Research brief
Capgemini Research Institute 2026

The multi-year AI advantage

Building the enterprise of tomorrow.

Capgemini
RESEARCH INSTITUTE

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Research report

Long-form publications with detailed actionable recommendations:

- 10,000 to 15,000 words
- In-depth global surveys
- 15–30 focus interviews of senior executives sharing best practices
- Detailed recommendations

Research brief

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- 5,000 words
- Short surveys
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- Quick overview of recommendations

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- Executive and CXO interviews
- Multi-perspective essays
- Intographics and visual summaries
- Trend overviews

Who should read this report and why?

This report is designed for senior leaders who are shaping their organization's AI agenda and responsible for turning ambition into measurable impact. It examines how organizations across industries view AI today, with a focus on readiness, scaling strategies, and long-term value creation rather than short-term experimentation.

The insights are especially relevant for CEOs, CXOs, and senior executives in data, technology, strategy, finance, and operations who are navigating critical decisions about where to place bets, how to scale responsibly, and how to balance near-term results with long-term transformation. The report highlights what distinguishes organizations that are moving beyond pilots to sustained AI impact.

Readers will gain practical guidance on accelerating AI adoption, building trust, and effective human AI collaboration, and reshaping ways of working to unlock enterprise-wide value. The findings are based on a global survey of 1,505 senior leaders at director level and above across 15 countries and conclude with actionable recommendations to help leaders advance their AI journeys.

01

Executive summary

Executive summary

AI is a strategic imperative regardless of market sentiment

Leaders across industries increasingly view AI as a long-term strategic imperative rather than a discretionary or experimental technology. Our survey shows that, despite short-term uncertainty, confidence remains high in AI's ability to deliver transformative impact. AI has crossed a critical threshold: for CEOs and CXOs, the question is no longer whether to pursue AI, but how to embed it into the fabric of the enterprise. As a result, organizations are accelerating investments to build AI as a long-term operating capability, with more than half of organizations committing to sustained, multi-year investment horizons. This approach reflects the belief that consistent, long-term investment in AI builds cumulative benefits such as deeper capabilities, stronger data foundations, and accelerated innovation that late adopters will struggle to replicate.

Organizations are also seen balancing long-term vision with near-term priorities. Leaders are pursuing tactical initiatives that deliver quick returns while consolidating programs around high-value areas. Even in the event of an AI winter (a global decline in AI optimism), most expect continued investment in core capabilities and AI-driven transformation, with organizations shifting focus toward proven, scalable areas rather than experimental projects.

AI budgets are also set to rise. On average, organizations globally expect to allocate 5% of their annual business budget to AI initiatives in 2026, up from 3% in 2025. At the same time, leaders recognize the stakes: failing to scale AI as quickly as competitors could mean missed opportunities and lost strategic advantage. Over the next 12 months, organizations aim to accelerate investments in infrastructure, data, governance, and workforce upskilling, laying a strong foundation for sustainable AI adoption and impact. Further, AI is emerging as a strategic engine for enterprise growth, and efficiency delivering business value beyond productivity gains.

AI is now across the organization

Organizations globally are prioritizing AI investments in functions with well-defined processes and measurable outcomes. Our survey shows that more than half plan to concentrate AI investments in functions such as sales and marketing, as well as IT operations.

In addition to traditional machine-learning approaches, organizations are also exploring physical AI and other emerging AI technologies. Gen AI has crossed the threshold from pilots to scaled use, with 38% of organizations already operationalizing Gen AI across their businesses. Agentic AI systems (AI agents with varying levels of autonomy and human oversight, capable of supporting decision-making) are gaining traction, with six in ten organizations currently exploring their applications. Similarly, edge AI is drawing in more interest, with nearly half of organizations reporting limited or full deployment across functions and locations.

Organizations face a key decision: Should they build AI capabilities in-house or buy them externally? The prevalent AI approach emphasizes building AI applications and capabilities where they create differentiation, buying commercial AI tools and platforms where they accelerate progress, and orchestrating proprietary value on top of commodity models. Off-the-shelf offerings are accessible and cost-effective, while in-house development is best for unique, customized, or sensitive use cases.

- **Around 40% of organizations purchase commercial or off-the-shelf AI solutions.**
- **31% primarily build capabilities internally.**

Executive summary

Enterprise-wide AI adoption is a new discipline, and the playbook is still evolving

As organizations move from pilot stage to scaling, accelerating AI adoption demands a systematic approach and disciplined execution. Organizations are exploring multiple models for enterprise-wide adoption, and strong executive sponsorship is widely regarded as the most effective catalyst (67%). Other key enablers include external partnerships (59%), regulatory clarity and ethical frameworks (53%), workforce upskilling (53%), robust governance (53%), and scalable data infrastructure (51%).

Measuring AI success is also evolving beyond Return on Investment (ROI) to include metrics such as revenue growth, market share impact, and competitive positioning.

Data and AI sovereignty are emerging as a new strategic imperative

Data sovereignty is emerging as a critical priority amid broad macroeconomic and geopolitical shifts. 54% now prioritize data sovereignty, ensuring that sensitive or regulated data remains under their control, even when used with external AI models or platforms. Building on this, AI sovereignty is gaining importance as organizations seek greater control over the models shaping critical business decisions.

Why leaders need to focus on human-AI chemistry and trust

With AI augmenting processes and automating routine tasks, human judgement, accountability, and decision ownership remain central. Human–AI chemistry refers to designing AI systems where humans retain control over critical decisions, guide AI behavior, and intervene when needed–ensuring accountability as AI takes on a greater scope. This collaboration is already driving efficiency and productivity, but trust in this human-led model is essential to unlocking full value. Organizations are beginning to operationalize this approach:

- **66% confirm that human–AI collaboration has led to measurable improvements in productivity and decision quality,**
- **59% report that employees feel empowered to use AI in their daily work,**
- **48% mention that their organization has clearly defined roles and responsibilities for humans and AI systems to work together effectively**

To prepare for an AI-enabled future, organizations are reimagining the future of work and driving a cultural shift that goes beyond traditional training. Many are rethinking critical skills, six in ten organizations are redefining required skillsets across roles to align with AI adoption, and 64% are actively enhancing human–AI collaboration. Additionally, about half are focusing on specialized areas such as AI model evaluation and ethical decision-making to foster true human–AI synergy.

AI is not replacing humans. Rather, it is amplifying and supporting their capabilities. Organizations that invest in both technology and skill development will lead in productivity and innovation.

Recommendations - Reimagining the AI-augmented enterprise

To scale AI effectively and sustainably, organizations must focus on four strategic imperatives:

- **Strengthen AI essentials to unlock enterprise-wide intelligence:** Build the foundational engine for organization-wide access and value generation
- **Advance AI readiness through governance, alignment, and strategic guardrails:** Ensure AI is secure, resilient, and strategically aligned as adoption accelerates
- **Build human-AI chemistry as a core organizational capability:** Enable seamless, intuitive, and high-trust collaboration between humans and AI
- **Scale AI value by balancing "Transform Now" and "Build Tomorrow":** Deliver operational efficiency today while building engines for tomorrow's reinvention.

Key definitions

In this research, when we refer to ***artificial intelligence (AI)***, we mean the full range of technologies that enable machines to learn, reason, and make decisions–either by analyzing data, generating content, or taking autonomous actions.

We use AI as a collective term to reflect the full spectrum of capabilities. This includes, but is not limited to:

Machine learning (ML)

Systems that learn from data to make predictions or identify patterns.

Generative AI (Gen AI)

A subset of AI that harnesses the power of extremely large models and massive scaling of data and computing power to generate new content based on patterns and data it has learned from, including text, image, video, audio, and code.

Agentic AI

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 independently without human intervention—such as adjusting manufacturing processes in real time or planning and executing lab experiments.

Edge AI

The deployment of AI algorithms and models directly on edge devices such as IoT sensors, cameras, smartphones, industrial machinery, or autonomous systems, rather than relying on centralized cloud servers for processing. This approach combines edge computing (processing data close to where it is generated) with AI capabilities, enabling real-time data analysis and decision-making locally.

02

AI is a strategic imperative regardless of market sentiment

AI is core to long-term transformation – embedding intelligence across functions

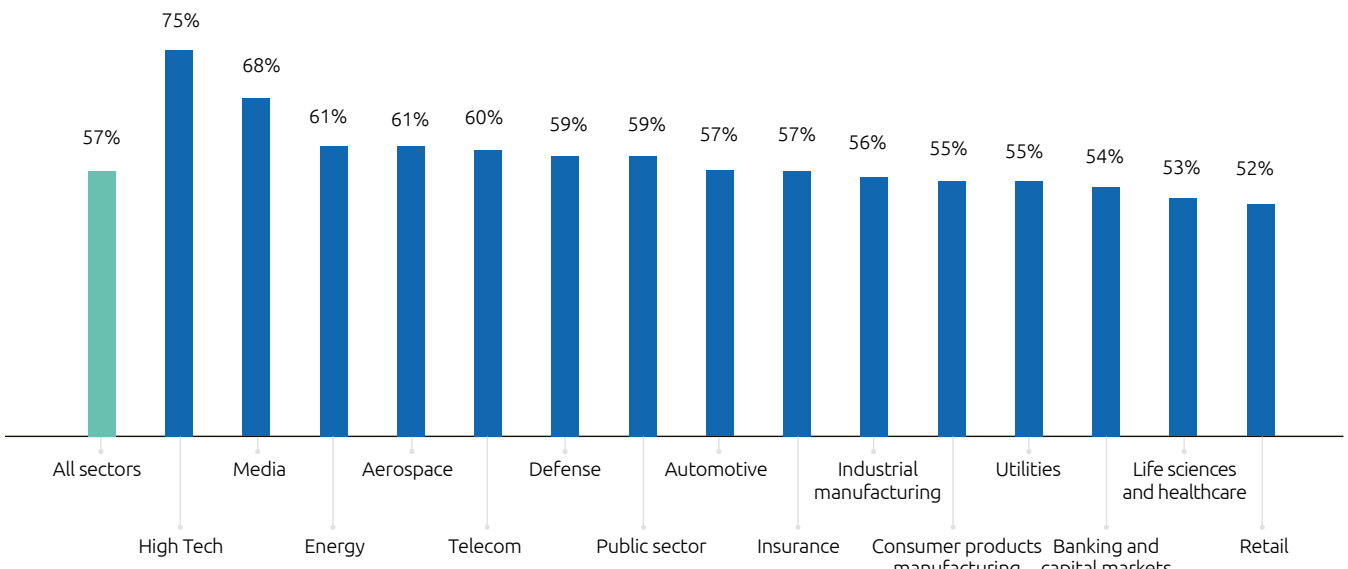
53%

of organizations view AI as a long-term capability tool, with a 5+ year investment horizon that will embed intelligence across functions.

Despite short term uncertainty and early-stage challenges, organizations view AI as foundational for competitiveness, future-proofing, and long-term value creation.

More than half of organizations believe that, despite short-term uncertainty, AI will have long-term transformational impact

Percentage of organizations who believe AI will have long-term transformational impact on their organization despite short-term uncertainty, by industry

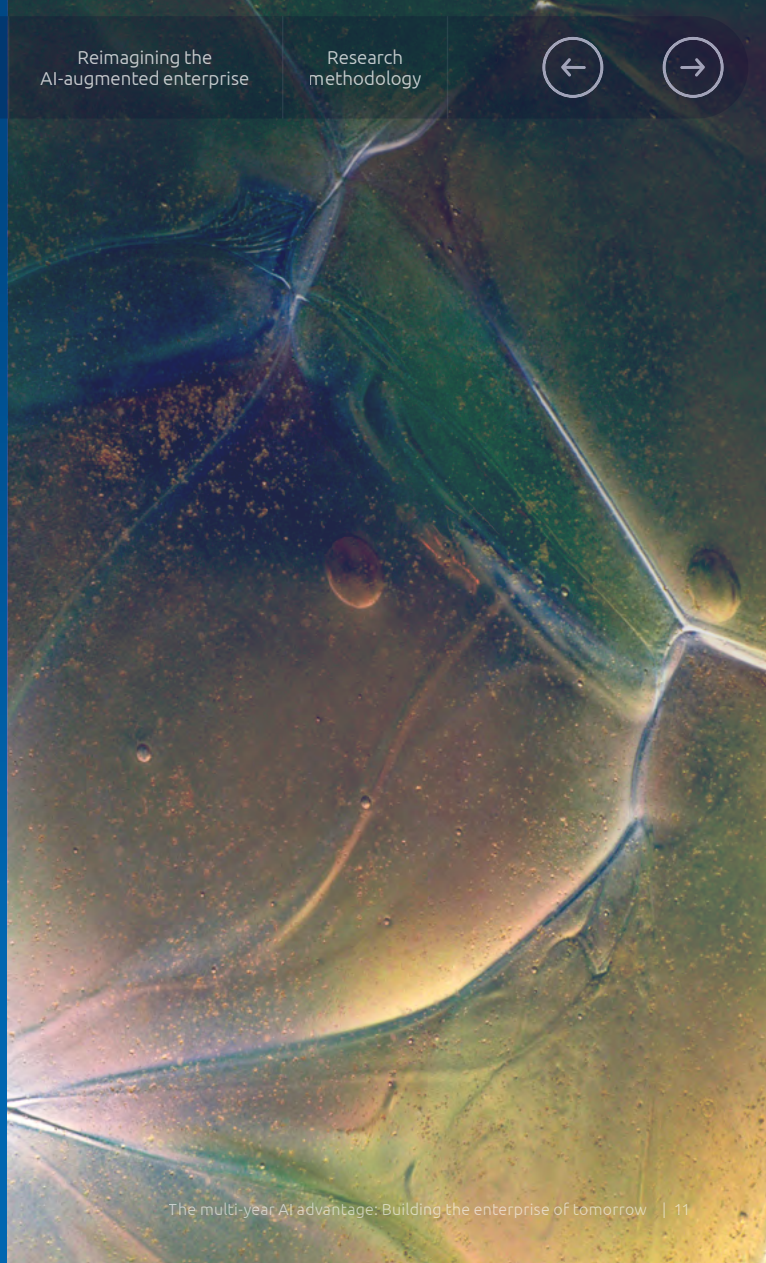


Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,205 organizations.

Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,205 organizations.

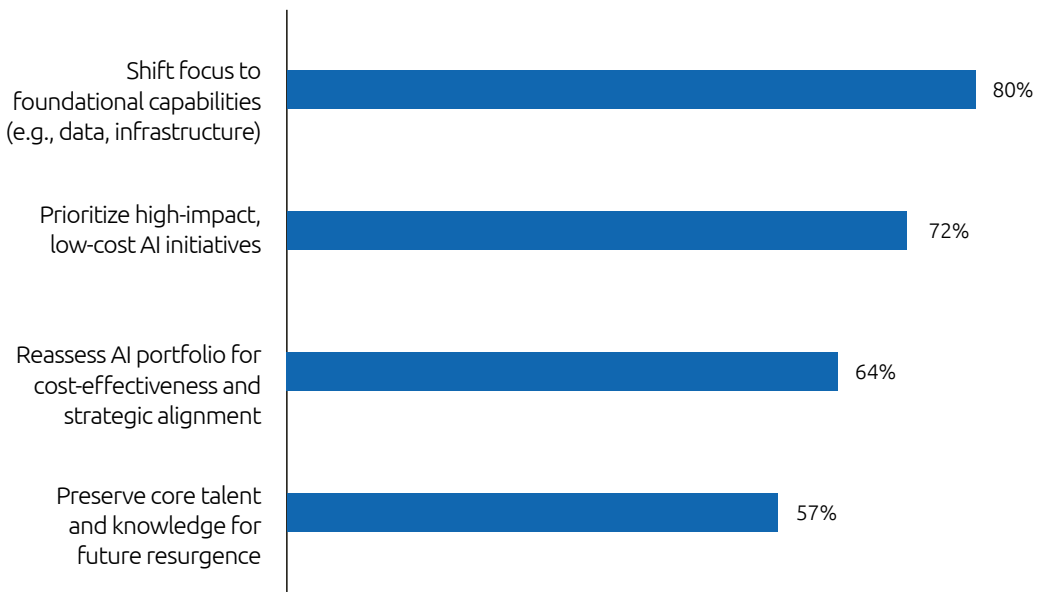
"I think you're going to hear this from lots of companies and lots of industries that people are very focused on taking advantage of this acceleration in [AI] technology to really allow automation, efficiency and therefore, investment. This is one of the reasons why we're optimistic about the forward: the productivity gains in the economy from enterprises are going to be very meaningful over the next few years, and that creates a good tailwind that will balance other macro factors that may or may not come into play."[1]

David Solomon
CEO, Goldman Sachs



Organizations plan to sustain investments in AI, even during a potential AI winter

How is your organization preparing to navigate a potential AI winter, where global optimism around AI could decline over the next 2–3 years?



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

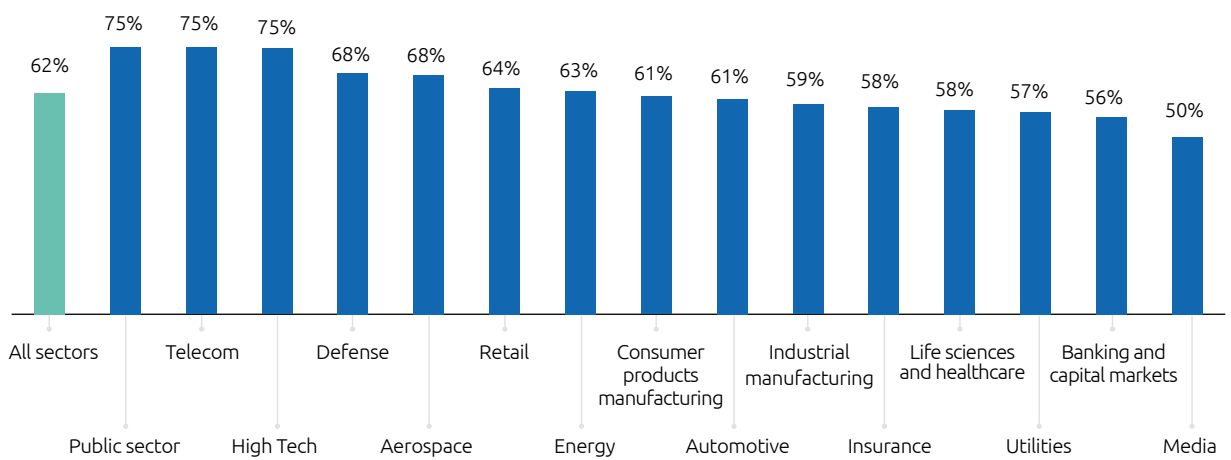
Organizations are now willing to disassociate themselves from concerns around AI winter, given the benefits they are seeing and the risk of losing competitive advantage by not moving fast.

Brook Selassie, vice president of AI and Business Growth Strategies at Gartner, explains the fear of missing out among organizations he spoke to. He notes:

> ***"AI is creating winners and losers. In every sector, a relatively small circle of major players shape the competitive landscape. And we don't expect success to be shared evenly, as if each would claim an equal share of opportunity. Far from it. Advantage will concentrate, and the gains will flow disproportionately to those able to harness AI most effectively."***[2]

Enterprises are prioritizing proven, scalable areas for their investments

Percentage of organizations who agree to the statement - ***"There is a growing sense internally that AI spending needs to be more focused on proven, scalable use cases rather than experimental projects."***



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

AI investments have now become more strategic and focused.

64%

of organizations say they have started pausing lower-value AI projects to redirect their efforts toward high-impact areas.

63%

of organizations expect to rationalize or consolidate their AI initiatives over the next year to concentrate on their resources where value is demonstrably higher.

Organizations are steering their investments toward domains with a proven ability to scale effectively

> ***"We prioritize our use cases and work on those that will have the most value for the company, working closely with the CFO office."***[3]

Andy Markus
Chief Data and AI Officer, AT&T

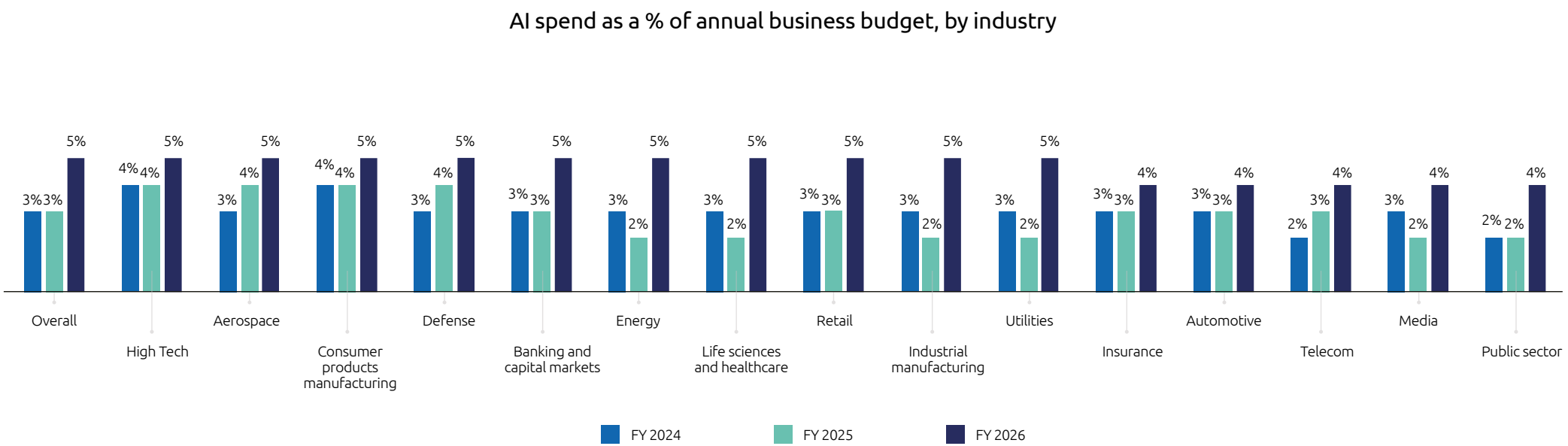
Volkswagen Group will invest $1.17 billion by 2030 in AI technologies to advance vehicle development and IT infrastructure, aiming to save €4 billion by 2035 through scalable AI use across its value chain.

> ***"Our ambition is to accelerate our development of attractive, innovative vehicles and bring them to our customers faster than ever before. To achieve this, we deploy AI with purpose: scalable, responsible, and with clear industrial benefits. Our ambition: No process without AI."*** [4]

Hauke Stars
Member of the management board for IT, Volkswagen Group

Pfizer uses/piloted Gen AI across 17 use cases, from scientific and medical content generation to manufacturing and more. The company estimates cost savings from $750 million to $1 billion annually from some of the priority use cases.[5]

AI budgets are soaring, with organizations across industries seeing failure to rapidly scale AI as a competitive disadvantage



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,205 organizations.

Organizations are increasing AI spend as the cost of not scaling becomes clearer

68%

of organizations are making tactical AI investments focused on short-term payback (2–3 years).

66%

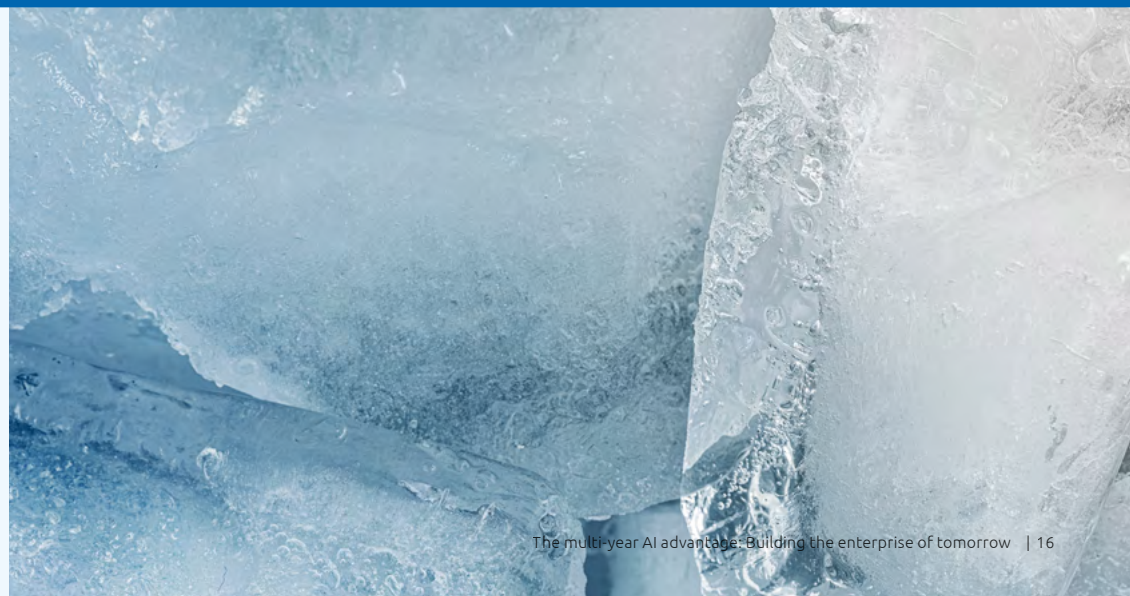
of organizations believe if they fail to scale AI as rapidly as their competitors, they risk missing strategic opportunities and losing their competitive edge.

53%

of organizations are increasingly focused on measurable business outcomes (e.g., revenue growth, cost reduction, customer experience) when evaluating AI investments.

Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,205 organizations for the first statement and N = 1,505 for the second and third statements.

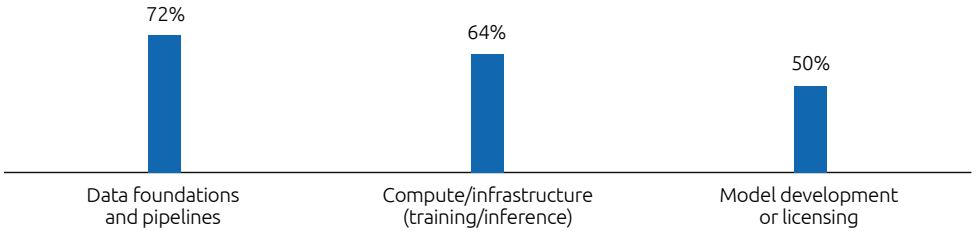
Google	Google is committing $40 billion through 2027 to expand cloud and AI infrastructure across the US.[6]
Lockheed Martin	Lockheed Martin, the American defense and aerospace manufacturer, launched Astris AI, a dedicated AI subsidiary in December 2024 to commercialize its advanced AI tools and platforms for customers across defense, aerospace, finance, healthcare, energy, and manufacturing.[7]
Bosch	Bosch, the German multinational engineering and technology company, plans to invest $2.7 billion in AI by 2027.[8]



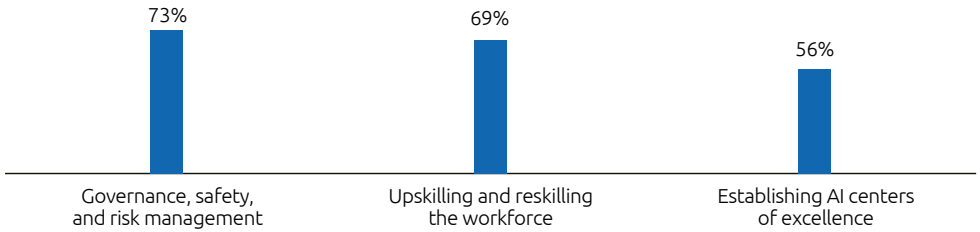
2026 is the year of infrastructure scale-up

In 2026, organizations intend to allocate AI resources towards building robust data and technical capabilities alongside organizational and cultural readiness.

