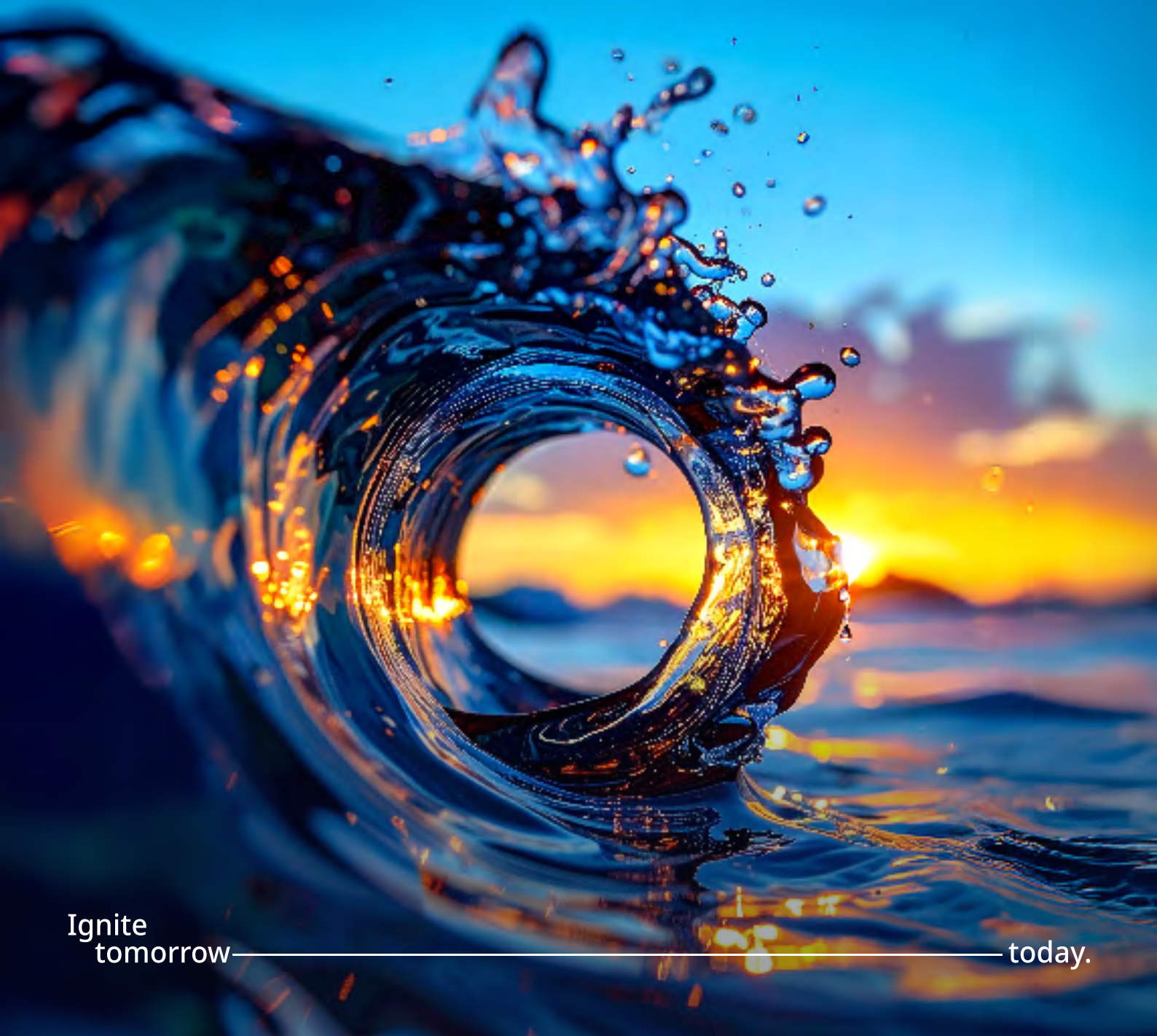
NTT DATA

2026 Global AI Report: A Playbook for AI Leaders

From pilots to profit: Turning AI vision into value



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Contents

Who is leading in AI?

In the era of AI, the old dividing lines between business and technology strategies are vanishing. Today, AI strategy and business strategy are becoming one.

