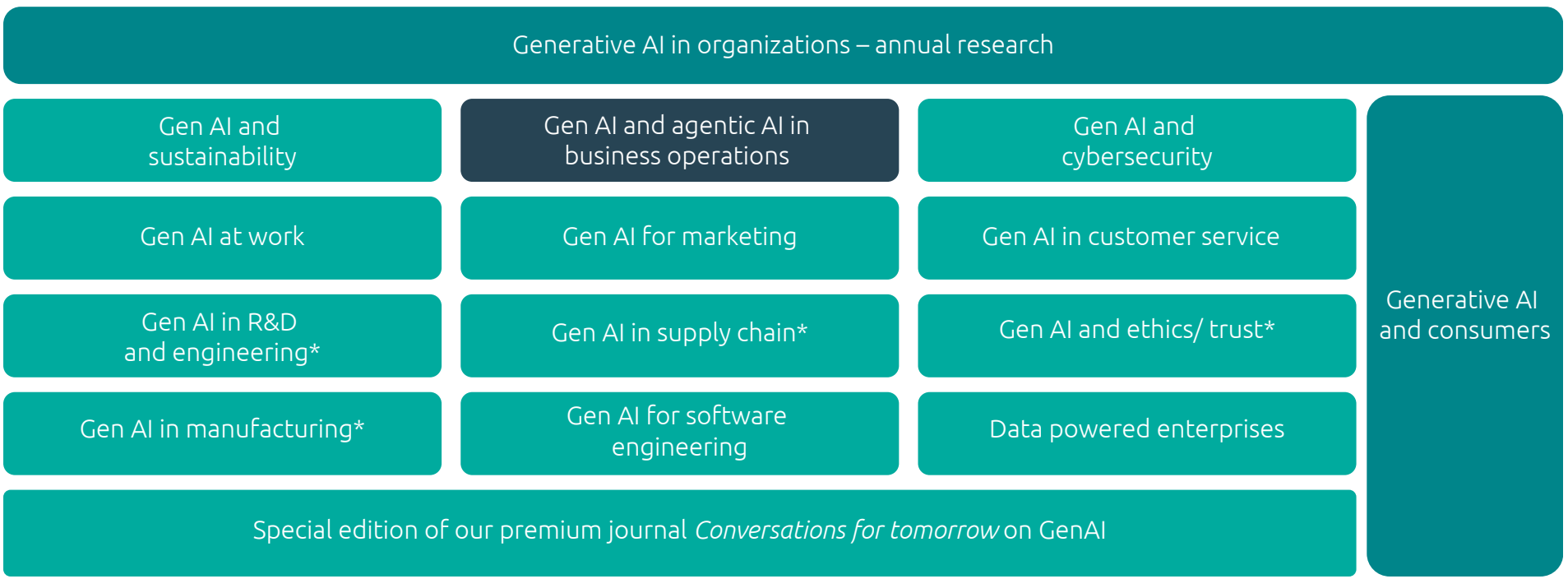

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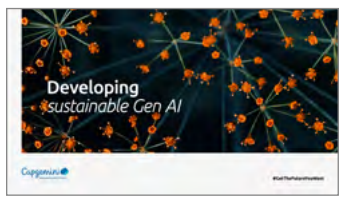

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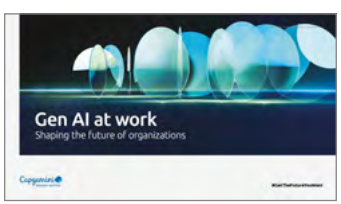

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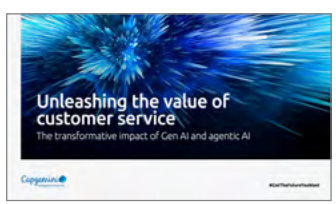

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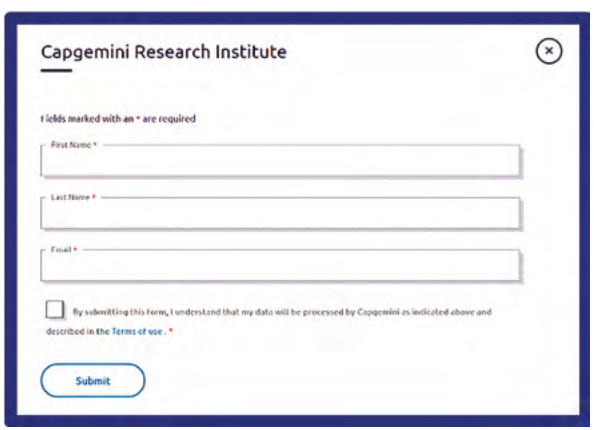

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