Organizations expect to see the fastest growth in AI investments in the following technical capabilities over the next 12 months



Organizations expect to see the fastest growth in AI investments in the following organizational and cultural enablers over the next 12 months



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

Eli Lilly

Eli Lilly, an American pharmaceutical company is building an in-house supercomputing "AI factory" to manage the full AI lifecycle, from data ingestion and training to fine-tuning and large-scale inference, enabling scientists to train models on millions of experiments and accelerate drug discovery.[9]

Toyota

Five Toyota Group companies (AISIN Corporation, DENSO CORPORATION, Toyota Tsusho Corporation, Toyota Motor Corporation, and Woven by Toyota, Inc.) have launched the Toyota Software Academy to build AI and software talent, alongside GAIA, Toyota's Global AI Accelerator, to boost AI R&D and innovation. These initiatives aim to develop expertise and create AI-driven products for safer, more secure mobility.[10]

Enterprises are pairing AI infrastructure expansion with broad-based training efforts

Infrastructure investment

OpenAI × NVIDIA partnership

OpenAI and NVIDIA announced a strategic partnership to deploy 10GW of NVIDIA systems, representing millions of GPUs for OpenAI's next-generation AI infrastructure. To support the partnership, NVIDIA intends to invest up to $100 billion in OpenAI progressively as each gigawatt is deployed.[11]

AWS India expansion

$AWS will invest $7 billion in India over the next 14 years for a massive expansion of its cloud data center infrastructure footprint.[12]

AI training programs

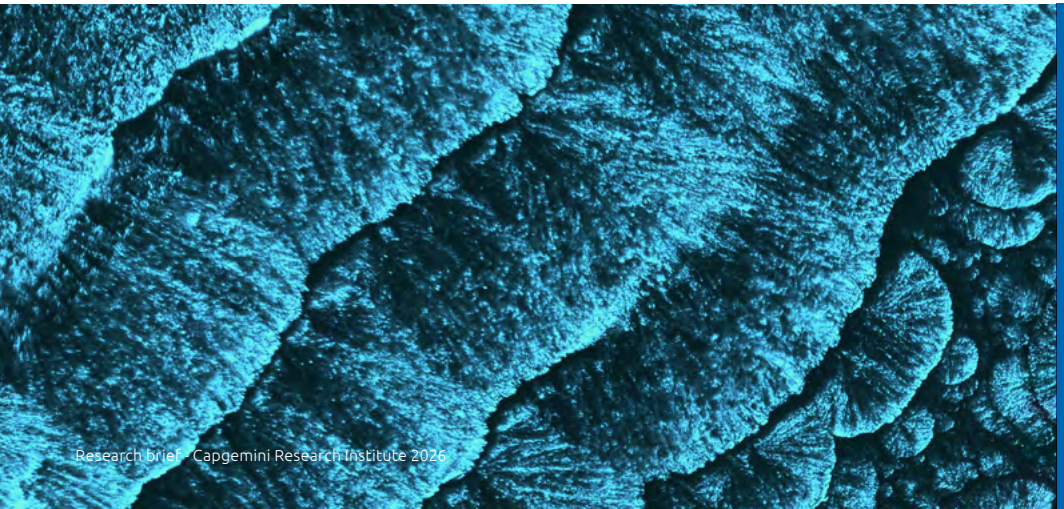
AT&T AI education

AT&T has established AI training programs so that employees can start to understand how AI can augment their daily activities. AT&T now has employee education programs where 50,000 employees have completed AI training, and new trainings are continually being added.[13]

AI is expected to deliver broad business value beyond productivity gains

Percentage of organizations ranking top 5 areas where they expect to derive the most value from AI investments

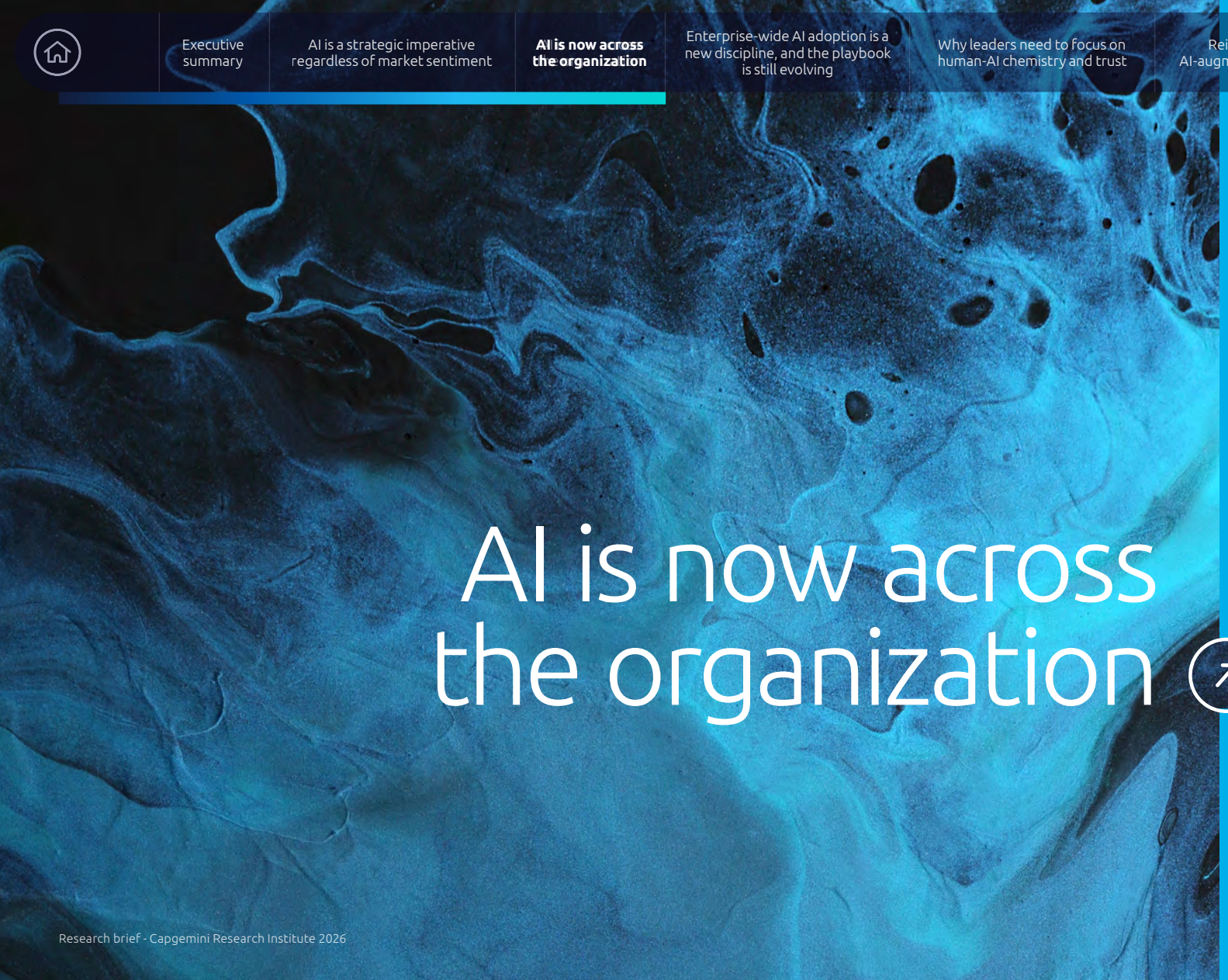
Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.



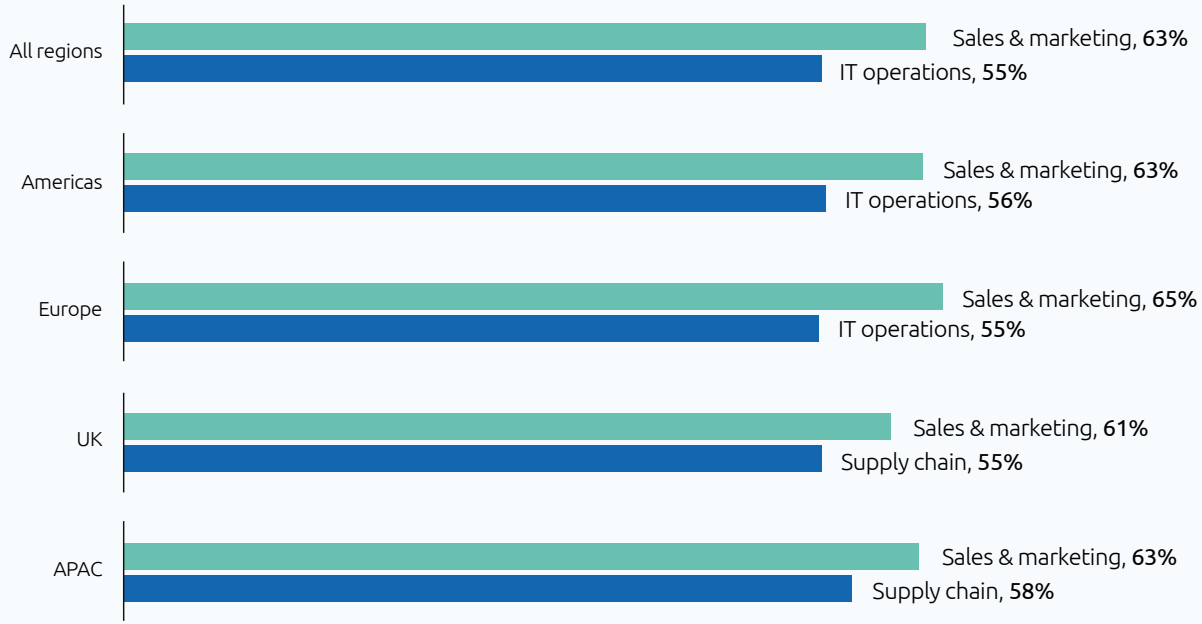
AI is without doubt the defining technology of the decade, but the pace of investment has outstripped the speed at which organizations have deployed and extracted value from it. Taking stock of where some of their AI experimentations failed to deliver the expected outcomes, business leaders now understand that the issue didn't come from the technology itself but from the business approach and methodology. Full-scale deployments will take time, and long-term value will not lie in isolated AI use cases but in enterprise-wide implementations. While the true growth phase begins, an AI ecosystem more rooted in operational value and enterprise architecture is emerging, starting with data foundations and infrastructure, and focusing on "Human-AI chemistry".[14]

03

AI is now across the organization



AI investment hotspots: Sales & marketing remains the top global priority for the year ahead



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

"AI is going to affect every application, every job, every customer interface."[15]

Jamie Dimon
CEO, JPMorgan Chase

"The fastest wins are in functions where processes are well-defined and outcomes are known and measurable, such as customer service and sales. AI agents will also enhance creative processes."[16]

Dr. Suraj Srinivasan

Philip J. Stomberg Professor of Business Administration, Harvard Business School

"We continue investing in AI capabilities across media buying, creative and measurement… we believe that AI will revolutionize every part of the marketing value chain. And over the past quarter, we've seen how our customers are increasingly focusing on optimizing the use of AI."[17]

Philipp Schindle

Senior Vice President & Chief Business Officer, Google

Organizations globally are focusing AI investments in functions where outcomes are known and measurable

AI has progressed beyond experimentation to become a core enabler across organizations, cutting across horizontal functions, vertical domains, and critical processes such as IT, KYC, underwriting, and customer onboarding.

