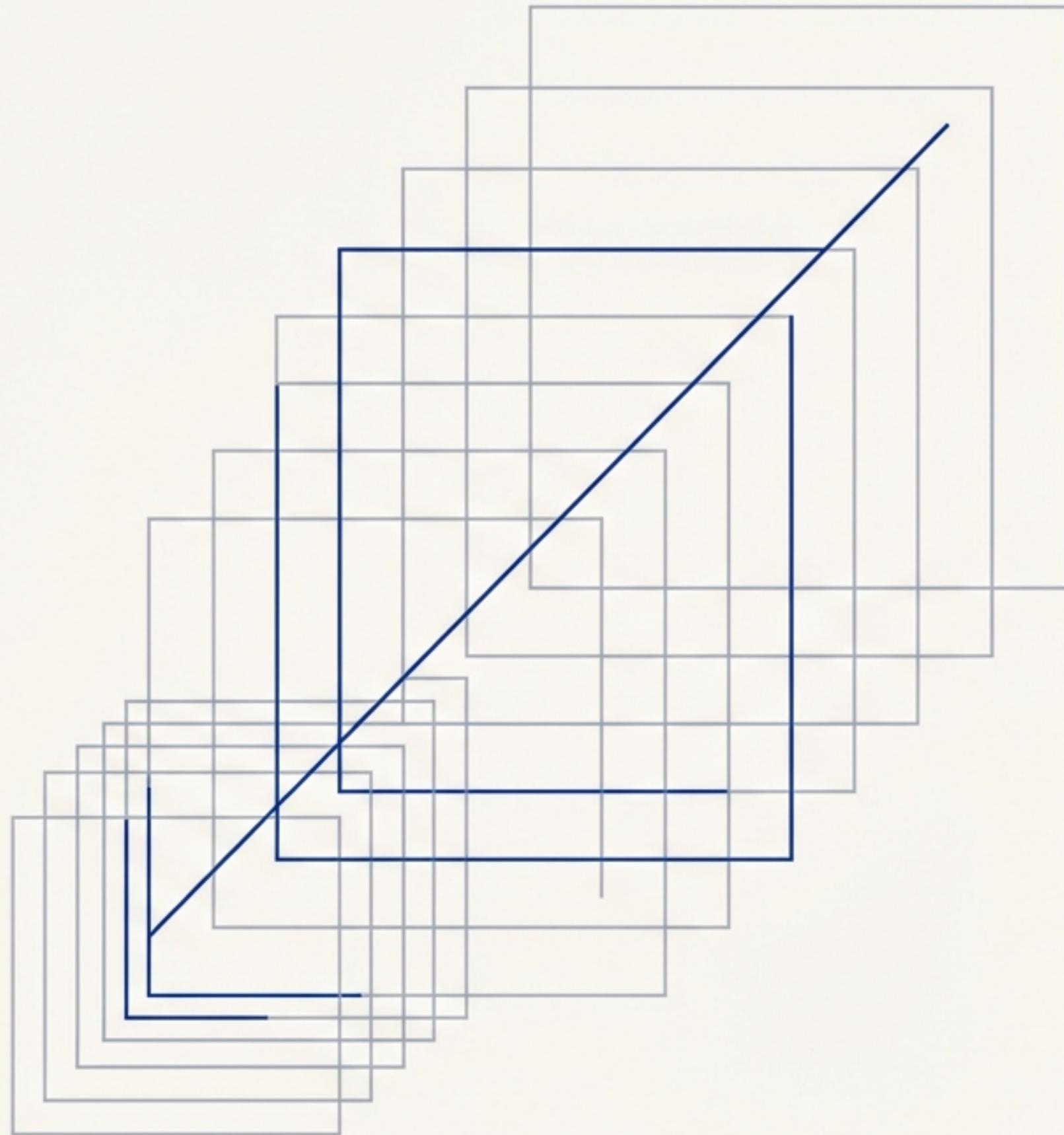


# From Compliance to Competitive Edge: The New Economics of Responsible AI

Key findings from PwC's 2025  
Responsible AI Survey



# Responsible AI has become a primary driver of business value.

The conversation around Responsible AI has shifted from risk mitigation to value creation. Business leaders now see a direct link between mature RAI practices and tangible business outcomes. This is no longer just about doing the right thing; it's about creating a sustainable competitive advantage.

**58%**

report that RAI improves return on investment and organizational efficiency.



**55%**

state that RAI enhances both customer experience and innovation.