An innovative technology that was once a supporting act for digital transformation has become the main event, with GenAI and agentic AI having a significant impact. Organizations' operational and economic destinies now depend directly on how quickly and responsibly they can industrialize AI.

This playbook, the first in our **2026 Global AI Report** series, is based on extensive research among more than 2,500 C-suite and other senior decision-makers across 15 industries and 35 countries in 5 regions. It covers developments in AI, GenAI and agentic AI as well as various approaches to AI, including private, sovereign and sustainable AI.

Overall, the data shows that forward-thinking organizations are moving from early alignment — where AI was treated as a complement to the business plan — to full fusion, where AI *is* the business plan.

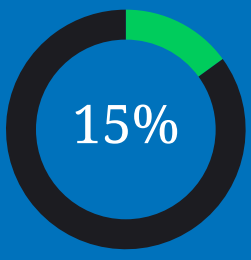
To paint a clearer picture of this trend, we have classified respondent organizations as **AI leaders** if all of the following are true, based on their survey responses:

- Their AI strategy is well-defined or in progress.
- Their level of AI maturity is "mature" or "evolved."
- They have realized significantly higher profits from AI than their peers.

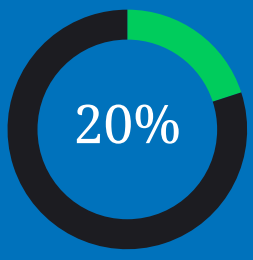
We also identified an opposite group, the **AI laggards** — organizations that have a poorly defined AI strategy (or none at all), rate their AI maturity as that of a "novice" or "explorer" (or have done no work in this regard) and have realized profit less often from implementing AI (often seeing no profit at all or even incurring losses).

How we split the cohort

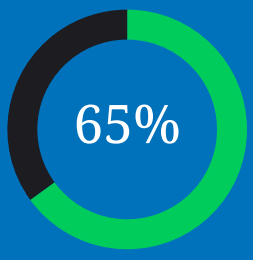
From our **2,567** respondents, we identified:



397 as AI leaders



516 as AI laggards



1,654 as unclassified in the "middle of the bunch"

When we compare AI leaders in this playbook with all other organizations, "all other organizations" includes both the AI laggards and the unclassified organizations, a total of **2,170 respondents (85%).**

Levels of AI maturity defined

- **No plans:** Have not yet explored usage in our organization
- **Explorer:** Strategies and plans under consideration, but no adoption or capability
- **Novice:** Just starting; limited experience and/or use cases
- **Enabled:** Use is sporadic and somewhat siloed; feasibility pilots and limited adoption by individual business units in mostly noncore functions
- **Mature:** Use is broad and strategic across business units and functions, with strong governance, best practices and scalable workloads
- **Evolved:** Incorporated into core and noncore business functions as well as continuous service delivery; AI-led innovation is accelerating business transformation and advancing business outcomes

How AI leaders stand out

Our data shows AI leaders are growth and margin outliers.

They are nearly **2.5 times more likely** than all other organizations to post revenue growth of more than 10% and **3.6 times more likely** to run at margins of 15% or more.

And while some of these leaders are very large organizations, as defined below, they are found in every revenue range in our research.

In short, these AI leaders:

- **Outgrow the pack: 62.8%** posted revenue growth of more than 10% in the last fiscal year, compared with **25.3%** of all other organizations.
- **Come in different sizes (with a skew toward very large): 17.1%** have revenue of more than $25 billion, compared with **12.6%** of all others.
- **Often have large-scale operations: 23.9%** have more than 50,000 employees, compared with just **15.5%** of all others.
- **Run at higher margins: 33.8%** operate at margins of **15%** or more, compared with **9.4%** of all other organizations.

AI leaders are found across all 15 industries, but our data shows they appear slightly more often in insurance (**11.6%** versus **11.3%** of all other organizations), consumer packaged goods (**9.6%** versus **6.8%**), technology, media and telecommunications (**7.8%** versus **4%**), retail (**6.1%** versus **4.2%**) and life sciences (**4.8%** versus **4.1%**).

Conversely, there are fewer in banking and investment (**10.1%** versus **11.8%** of all others), the automotive industry (**7.6%** versus **11.7%**), and in energy and utilities (**1.8%** versus **4.7%**).