Where enterprises see early AI wins

Sales and marketing

In large-scale experiments at a global online retailer, integrating Gen AI into seven customer-facing workflows delivered sales uplifts of up to 16.3%, with constant inputs and prices.[18] WPP and Google announced an expansion of their partnership, with a spending commitment of $400 million from WPP for Google technologies, to empower brands to create hyper-relevant campaigns in days.[19]

IT operations

NVIDIA will invest $1 billion in Poolside, which offers AI-powered coding assistants. This move is meant to strengthen Nvidia's influence in the Gen AI software ecosystem, as it seeks to strengthen integration capabilities between its GPU hardware and emerging AI application layers. [20]

Supply chain

DHL boosted investment in UK and Ireland with $737 million for AI-powered warehouse robots, aiming to improve efficiency and employee safety.[21] Amazon invested over $35 million in India to scale AI-driven supply chain digitization, by pushing AI and cloud access to millions of small businesses, making listing, inventory, shipping, and selling easier than ever. Earlier, AWS committed about $12.7 billion by 2030 to build cloud and AI infrastructure in India.[22]

R&D

Nokia announced a $4 billion investment to expand US R&D and manufacturing, focusing on AI-ready mobile, fixed access, IP, optical, and data center networking technologies.[23]

Customer service

Salesforce and ServiceNow are investing $1.5 billion in Genesys to enhance Conversational CRM, AI voice agents, and agentic AI capabilities.[24]

Manufacturing

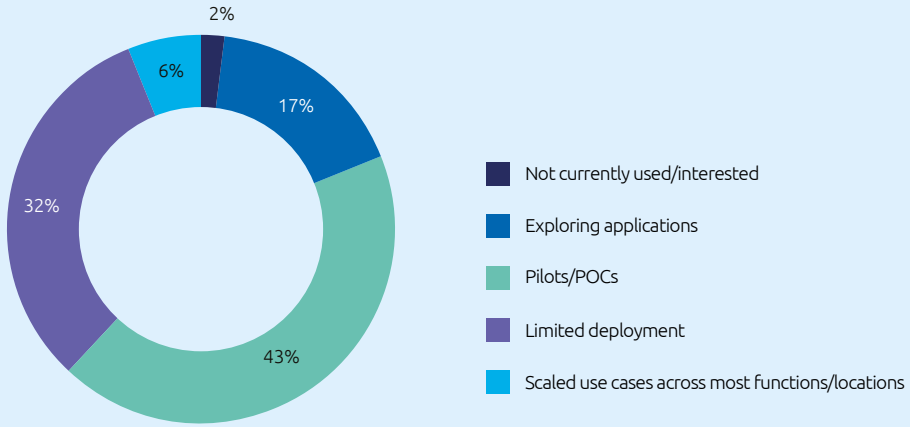
Siemens is committing more than $10 billion in investments to expand its operations in the United States. The move includes new manufacturing infrastructure and the acquisition of an American software company, aiming to support domestic production, workforce expansion, and artificial intelligence capabilities across critical industries.[25] Bosch is investing $2.7 billion to pace the application and development of AI by the end of 2027, by embedding AI into its products and services across mobility, manufacturing and consumer sectors. [26]

Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

Gen AI crosses the threshold from pilots to scaled use

38% of organizations have already scaled their Gen AI use cases.

Percentage of organizations at each stage of Gen AI maturity



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

Three in five (61%) expect Gen AI to create a major impact for their organization in 2026, followed by physical AI (43%), while ML leads with 72%

Worldwide Gen AI spending is expected to total $644 billion in 2025, an increase of 76.4% from 2024, according to a forecast by Gartner, Inc.[27]

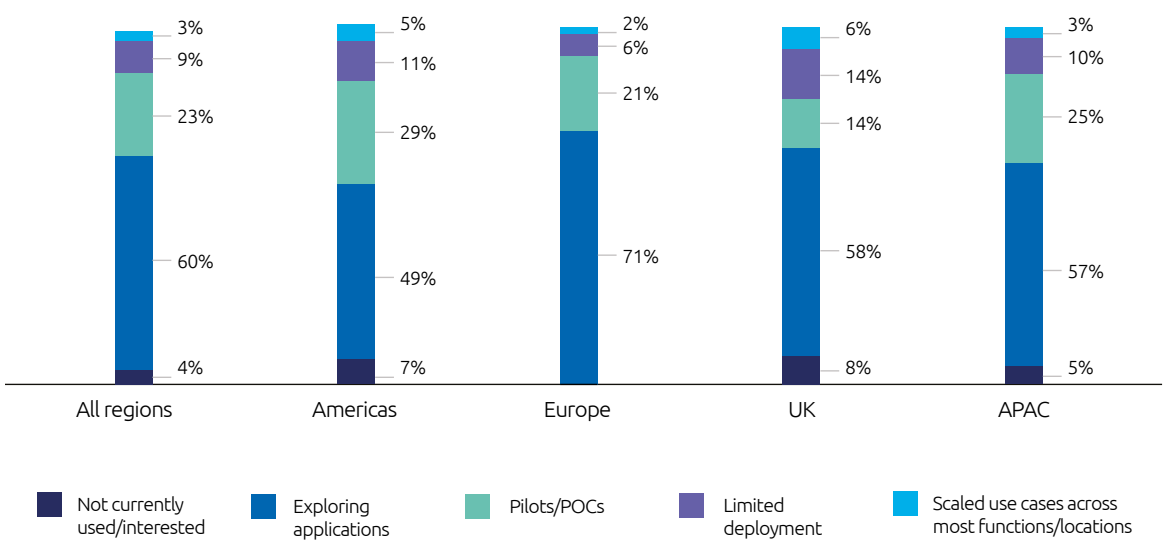
"Generative AI marks a fundamental shift from deterministic systems to technologies that operate with uncertainty and emergence. This is not a simple upgrade but a paradigm change that challenges how leaders think about control, timelines, and outcomes. Success requires resetting expectations, embracing new ways of working, and actively managing resistance as organizations adapt their mindset to this new operating reality."

Robert Engels
Global AI Futures Lab, Capgemini

Agentic AI systems are gaining traction across enterprises

Agentic AI systems span a spectrum—from human-in-the-loop decision support to more advanced agents with limited, task-specific autonomy operating under defined governance guardrails.

Percentage of organizations at each stage of Agentic AI maturity, by region



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

China is ahead of the US and Europe in agentic AI adoption

- 46% of Chinese organizations are piloting or deploying agentic AI, either in limited or extensive ways, compared to 41% in the United States and 30% in Europe. For example, Alibaba International, a China-based digital commerce company has launched three AI agents to streamline complex cross-border e-commerce tasks, dramatically improving merchant efficiency and productivity. Kaifu Zhang, vice president of Alibaba International and Head of its AI Business team, notes, ***"The past year marks a significant shift in how we deploy AI to empower cross-border e-commerce, reflecting broader industry needs and trends. Our approach combines deep, scenario-specific data with continuous learning loops, leading to increasingly powerful problem-solving capabilities. We're evolving beyond standalone generative models toward dedicated AI agents that can tackle a wider range of complex business challenges efficiently for merchants engaged in cross-border trade worldwide."***[28]
- At a global level, 36% of organizations are piloting or using agentic AI (in limited or extensive ways)

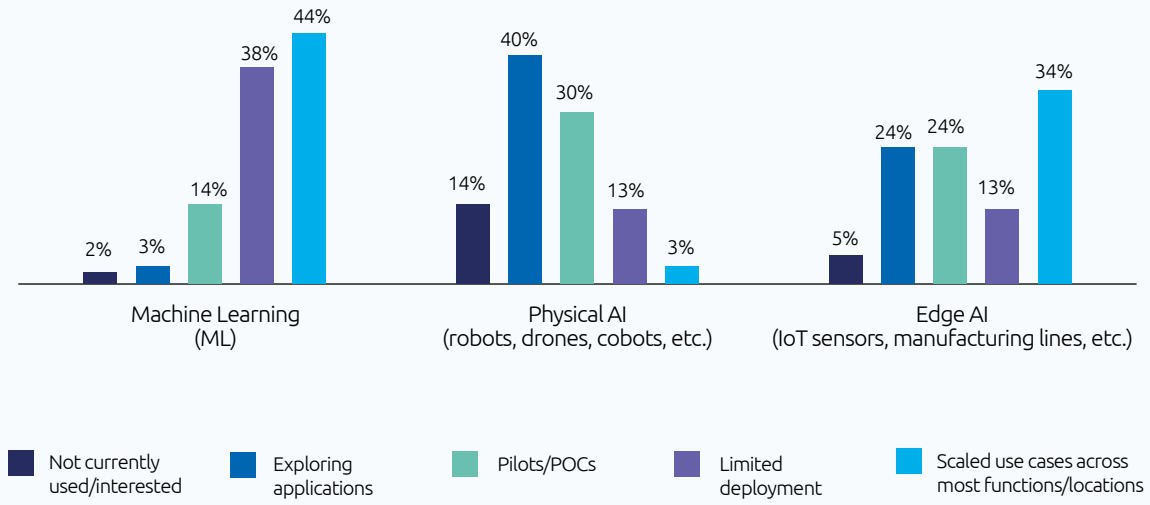
"The reason autonomous and agentic AI will be transformative is because it shifts the users' responsibility from prescribing the solution to simply articulating the problem. The real differentiator ahead will be agent orchestration: the ability to design, govern, and coordinate multiple AI agents as a coherent system, aligning them with business intent to deliver complex outcomes at scale."

Dr. Mark Roberts

Head of Capgemini's Global AI Futures Lab

Edge AI is drawing more interest than ever

Organizational adoption levels across different types of AI



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

Most organizations have progressed significantly in ML and edge AI adoption

More than half (58%) of surveyed organizations say the outcomes from their traditional ML and NLP (Natural Language Processing) implementations have exceeded expectations

Global spending on edge AI is set to top **$260 billion** in 2025 and grow 13.8% a year to reach $380 billion by 2028.[29]

Targeted acquisitions and platform expansion fuel edge AI growth

Qualcomm
× EdgeImpulse

IoT ECOSYSTEM

Strategic value

Enhances developer offerings and expands AI leadership to power AI-enabled products and services across IoT. [30]

Focus area:
Developer platform • AI-enabled IoT products

Nordic
× Neuton.AI

tinyML model generation (~5 KB models)

Strategic value

Gaining IP for tinyML model generation (~5 KB models). Jumpstarts Nordic's strategy for always-on, low-power edge AI deployments.[31]

Focus area:
Focus area: Ultra-low power • always-on edge AI

NXP
× Kinara

$307M | NPU SPECIALIST

Strategic value

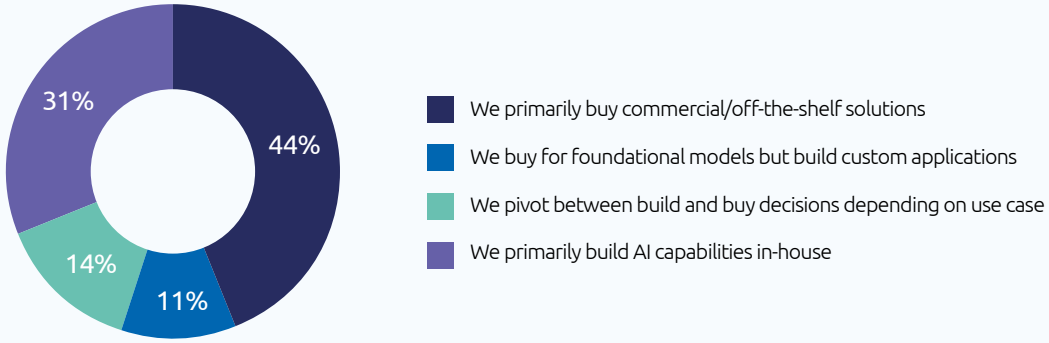
Kinara is a specialist in neural processing units (NPUs). Enhances NXP's portfolio with high-performance, Gen AI-capable edge processors for industrial and automotive use cases.[32]

Focus area:
NPU

Organizations are moving beyond make or buy toward blended AI strategies

The main approach is about building where it differentiates, buying where it accelerates, and orchestrating proprietary value over commodity models.

Organizations' approaches to building AI capabilities



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 806 organizations.

64%

of organizations say they are actively investing in or evaluating small language models (SLMs) or fine-tuned open-source models as alternatives to large proprietary ones

62%

of organizations say they balance open-source and proprietary tools based on risk and scalability

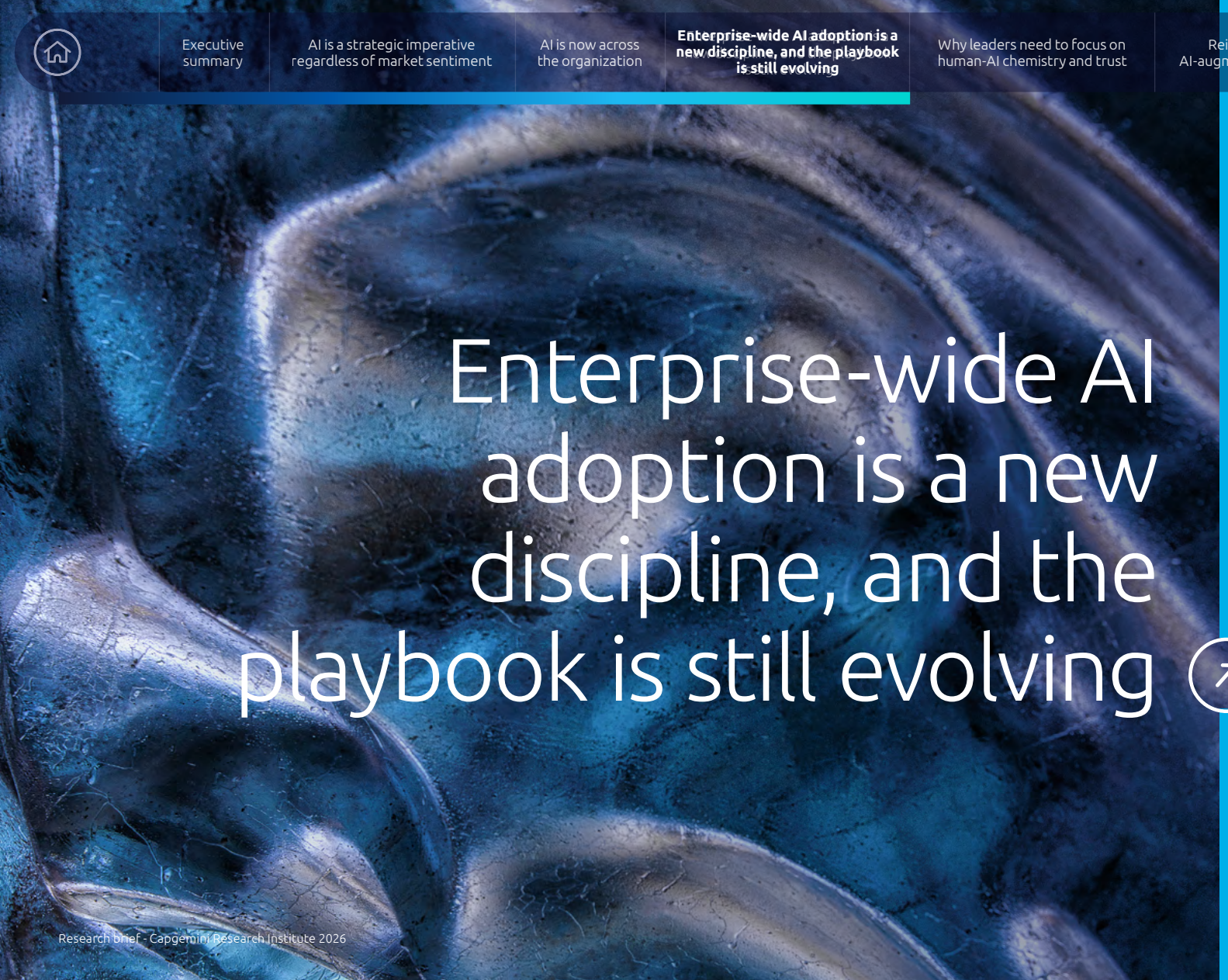
Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations for the first statement and N = 806 organizations for the second statement.