# The benefits extend beyond ROI, strengthening trust and security.

## Business Outcomes Enabled by Responsible AI



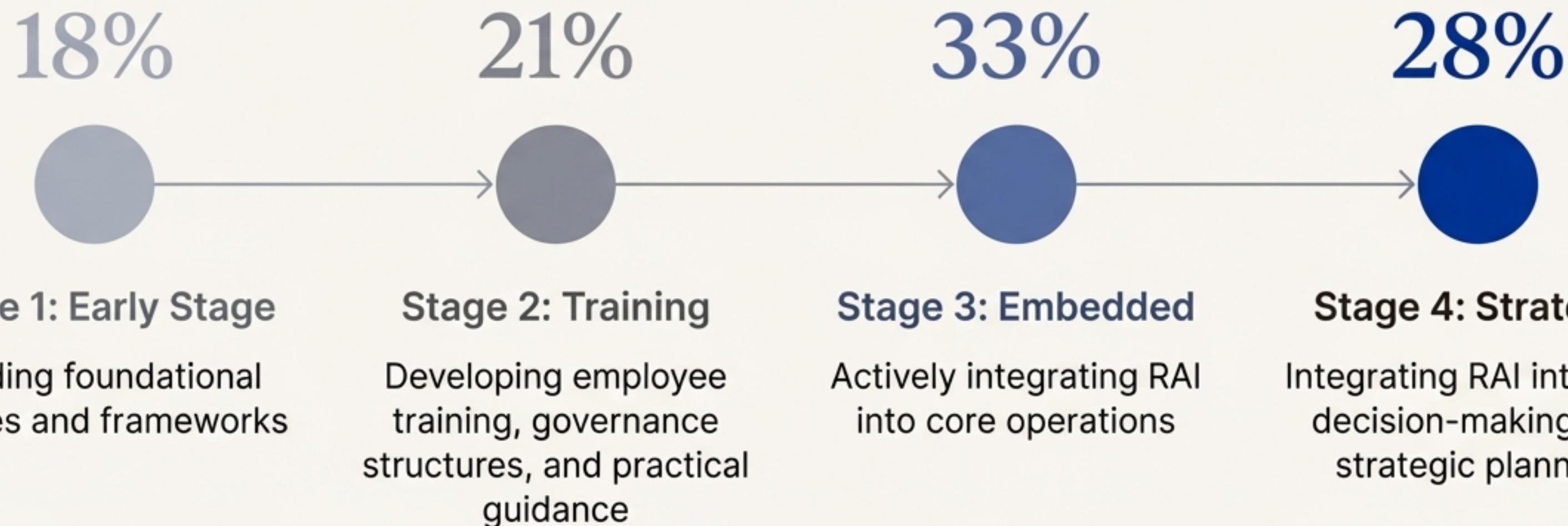
Q: What do you think are the biggest benefits organizations can gain from responsible AI and AI governance practices? Base: 310 business leaders.  
Source: PwC's 2025 US Responsible AI Survey.

“Organizations investing in Responsible AI are realizing measurable returns—in innovation, performance, and trust.”