9 key characteristics of AI leaders

In this playbook, we present the following nine key characteristics of AI leaders in more detail to illustrate how they operate and why they are already seeing the benefits of their investment in AI.

Strategy: Leaders treat AI as a core growth engine and rewire their strategies accordingly.

01 Strategic alignment and speed

AI leaders win by tightly aligning AI with business strategy and turning strategic focus and speed into outsized financial returns.

02 Focused end-to-end approach

Top performers focus on high-value domains that unlock disproportionate economic value and redesign workflows end to end.

03 Flywheel effect

These front-runners create a cycle where initial investments fuel early success that drives reinvestment for further growth.

04 Core reinvention

Growth leaders rebuild core applications with embedded AI rather than limiting themselves to surface-level add-ons.

Execution: AI leaders differentiate through resilient foundations, empowered humans, hardwired adoption and governance, and expert partners.

05 Secure at scale

AI leaders build scalable and secure stacks, localize or relocate AI infrastructure for private/sovereign AI and invest to eliminate infrastructure bottlenecks.

06 Expert-first AI

These front-runners use AI to amplify the impact of experienced, highly skilled employees rather than replace them.

07 Change that sticks

Top performers treat adoption as a company-wide change program and adopt constructive change management to reduce resistance.

08 Governed for scale

Leading organizations centralize AI governance, formalize enterprise-wide oversight, and empower dedicated Chief AI Officers (CAIOs) to own risk and align innovation.

09 Partner-powered growth

Best-in-class players lean on strategic external collaborators and are open to outcome-based gain-sharing models that accelerate AI value.

> “Once AI and business strategies are aligned, the single most effective move is to pick one or two domains that deliver disproportionate value and redesign them end to end with AI.”

Abhijit Dubey, Chief Executive Officer and Chief AI Officer, NTT DATA, Inc.

How AI leaders manage their organizations

AI leaders know that just investing in new technologies isn't enough to achieve the results they want. They also have to reimagine how their organizations operate. For them, the whole truly is greater than the sum of its parts.

Our research shows that these high performers take a fundamentally different and more comprehensive approach to structure, decision-making and change. They blend strategic clarity with operational agility, treating AI as an enterprise-wide capability rather than a series of isolated experiments.

What truly sets them apart is how deliberately they manage the business around AI: Aligning strategy at the top using well-defined metrics, redesigning processes from end to end, embedding governance at all levels of design and decision-making, empowering expert talent and scaling responsibly on secure foundations.

These organizations behave more like fast-moving, constantly learning systems in which early wins fuel further investment, and where ecosystem partners play a central role in accelerating value. While caution exists, it is accompanied by a level of precision — across AI strategies and tactics — that is essential to firmly establishing AI-native operations.

In this chapter, we break down the nine organizational practices, ranging from strategy to execution, that distinguish AI leaders from the rest. We explain how these practices enable them to grow faster and more efficiently while capturing clear returns from their AI investments.

The stack: GenAI, agentic AI and enterprise guardrails

The broad success of AI — encompassing both GenAI and agentic AI — rests on four cornerstones: high-quality data, world-class data engineering, powerful computing and scalable infrastructure. Together, these foundations have enabled the AI ecosystem to mature, with each layer defined by its unique role and responsibilities.

- **GenAI (the creator):** A revolutionary force mainstreamed in 2022, GenAI systems turn data into dialogue and ideas into drafts. They inspire creativity and democratize access to information that sparks insights, setting a new baseline for productivity across industries.
- **Agentic AI (the doer):** The defining leap of the moment, agentic AI extends GenAI from creation to action with autonomous, outcome-oriented systems that execute, iterate and optimize in closed loops. Agentic AI transforms static workflows into adaptive ecosystems.
- **Private, sovereign and sustainable AI (the protector):** As the AI stack becomes more complex, organizations seek greater control and compliance. Private AI secures proprietary data, while sovereign AI aligns with jurisdictional and regulatory frameworks that determine where data can be processed and stored. Sustainable AI balances computing, ethics and carbon footprints for long-term viability.

Individually, these layers represent distinct advances. Collectively, they form the fabric of enterprise AI, making it a cohesive, well-governed architecture for the intelligent organization.