"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."[33]

Nicole Onuta
Head of AI Risk COE, ING

04

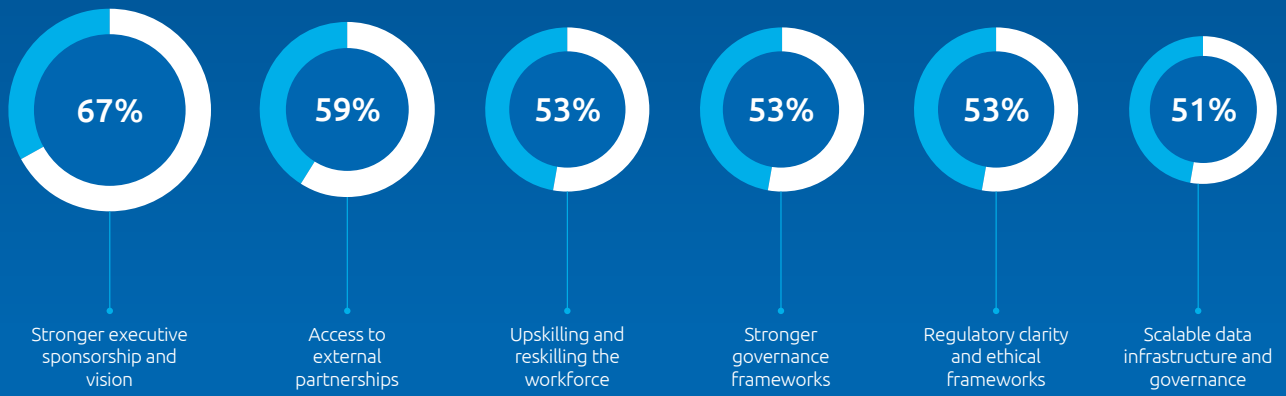
Enterprise-wide AI adoption is a new discipline, and the playbook is still evolving



Organizations are currently exploring different paths for enterprise-wide adoption

Organizations are realizing that enterprise adoption is not just about expanding pilots; it is evolving into a discipline of its own. There is no universally defined approach yet, enterprises are experimenting with different models.

Percentage of organizations highlighting the most effective ways to accelerate AI adoption within their organization or industry:



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

Every AI initiative can be pursued along two paths:

Augment: Embed AI onto existing systems an workflows (e.g., copilots in CRM, AI-assisted quality assurance (QA) processes).

Re-architect: Redesign workflows to be automation-first using agentic systems, with clear guardrails, oversight, and auditability) (e.g., AI-driven case routing with human oversight and automated quality checks).

Why this matters: Scaling beyond pilots often requires more than adding tools. Organizations need fit-for-purpose governance, strong data foundations, and operating models that define decision rights, escalation paths, and accountability so AI can be embedded safely and sustainably.

AI-driven transformation should start with leadership clarity

"AI success is not defined by speed of adoption alone, but by clarity of intent. Organizations that see AI as a multi-year source of advantage take the time to articulate why they are using it, what outcomes they seek, and how humans will work alongside it. Sustainable value comes from investing in the right foundations and building human-AI collaboration as a core capability, not from rushing deployment without strategic alignment."

Pascal Brier
Group Chief Innovation Officer, Capgemini

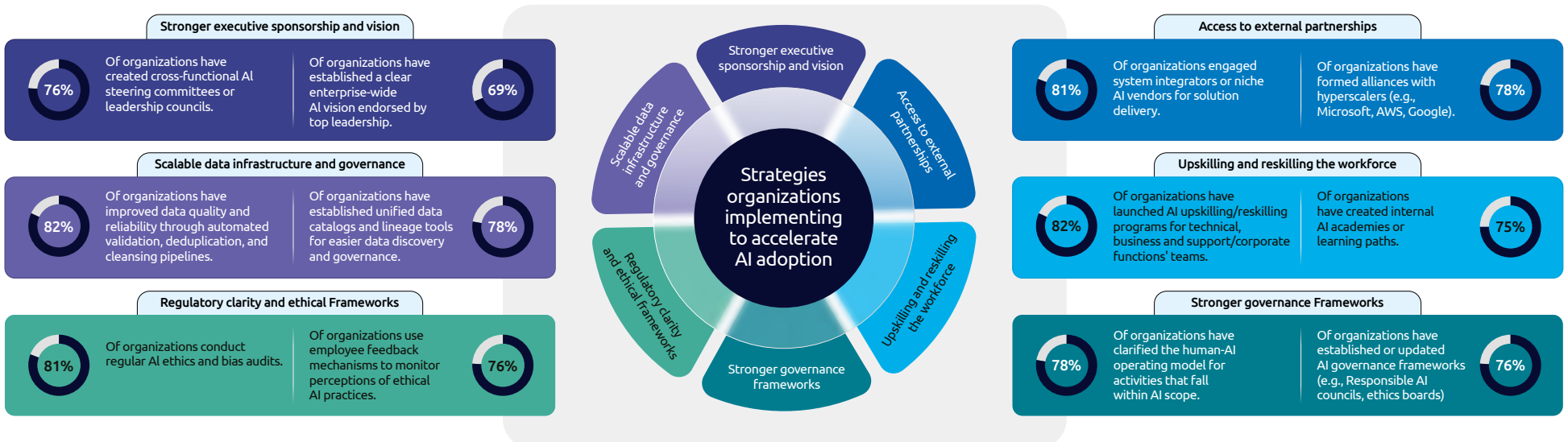
- According to Business Insider, Microsoft is making big organizational changes, including executive reshuffles and pushing teams to work faster and leaner. The goal is to centralize power around AI leaders and transform how products are built and funded ; all driven by the CEO's vision for an AI-first revolution.[34]

- Bank of America's technology division recorded the sharpest percentage jump in managing director promotions in 2025, as the bank pours billions into digital tools aimed at boosting productivity.

- The bank will promote 40 executives in its technology unit to managing directors on January 1, up from 17 last year, the biggest percentage increase among all of the bank's divisions, to lead through the change towards AI and other emerging innovations.[35]

The AI playbook is clear, but achieving enterprise-wide adoption remains an open question

Percentage of organizations deploying the following strategies to accelerate AI adoption

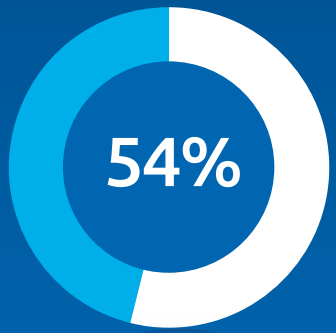


Source: Capgemini Research Institute, AI adoption survey, November 2025, N = organizations that consider the above six ways effective to accelerate AI adoption among the 1505 organizations surveyed.

Note:
- **Stronger governance frameworks** refer to robust governance frameworks that establish clear policies, accountability, and risk controls to ensure AI and data initiatives are ethical, compliant, and transparent. They embed oversight and decision-making structures that safeguard against operational, security, and regulatory risks.
- **Scalable data infrastructure and governance** refers to a technology foundation that can handle growing data volumes while maintaining quality, security, and compliance. It combines high-performance, flexible infrastructure with governance practices that standardize data management and enable AI to scale responsibly.

Data and AI sovereignty is becoming a major consideration amid sweeping macroeconomic and socio-political shifts

Percentage of organizations agreeing to the below statement



of organizations agree that they prioritize data sovereignty, ensuring that sensitive or regulated data remains under their control, even when using external AI models or platforms.

Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

"AI sovereignty goes hand in hand with competitive enhancement. The recent trends leave room to gain competitive advantage at a fast pace, as no country has a moat in AI engineering anymore."[36]

Etienne Grass
Global CAIO, Capgemini Invent

AI sovereignty is moving from policy intent to national execution[37]

South Korea

South Korean President Lee Jae Myung, who assumed office in June, proposed nearly tripling next year's government budget for AI development to approximately $6.8 billion.

The country has set up a roughly $102 billion "National Growth Fund" to drive investments over the next five years in high-tech strategic industries, including AI. Additionally, a new presidential secretary for AI and future planning was created to spearhead public-private efforts.

The country also announced a deal to procure 260,000 of Nvidia's advanced GPUs, positioning the move as a cornerstone for its AI ambitions.

France and Germany

Mistral AI (from France) and SAP (from Germany) teamed up to launch a sovereign AI platform to protect European data in the public sector and regulated industries.

UK

The UK has established a sovereign AI unit to facilitate investments into local startups and position itself as an attractive location for AI firms

India

India is developing its own foundational AI model while expanding domestic computing capacity

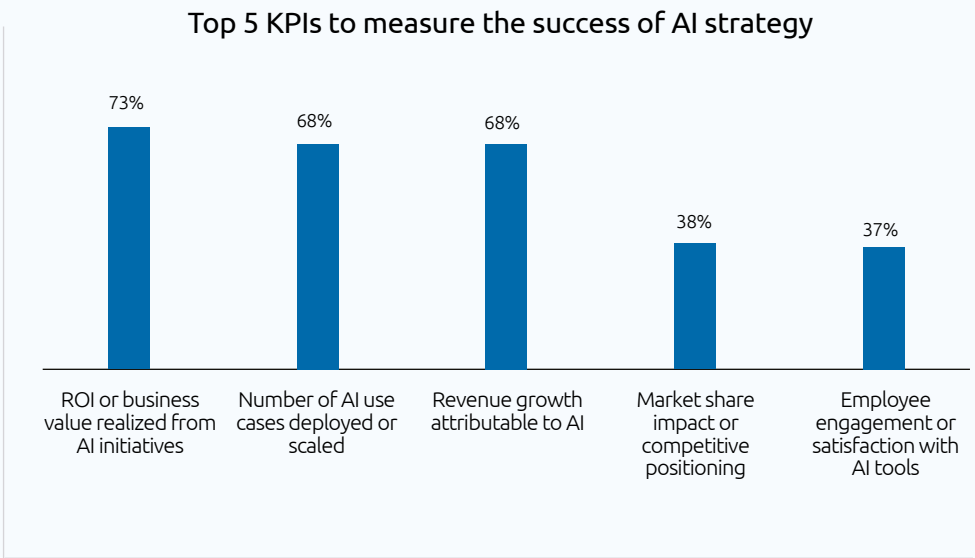
Saudi Arabia and the United Arab Emirates

The two countries recently won approval from the U.S. Commerce Department for two local companies to buy up to 70,000 advanced AI chips

The UAE's minister of economy has emphasized spending on sovereign AI to be as important as areas like defense and cybersecurity.

AI performance is increasingly judged by enterprise outcomes, not just returns

Organizations increasingly see AI as a catalyst for strategic transformation, moving beyond the narrow focus on short-term financial gains.



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

> *"[AI has] significantly reduced false positives - there are fewer times our customers are having to make calls to try to make corrections. It supports enhanced security, cybersecurity, and fraud security for the firm. It also supports a more effective, stable global system overall, to have these tools actually in the public sector on the other side of the table, enabling and supporting banks in that aspect of risk management."*[38]

Terah Lyons

Managing Director and Global Head of AI & Data Policy, JPMorgan Chase

"Leaders are no longer content to run pilots. They want proof. Gen AI is being held to the same standards as other major investments, and that is a sign of increasing maturity."[39]

Sonny Tambe

Professor of Operations, Information and Decisions and Faculty Co-Director at Wharton Human-AI Research

Goldman Sachs has launched One Goldman Sachs 3.0, an initiative leveraging AI to create a more efficient centralized operating to drive growth.