PwC’s 2025 Responsible AI Survey

# Organizations are on a clear journey, but they are progressing at different speeds.

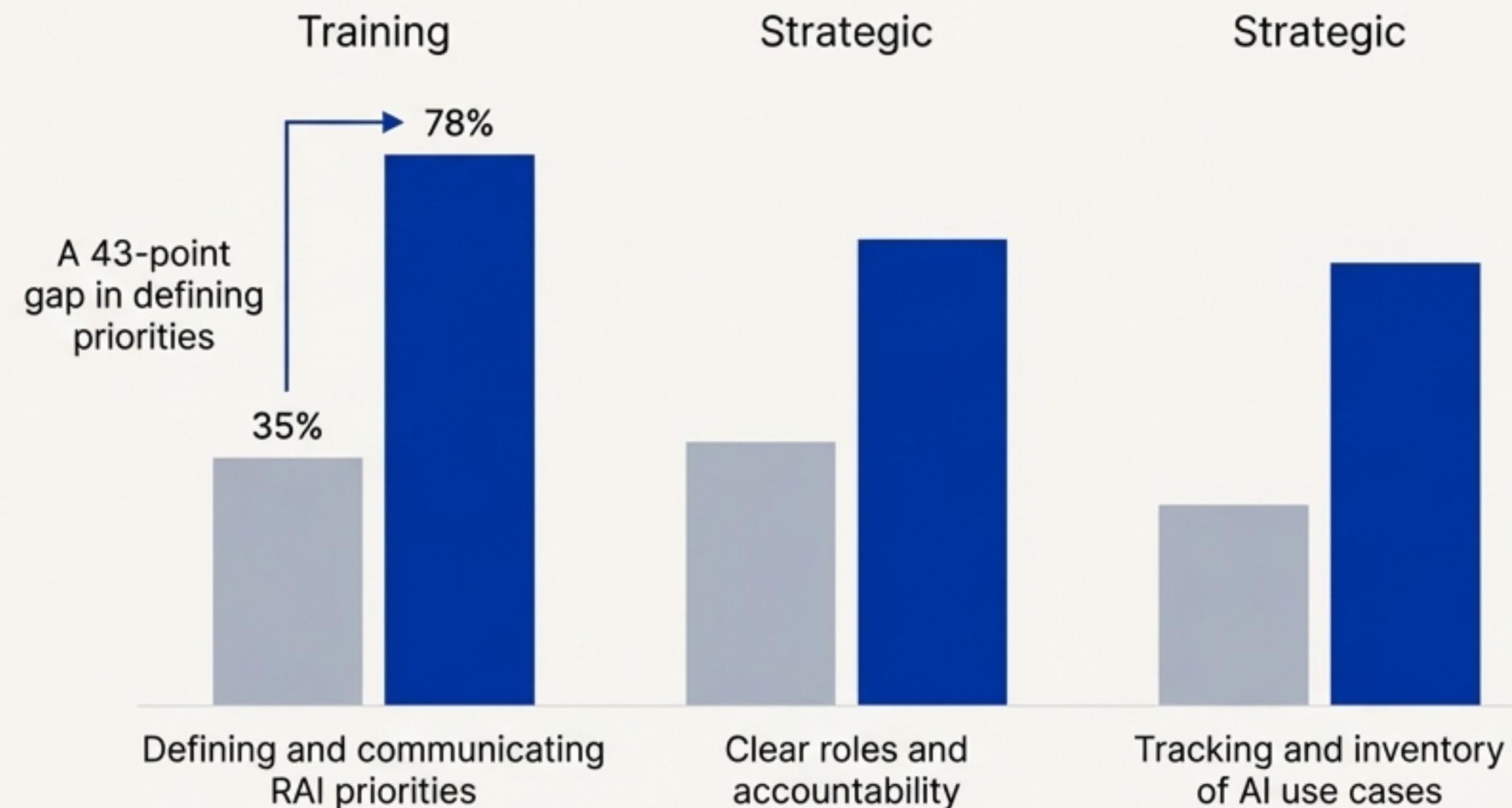
Our survey reveals a spectrum of RAI maturity. While most organizations have moved beyond foundational policies, there is a significant gap between early-stage programs and those that are fully embedded into the business.



# As programs mature, their effectiveness increases dramatically.

**Effectiveness of Key RAI Practices by Maturity Stage**  
(‘Very Effective’ responses)

‘Strategic’ stage organizations are 1.5 to 2 times more likely to rate their RAI capabilities as effective compared to those in the ‘Training’ stage.



# The primary barrier is no longer policy, but scaling principles into practice.

With foundational policies largely in place, the focus has shifted to execution.

Leaders report that the biggest challenge is translating well-intentioned principles into repeatable, scalable processes across the entire organization. Half of all respondents cited this as their biggest hurdle.