Strategic alignment and speed

AI leaders win by tightly aligning AI with business strategy and turning strategic focus and speed into outsized financial returns.

Organizations that have fully aligned their AI and business strategies are far more likely to realize tangible financial benefits from AI than those that have not. More than **8 in 10** organizations with fully aligned strategies **(83.6%)** report an AI-related increase in profit of **5%** or more in the past fiscal year, compared with **77%** of organizations that report partially aligned strategies and **58%** of those who say their strategies are not aligned at all.

Reporting a profit increase of 5% or more from AI

These AI leaders also choose first-mover experimentation over a "wait-and-see" approach to implementing AI — and it shows in the impact:

- **46.1%** of AI leaders want to "move fast and lead the market," compared with **25.4%** of AI laggards and **33.3%** of all other organizations.
- Only **16.6%** of AI leaders "let others take the risks first," compared with **25.2%** of laggards and **17.4%** of all others.

Aiming to "move fast and lead the market" with AI

Willing to "let others take the risks first" with AI

To the board, AI's evolution to being the operating system of the organization signals something profound: AI is playing an increasing role in defining and driving the economic levers of enterprise value — growth, margin, risk and talent. Model choices accelerate speed and determine service levels; data architectures define market capabilities or offerings and pricing power; and AI agents increasingly become key sources of differentiation in performance and competitive advantage. Decisions once left to the IT team now sit at the heart of board-level strategy and shape the directives carried out across business functions. **In short: AI success is business success.**

Focused end-to-end approach

Top performers focus on high-value domains that unlock disproportionate economic value and redesign workflows end to end.

Because growth use cases yield disproportionate economic value, AI leaders prioritize high-value domain implementations with clear and timely returns. They redesign workflows end to end to realize a near-instant lift in productivity and clear cost benefits.

These high-value AI use-case prioritizations include front-office interactions in departments such as marketing, sales and/or customer service. AI leaders also prioritize back-office and mid-office workflow automation and optimization.

Our data shows **73.3%** of these leaders use AI to support front-office interactions and **85.6%** use AI in the back office and/or mid-office. In comparison, only **44%** of AI laggards focus on the front office, although **71.1%** report using AI to support back-office and/or mid-office workflows.

Among all other organizations, **58.7%** focus on the front office and **73.8%** on the back office and/or mid-office.

Using AI to support front-office interactions

Using AI to support back-office and mid-office interactions

Once again, AI leaders achieve results because they know where value is created, and they invest decisively in those areas.

Becoming AI-native

The transformation of workflows and processes is part of an organization's journey to an AI-native state.

Where cloud-native is about elasticity and scalability, AI-native is about adaptability and autonomy. AI-native architectures embed reasoning, feedback and self-correction into every layer. They are designed not just to host intelligence but also to *be* intelligent — to reconfigure themselves based on performance data and changing business conditions.

An AI-native business model is one where decisions, processes and outcomes are resource-considerate, software-defined and agent-driven. Such a model requires a full, bottom-up restructuring of the organization, in line with top-down CEO directives regarding AI strategy.

Flywheel effect

These front-runners create a cycle where initial investments fuel early success that drives reinvestment for further growth.

Our research data shows that the level of investment in AI matters and investment success drives reinvestment. Leaders are almost twice as likely as all other organizations to describe their AI spending as "very significant" — and many plan to significantly increase their investment over the next two years because they're already seeing results.

Nearly **7 in 10** AI leaders **(68.2%)** report very significant investment in AI, compared with only **45.5%** of laggards and just **34.6%** of all other organizations.

Additionally, **64.5%** of AI leaders plan to significantly increase their investment in AI, while **45%** of laggards and **40.3%** of all others say the same.

Very significant AI investment (current)

Planning a significant increase in AI investment in the next two years

The positive sentiment regarding new revenue streams being created by AI is most evident among technically strategic leaders, including the Chief Software Officer (CSO), and top operational leaders like the CEO, with **54.5%** of CSOs and **48.3%** of CEOs feeling "extremely confident" in this regard.

However, finance remains more cautious, arguing for tighter business cases and control points. Just **38.8%** of CFOs have the same level of confidence as CSOs and CEOs.