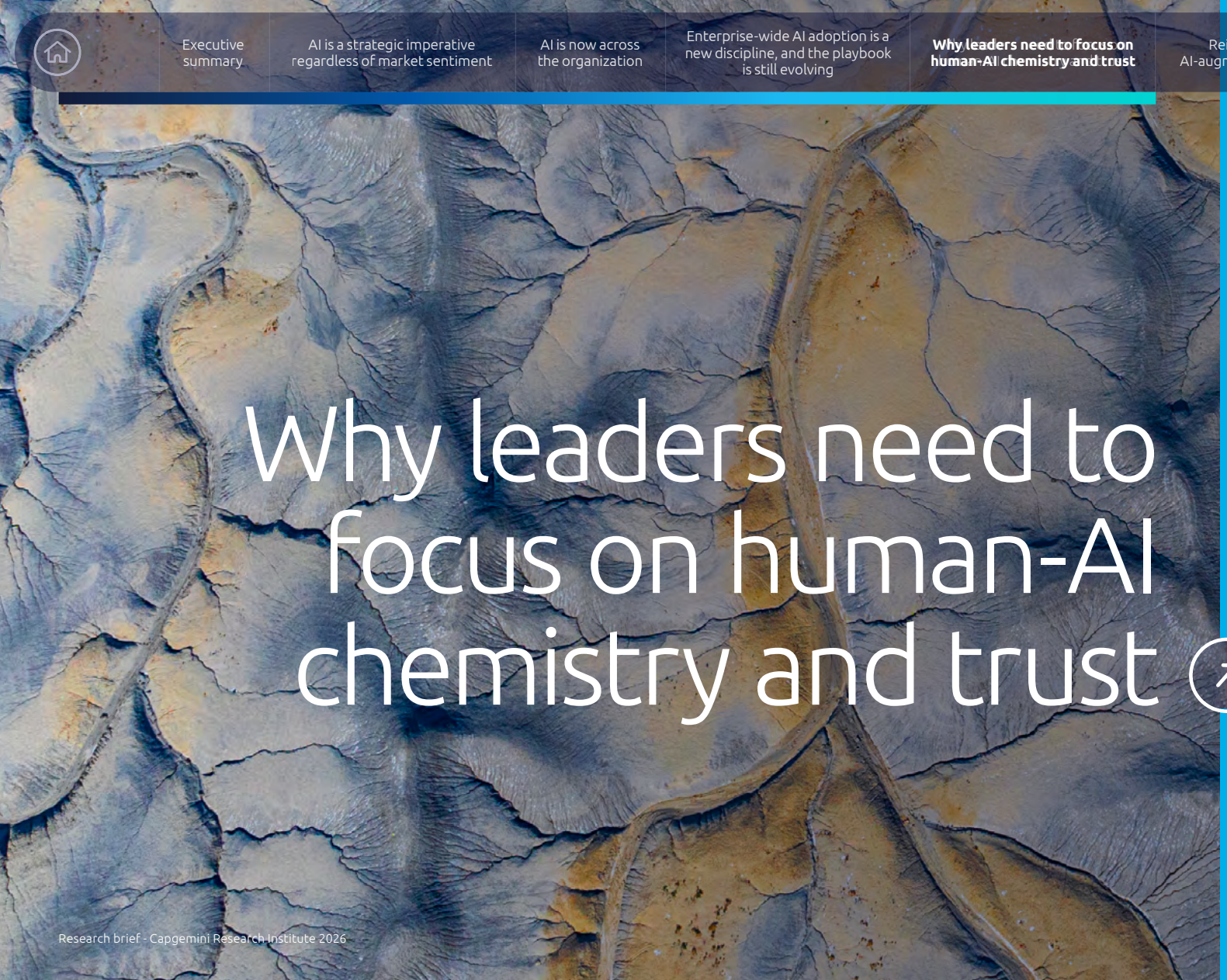
"This is a multiyear effort that we will build over time, and we plan to measure our progress across 6 goals: enhancing client experience, improving profitability, driving productivity and efficiency, strengthening resilience and capacity to scale, enriching the employee experience and bolstering risk management" [40]

David Solomon

CEO, Goldman Sachs

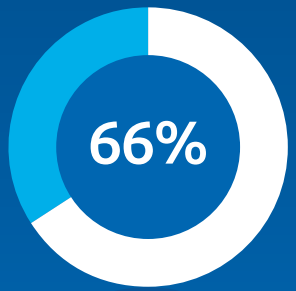
05

Why leaders need to focus on human-AI chemistry and trust

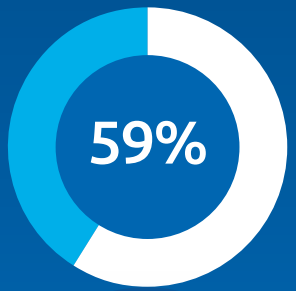


Human-AI collaboration has improved productivity and decision-making

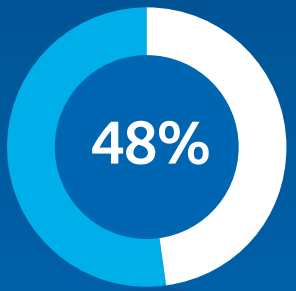
Human–AI chemistry refers to designing AI systems where humans retain control over critical decisions, guide AI behavior, and intervene when needed–ensuring accountability as AI takes on a greater scope.



of organizations report that human-AI collaboration has led to measurable improvements in productivity and decision quality.



of organizations say their employees feel empowered to use AI in their day-to-day work.



of organizations highlight that their organization has clearly defined roles and responsibilities for humans and AI systems to work together effectively.

Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

Human-AI collaboration has already improved productivity and decision-making, yet trust must be strengthened to unlock full potential. Employees need clarity on how AI decisions are made, where accountability lies, and how risks are managed. Without this, adoption stalls, even when technology is ready.

Organizations are realizing tangible benefits as AI moves from assistance to collaboration

AI is shifting from a simple enabler to a strategic ally embedded in processes, driving efficiency, and unlocking better results

Leadership perspective

"As AI takes over routine governance tasks, humans will focus on meta-governance: designing the policies, reviewing exceptions, and guiding the AI. It's a shift from doing the work to overseeing the work. And because AI can give more visibility into processes than we've ever had (through logs, analytics, etc.), we might actually get more transparency and accuracy."[41]

Mike Crisafulli, SVP and CIO, Connectivity & Platforms at Comcast

The opportunity

The majority of organizations still lack formal frameworks, presenting a significant opportunity to strengthen human–AI integration for greater efficiency and trust.

Expert insight

"For many jobs, AI will only automate or augment 20-30% of tasks. So, there's a huge productivity boost, but people are still required for the remaining 70% of the role."[43]

Andrew Ng, Founder of LandingAI and Managing General Partner, AI Fund

JPMorgan

COiN PLATFORM

AI can be used to assist in supporting decision-making or repetitive tasks. For example, JPMorgan uses an AI platform, COiN to save itself 360,000 legal work hours per year by automating the review of complex documents.[42]

360,000 | LEGAL WORK HOURS SAVED PER YEAR

Walmart

CODING TOOLS

"For developers on our tech team, we now have new coding assistance and completion tools that are helping streamline deployments and deliver code faster with fewer bugs. Last year, these tools helped us save about 4 million developer hours. This year, we plan to make these tools available to all developers in North America and India."[44]

C. Douglas McMillon, President, Chief Executive Officer & Director at Walmart, Inc.

4 million | DEVELOPER HOURS SAVED

Enterprises across sectors are already unlocking value through human-AI collaboration

Customer experience

AI AS INTERFACE

Bank of America

SOLUTION

Erica, an AI-powered assistant, uses NLP to deliver human-like responses and support internal tasks

IMPACT METRICS

50M+ users
3B+ client interactions, averaging more than 58mn/month

90%
adoption

50% reduction in IT service desk calls[45]

Operational efficiency

AI AS ACCELERATOR

AT&T

Ask AT&T, a Gen AI platform on Microsoft Azure, helps employees with repetitive tasks like investigation and debugging.

33% faster

Saves millions annually[46]

Schaeffler/ThyssenKrupp

Gen AI powered assistant to streamline processes, tackle labor shortages, and boost innovation.

Takes **30s** for panel visualizations

20% adaptation needed by generated codes.[47]

Bridges skills gaps - employees interact directly with machines.[48]

Clinical intelligence

AI AS ADVISOR

MedINT

A healthcare technology company that leverages advanced AI and human expertise to provide precise, up-to-date medical insights for doctors and medical professionals

SOLUTION

Human-in-the-loop medical AI platform for complex clinical decision-making

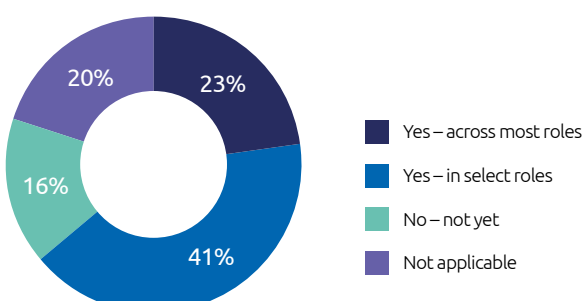
Clinicians retain full control

Patient-specific evidence without replacing clinical judgement.[49]

Organizations must focus on reskilling and new capability building to enable the human-AI chemistry

Organizations are shaping a culture that goes beyond training, reimagining the future of work and driving a cultural revolution

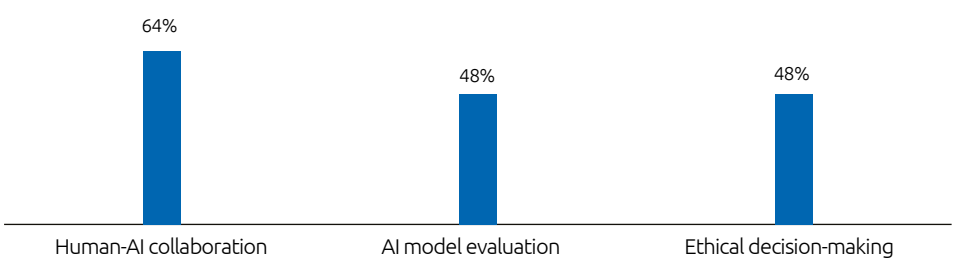
Beyond AI literacy, is your organization redefining traditional skillsets to align with AI adoption?



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 107 HR function respondents across organizations.

Organizations are cultivating capabilities that foster human – AI synergy, paving the way for an agentic future

Percentage of respondents identifying skills that are being redefined or newly emphasized in their organizations owing to the implementation of AI



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 69 respondents from HR functions in organizations that have begun redefining traditional skill sets to align with AI adoption.

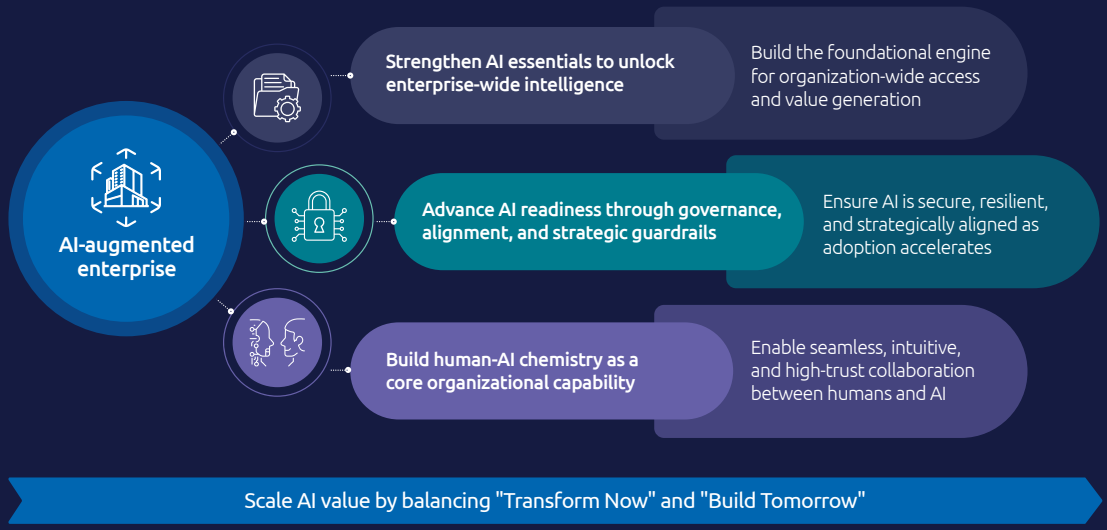
06

Reimagining the AI-augmented enterprise

Reimagining the AI-augmented enterprise

As AI moves from experimentation to enterprise-scale deployment, organizations face a new challenge: translating rapid advances in AI capabilities into sustained business impact. This shift requires leaders to rethink how intelligence is embedded across the organization, from core operations and decision-making to governance, talent, and technology foundations. Success depends not only on deploying AI, but on building the capabilities, guardrails, and ways of working that allow AI to scale responsibly and deliver value over time.

Based on our global survey of executives, and analysis, this recommendation framework outlines the key priorities organizations must address to become AI-augmented enterprises. It highlights how leaders can strengthen AI fundamentals, advance readiness through governance and alignment, foster effective human–AI collaboration, and balance near-term transformation with long-term innovation to unlock enterprise-wide intelligence.



Source: Capgemini Research Institute analysis.