## Top Barriers to Operationalizing Responsible AI

Difficulty translating principles into scaled and operational processes

Cultural resistance to change

Limited budget or resources

Lack of tools or technical enablers

Lack of clarity on ownership

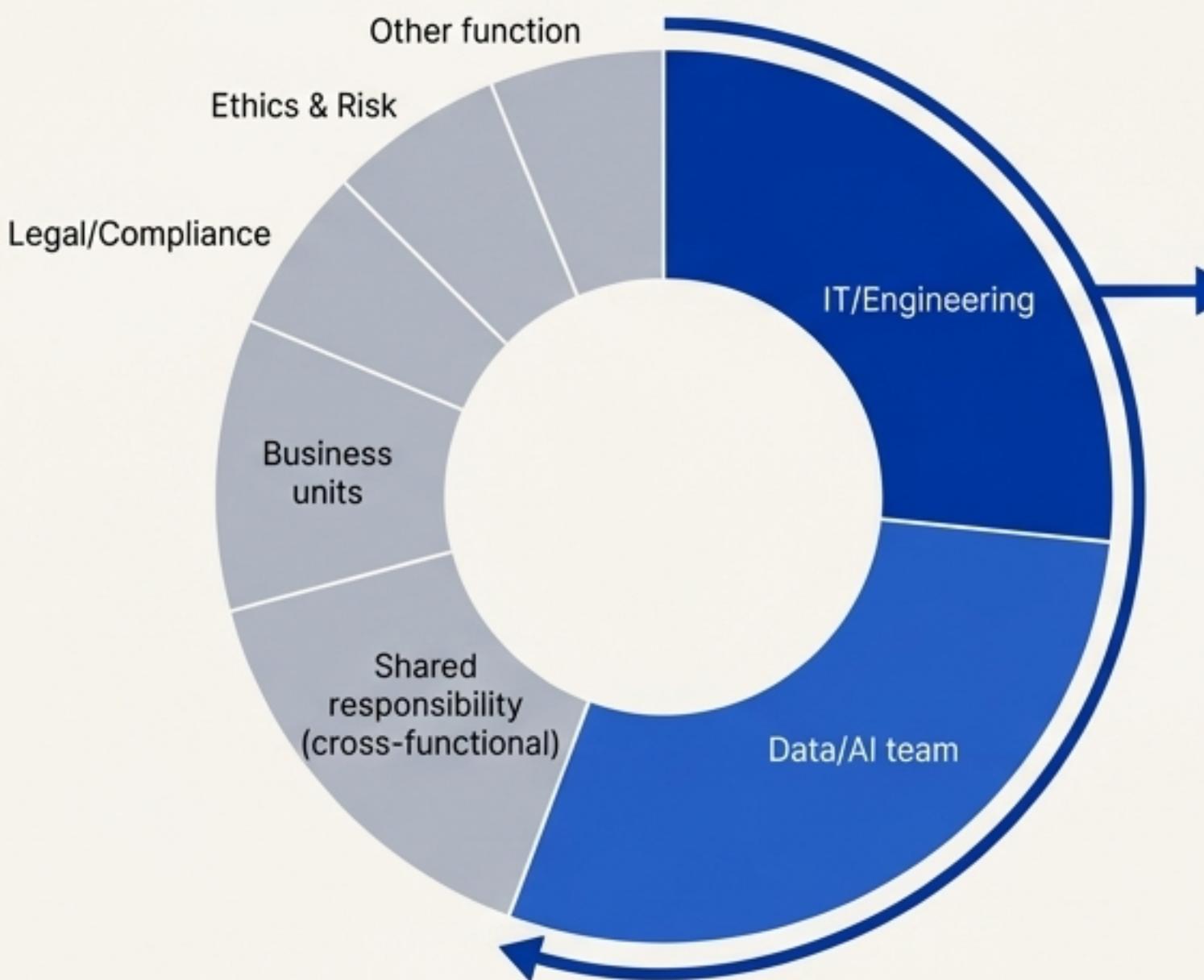
Limited executive sponsorship



# Mature organizations solve for scale by shifting ownership to the front lines.

Governance is moving from centralized committees to the teams building and deploying AI. 56% of executives report that their first-line teams—IT, engineering, data, and AI—now lead RAI efforts. This shift embeds responsibility where decisions are made, transforming governance from a compliance check to a quality enabler.

**Primary Responsibility for Responsible AI**



**56% of RAI efforts are now led by first-line technical teams.**

56% of RAI efforts are now led by first-line technical teams. No technical teams executives report that companies in data, engineering, and AI—now lead efforts. This marks a shift where now lead RAI compliances are made, responsibility governance from a quality enabler.

# The ‘Three Lines of Defense’ model enables speed and trust at scale.

This structure clarifies roles and ensures tight hand-offs between technical and risk teams, allowing organizations to scale AI confidently and safely.



## FIRST LINE

### Build & Operate

IT, Engineering, Data, and AI teams build and operate AI responsibly.



## SECOND LINE

### Review & Govern

Risk, Compliance, and specialized RAI teams review and govern, setting standards and providing oversight.