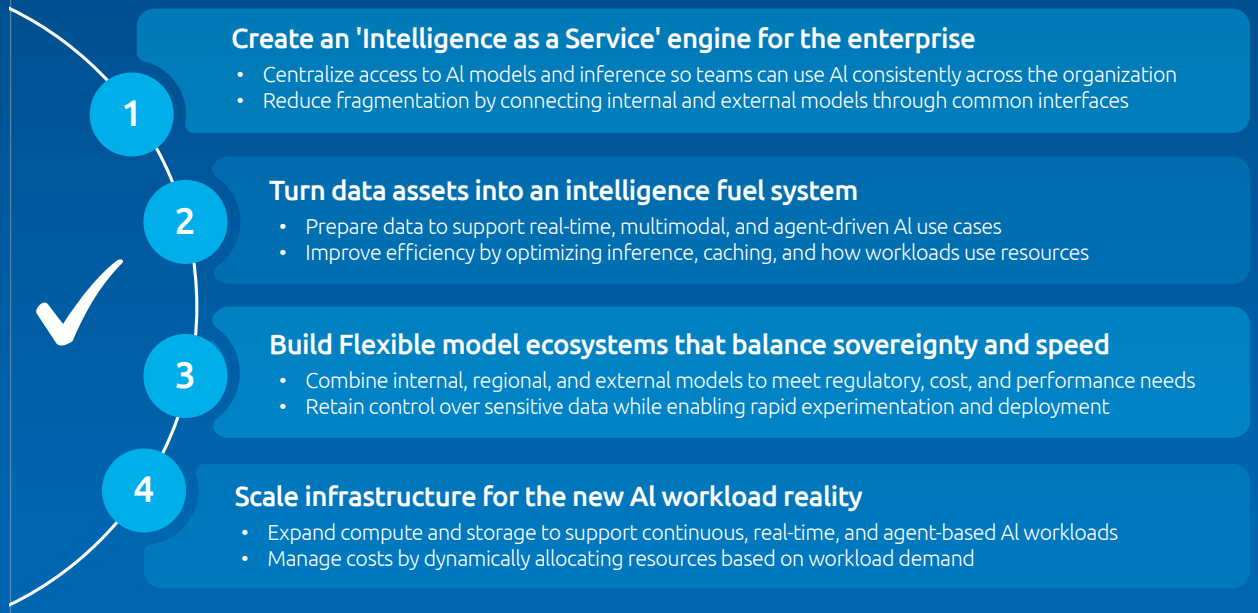
> ***"As AI becomes integral to business operations, organizations should establish dedicated AI centers of excellence (COEs) led by C-suite executives. These COEs should be staffed by a diverse team of AI specialists, domain experts, and program managers. The key is to deploy a lean, cross-functional team that can create and enforce guidelines for AI tool usage, data governance, and risk-management frameworks"***[50]
>
> **Valentin Marguet**
> Powertrain project lead at an automotive firm

"The biggest challenge is setting guardrails and deploying them consistently across our organization. Another major challenge is the lack of standardized language across the insurance industry. Terminology can vary significantly between companies and even departments, making it difficult for AI agents to interpret intent accurately. Agents must be adaptable, but there must also be clear triggers for human intervention."[51]

Preetha Sekharan

Former VP, Digital Incubator (Applied AI and Transformation), Unum, an American insurer

Strengthen AI essentials to unlock enterprise-wide intelligence



1

Create an 'Intelligence as a Service' engine for the enterprise

- Centralize access to AI models and inference so teams can use AI consistently across the organization
- Reduce fragmentation by connecting internal and external models through common interfaces

2

Turn data assets into an intelligence fuel system

- Prepare data to support real-time, multimodal, and agent-driven AI use cases
- Improve efficiency by optimizing inference, caching, and how workloads use resources

3

Build Flexible model ecosystems that balance sovereignty and speed

- Combine internal, regional, and external models to meet regulatory, cost, and performance needs
- Retain control over sensitive data while enabling rapid experimentation and deployment

4

Scale infrastructure for the new AI workload reality

- Expand compute and storage to support continuous, real-time, and agent-based AI workloads
- Manage costs by dynamically allocating resources based on workload demand

Microsoft is investing $80 billion into building and expanding AI-optimized data centers through 2028.

At the center of this expansion is Microsoft's aggressive bet on multimodal AI, sovereign cloud, Copilot at scale, and a redefined version of enterprise productivity powered by custom silicon and tightly integrated infrastructure.[52]

Source: Capgemini Research Institute analysiss.

Advance AI readiness through governance, alignment, and strategic guardrails

01 Build AI strategy on CEO-led priorities and enterprise goals

- Clarify where AI should drive efficiency today versus long-term transformation
- Focus leadership attention on use cases that mater most to the business

02 Install a multi-tiered governance model aligned to autonomy levels

- Set clear rules for when humans guide decisions and when AI can act independently
- Define who owns decisions, when humans step in, and how exceptions are handled

03 Protect digital sovereignty and resilience in hybrid environments

- Maintain control over data, models, and decisions across vendors and clouds
- Build security into AI systems to support real-time and distributed operations

04 Institutionalize readiness through shared playbooks and scale pathways

- Standardize how teams experiment, deploy, and manage AI over time
- Embed clear guardrails for reliability, transparency, and risk management

Source: Capgemini Research Institute analysis.

Readiness accelerates when leadership, governance, and operating models move in sync

Leadership perspective

Exponential growth mindset

"Many companies use AI as a patch for productivity, rather than fundamentally reinventing their organizations to be AI-native, limiting the impact to incremental gains, rather than exponential transformation."[53]

François Renard, ex-global CMO at Renault

Governance imperative

"Governance is one of those mission-critical areas. Machines simply can't govern themselves, AI is like any other enterprise asset–it needs to be cataloged, tracked, supervised and secured."[54]

William R. McDermott, Chairman & CEO at ServiceNow

Scientific collaboration

"Lilly is shifting from using AI as a tool to embracing it as a scientific collaborator. By embedding intelligence into every layer of our workflows, we're opening the door to a new kind of enterprise: one that learns, adapts and improves with every data point. This isn't just about speed, but rather interrogating biology at scale, deepening our understanding of disease and translating that knowledge into meaningful advances for people served by Lilly medicines as well as the broader life sciences ecosystem."[56]

Thomas Fuchs, Senior Vice President and Chief AI Officer at Lilly

Implementation example

Coca-Cola

Digital council

Governance structure

Coca-Cola has a digital council chaired by John Murphy, President and CFO, and includes key C-suite leaders such as Manuel Arroyo (CMO) and Neeraj Tolmare (CIO) to ensure the right mix of perspectives for AI and digital investments. [55]

Strategic priorities

- **Consumer**
- **Customers** including the bottlers and retailers that Coca-Cola works with
- **Corporate employees** how technology can improve work for corporate employees

Build human-AI chemistry as a core organizational capability

1

Redesign workflows around human AI teaming

- Redefine roles so AI supports work while humans retain control over decisions
- Let AI handle repetitive patterns and escalate complex judgment to people

2

Develop hybrid skills that amplify human potential in AI-driven environments

- Build skills to work effectively with AI, including prompting and oversight
- Train teams to know when to trust AI and when to intervene

3

Build behavioral trust through transparent and explainable AI

- Ensure AI behaves predictably across situations to reduce friction
- Make AI decisions understandable and auditable for users

Source: Capgemini Research Institute analysis.

Enterprises need to shift from task execution to cognitive agility and AI orchestration

Human–AI chemistry is becoming one of the defining challenges in enterprise-wide adoption. Keeping humans "in the loop" is no longer enough.

As AI becomes embedded across workflows and decisions, organizations must enable employees to supervise, challenge, and direct AI systems, not just use them. This shift cannot be addressed through reskilling alone. Employees need the confidence and authority to intervene in AI-driven processes and take accountability for outcomes.

> ***"Organizations aren't just creating a reskilled workforce, they are building an empowered one. This is a fundamental shift, and assuming it can be solved with training alone misses the challenge. The future demands a new human–AI chemistry. Organizations must reinvent what work means, moving beyond human-in-the-loop to human-on-the-loop and ultimately human-in-the-lead. It's not about teaching employees to chat with AI; it's about enabling them to orchestrate fleets of AI agents."***

Bora Ger
Global AI Upskilling Lead, Capgemini Invent

The practical challenge now is helping engineers and managers move from hands-on execution and direct oversight to roles centered on judgment, supervision, and orchestration in AI-enabled environments.

Two complementary approaches are emerging:

- **Structured academy programs and experiential learning** that transition employees from task execution to overseeing AI-enabled workflows.
- **Broader capability development beyond technical skills**, building adaptability, critical thinking, and design judgment for AI-driven operating models.

"We have structured academy programs that take employees through a step-by-step journey, starting with the basics and progressing to more advanced AI use cases."[57]

Anna Kopp
Digital Lead Germany at Microsoft

AI delivers value when organizations redesign roles, skills, and decision authority around people

Job transformation

Every role will evolve

"It's very clear that AI is going to change literally every job. Our goal is to create the opportunity for everybody to make it to the other side. Some jobs and tasks at Walmart will be eliminated, but others will be added."[58]

Doug McMillon, CEO at Walmart

Risk & governance

Security and transparency

"We are embedding the appropriate risk controls and governance frameworks into our broader planning to keep our customer data safe and ensure transparency of any AI decisions."[59]

Andrew Francis Irvine,
MD, Group CEO & Director at National Australia Bank

Citi Group

AI training program

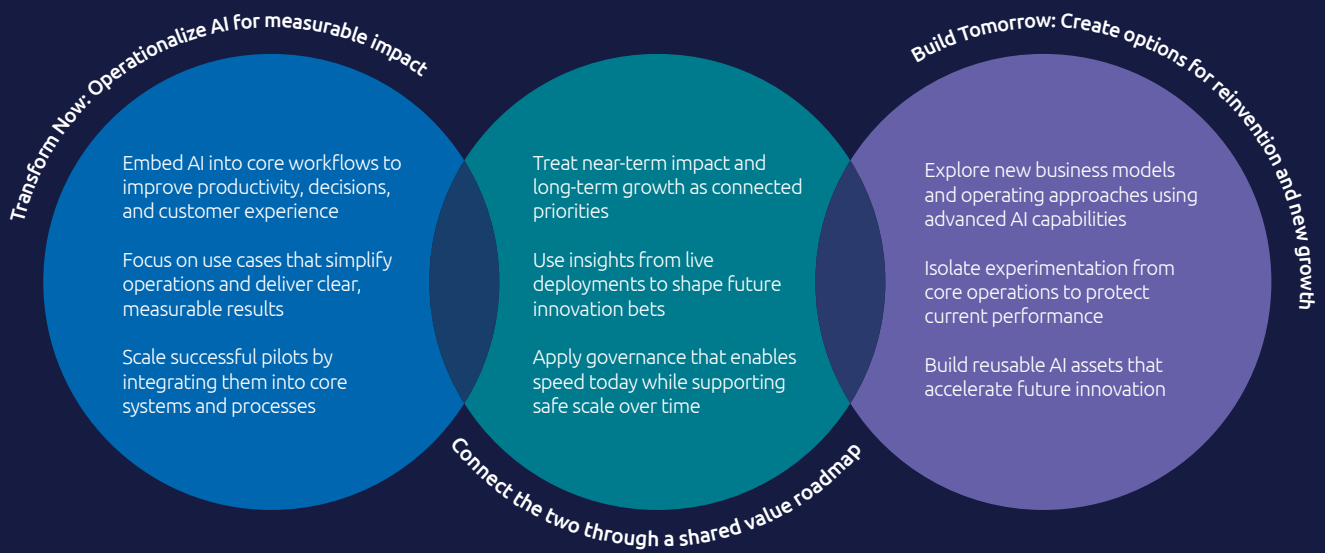
Initiative overview

Citi Group launched an AI training program aimed at teaching hundreds of thousands of employees how to write better prompts to feed the bank's generative AI programs.[60]

Prompt engineering

Core skill development

Scale AI value by balancing "Transform Now" and "Build Tomorrow"



Source: Capgemini Research Institute analysiss.