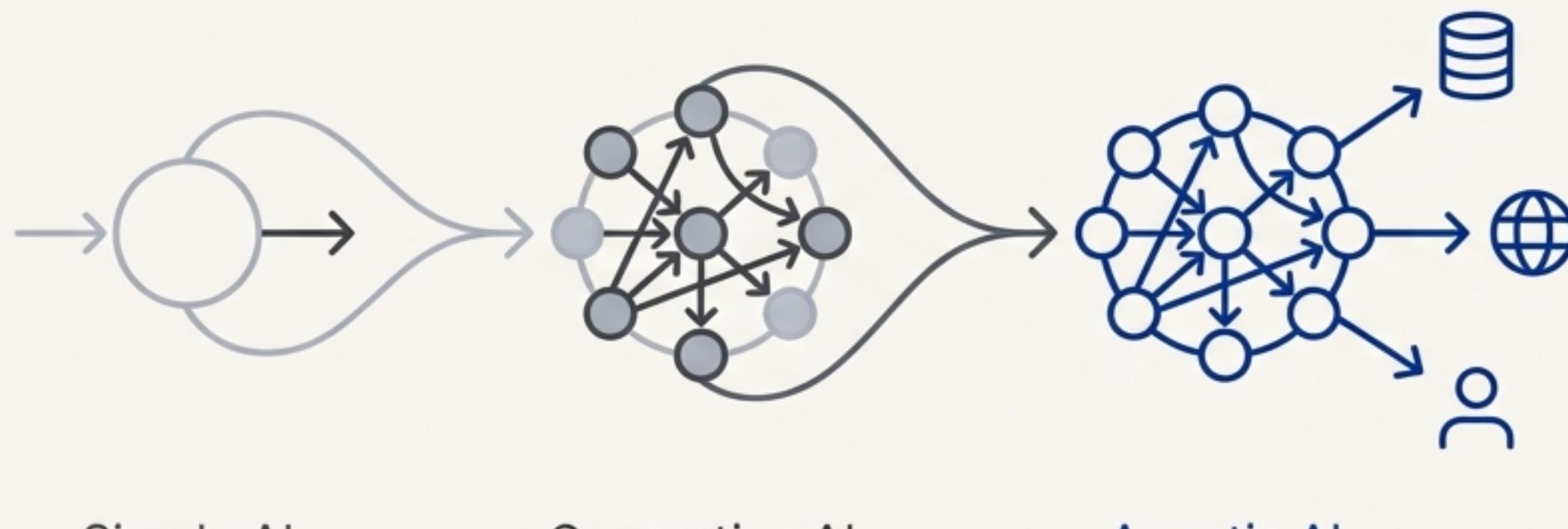


## THIRD LINE

### Assure & Audit

Internal Audit and other assurance functions provide independent validation.

# The next frontier is here: AI agents are reshaping governance.



The pace of AI innovation is not slowing. The rise of autonomous AI agents requires a fundamental shift in governance—from static, pre-deployment controls to continuous, real-time oversight.

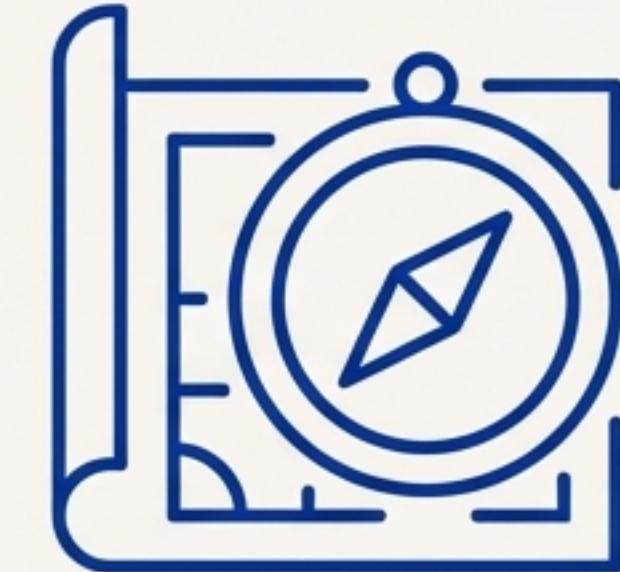
Organizations are now applying lessons from generative AI to build adaptive, resilient governance frameworks designed for autonomy.

# Strategic leaders are already building the governance needed for agentic AI.

69%

Proactive preparation is a key differentiator. The most mature organizations are embedding testing, data access controls, and observability directly into the design and deployment of autonomous systems to stay ahead of innovation.

of strategic-stage organizations have evaluation and testing capabilities in place or planned to govern AI agent activity.





“Governance for scale  
means constant feedback,  
testing, and evolution.”

PwC’s 2025 Responsible AI Survey

# Four imperatives for building governance that scales with innovation

Responsible AI is essential for realizing sustained performance from AI investments. To build governance that moves as fast as the technology, leaders should focus on these key areas.

## 1 Operationalize at Scale

Automate testing, monitoring, and observability across the AI life cycle. Use real-time data and feedback loops to strengthen confidence.



## 2 Clarify Accountability

Apply the three lines of defense model to align builders, reviewers, and assurers for faster, coordinated decision-making.



## 3 Design for Agentic AI

Build controls, testing, and review cycles directly into agentic systems from the start to stay ahead of emerging risks.



## 4 Adopt Continuous Improvement

Treat Responsible AI as a living system, not a static framework. Reassess and adapt constantly as technology and risks evolve.



# About the Survey

- From September 26 to October 2, 2025, PwC surveyed 310 US business leaders.
- Respondents hold Director, VP, or C-suite titles.
- The survey covers a diverse range of industries and company sizes.