> ***"Investing in AI and tools to drive efficiency is important, but it's not the definitive solution. Real progress comes from clarity of purpose and a disciplined focus on how to achieve it."***[61]

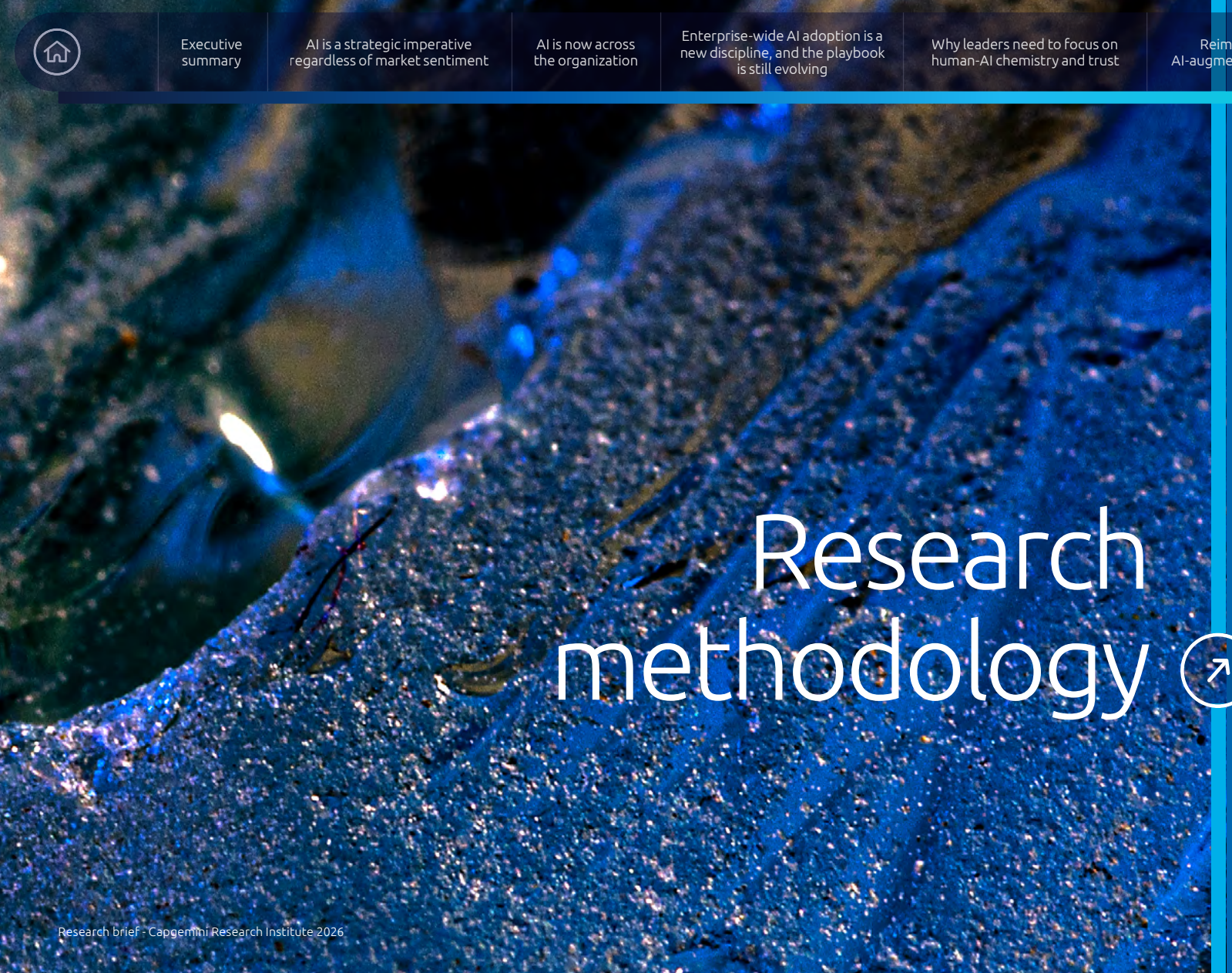
Katherine-Margaux Longest
AVP Digital, Naturium, a US skin-care brand

"For the first time in modern enterprise IT history, technology is moving faster than adoption can follow. Strategies can no longer be static, they must evolve continuously. What you design today will need rewriting tomorrow as new models, infrastructures, and paradigms emerge. Flexibility isn't optional; it's the foundation for thriving in a world of relentless innovation."

Marek Sowa

Senior Director, Global Head of Generative Technologies, Capgemini Business Services

07

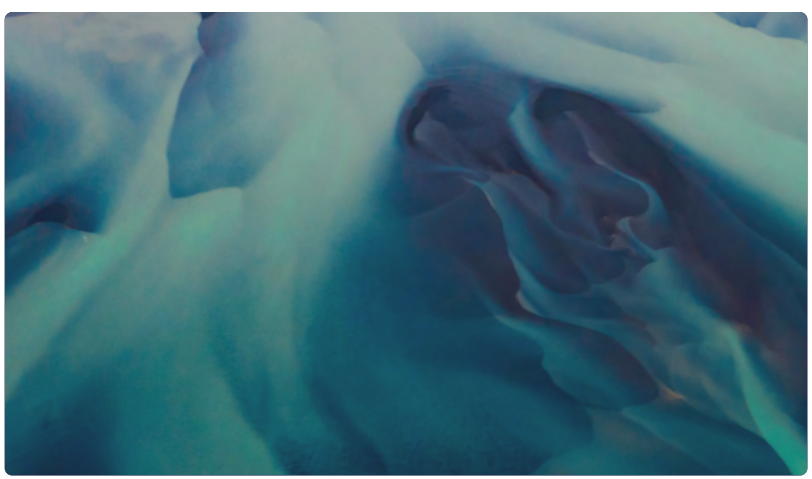


Research methodology

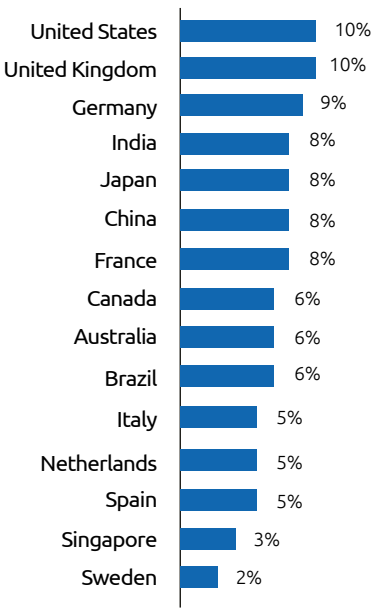
Research methodology

In November 2025, we surveyed 1,505 executives at organizations with more than $1 billion in annual revenue across 15 industries in North America, Europe, APAC, and Latin America. All these organizations have already deployed AI at limited or full scale. Executives surveyed were director-level and above. The distribution of executives and their organizations is provided in the following figures.

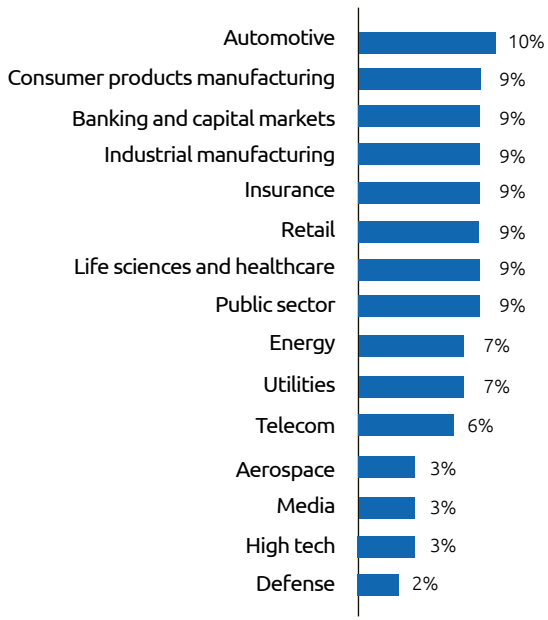
The study findings reflect the views of the respondents to our online questionnaire for this research and are intended to provide directional guidance. Please contact one of the Capgemini experts listed at the end of the report to discuss specific implications.



Organizations by headquarter location



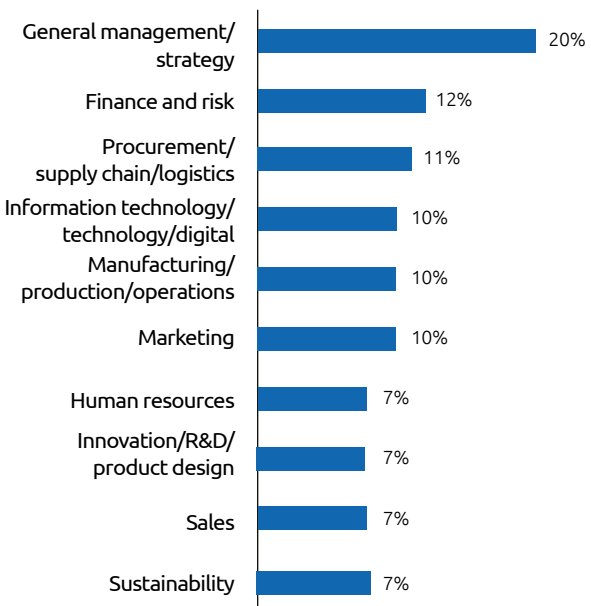
Executives by industry



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

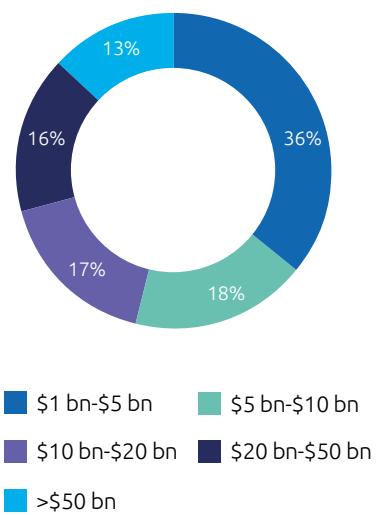
Research methodology

Executives by department/function



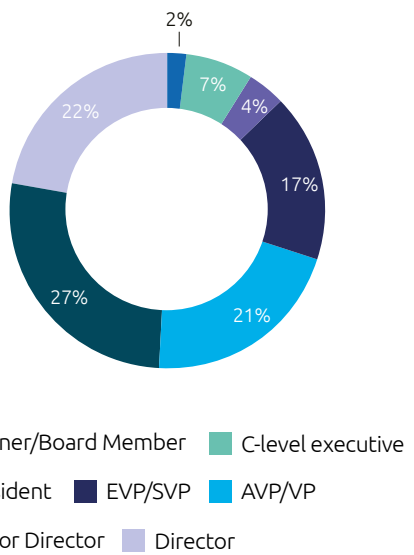
Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

Organizations by annual revenue



Source: Capgemini Research Institute, AI adoption survey, November 2025, N = 1,505 organizations.

Respondent by current job role/title



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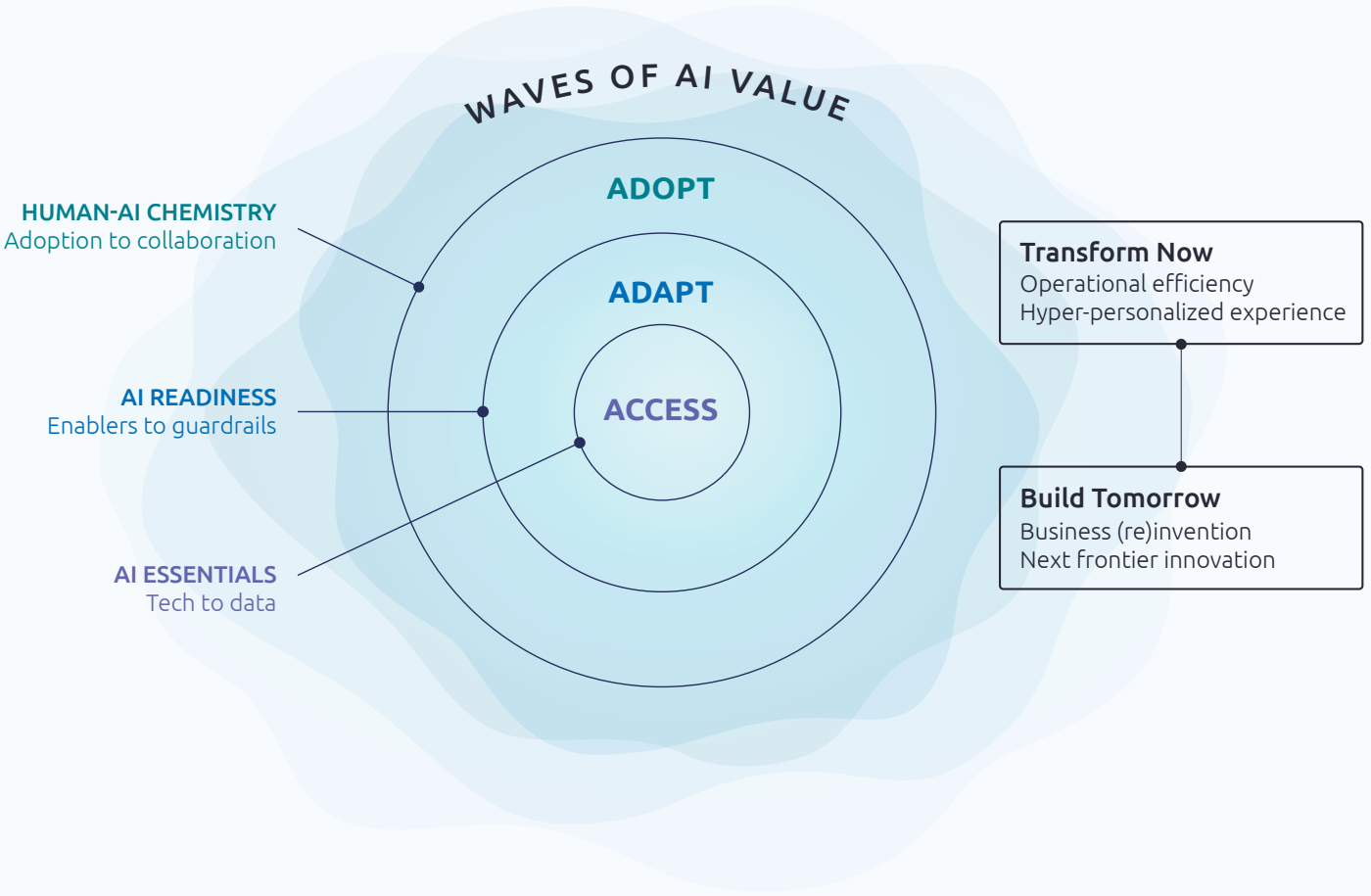
Resonance AI Framework by Capgemini

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



AI essentials

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

AI-readiness

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

Human-AI chemistry

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

Waves of value

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

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

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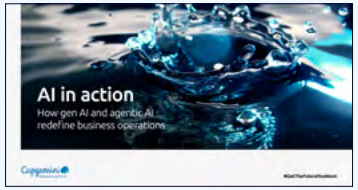

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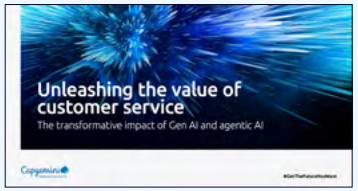

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