Core reinvention

Growth leaders rebuild core applications with embedded AI rather than limiting themselves to surface-level add-ons.

C-suite leaders increasingly recognize a hard truth: You can set bold AI ambitions, hire brilliant teams and select leading-edge models, but if your infrastructure is fragmented, underpowered or not secure, your organization will move slowly, add risk and lose value. With disconnected tools come the problems of duplicated costs, inconsistent controls and interfaces that fail under the weight of real users and high-stakes operations.

Every C-suite has seen big AI promises stalled by inadequate infrastructure and mounting errors. If data pipelines, networks, and identity and service management are weak, nothing else stands.

Embedding AI, not bolting it on

It's not surprising that, compared with laggards and all other organizations, AI leaders are investing more in rebuilding their core applications with embedded AI capabilities rather than limiting themselves to surface-level add-ons.

AI leaders are more likely **(34.5%)** than the rest to have adopted this strategy, with just **14.5%** of laggards and **18%** of all other organizations saying the same.

Rebuilding core applications with embedded AI (not bolted on)

The second most common approach to application modernization for AI — augmenting existing applications with AI add-ons or application programming interfaces (APIs) — is used more by laggards **(40.8%)** and by all others **(37.6%)** than by AI leaders, only **32%** of whom rely on this method.

Augmenting existing applications with AI add-ons or APIs

Hybrid AI deployment — plug-and-play solutions with some co-innovation — is the most common deployment approach overall (**50.1%** of leaders, **35.1%** of laggards and **48%** of all others).

Using hybrid AI deployment (plug and play with co-innovation)

Nearly half of AI leaders **(45.3%)** say they would pursue bespoke co-innovation solutions with the help of strategic system integrator partners. Only **36.6%** of laggards and **39.6%** of all other organizations would opt for this route.

Pursuing bespoke co-innovation with a strategic IT partner

Secure at scale

AI leaders build scalable and secure stacks, localize or relocate AI infrastructure for private/sovereign AI and invest to eliminate infrastructure bottlenecks.

When implementing AI, leaders are more likely **(31.5%)** than the rest to prioritize scalable, secure technology stacks, because they know secure platformed foundations reduce friction and speed up compliant scaling. This is true for just **22.1%** of laggards and **30.1%** of all others.

Prioritizing scalable, secure technology stacks

The power of a platform

A resilient, unified and cloud-native AI platform creates a shared fabric where models, agents, data products, guardrails and evaluations coexist.

The organization defines what to permit or forbid on the platform — once. These decisions are then enforced as policy for data access, prompt safety, model routing, agent capabilities, logging and retention.

Unified observability provides a common lens on latency, cost per inference, model drift, agent outcomes and security events.

The payoffs include faster onboarding of use cases, reusable components, governed autonomy and a common language for finance, risk and technology. Platforms can also be incorporated into larger ecosystems, offering the advantages of third-party offerings and solutions.

Organizations cannot scale what they cannot govern. As they graduate from proofs of concept to production platforms and agentic systems, the focus shifts from “Can we do this?” to “Can we prove we did it safely, fairly and profitably every time?”. If an organization’s strategy is to be AI-native, their infrastructure must make AI safe and revenue-positive to scale.

A prominent consideration among organizations is geopolitics, which is accelerating the move to private and sovereign AI. Maintaining data privacy across geographies has emerged as the single biggest governance concern for AI leaders, and many are responding by localizing or relocating their AI infrastructure.

Our data shows leaders are more likely **(59.4%)** than laggards **(49.6%)** and all others **(54.5%)** to flag cross-geography data privacy or sovereignty as a top governance concern.

Flagging cross-geography data privacy or sovereignty as a top governance concern

Sovereign and private AI defined

1

Sovereign AI: The geopolitical response

As global regulations tighten, sovereign AI is emerging as a strategic necessity to keep data, computing and control within national or regional boundaries. Sovereign AI environments are often mandated by policy, but they also deliver advantages in risk reduction, business resilience and compliance.

For multinationals, sovereign AI mirrors the old era of private data centers: tailored, compliant and geographically contained. From public services to financial institutions, it thrives in markets and industries where data residency, critical infrastructure and local control are not negotiable.

2

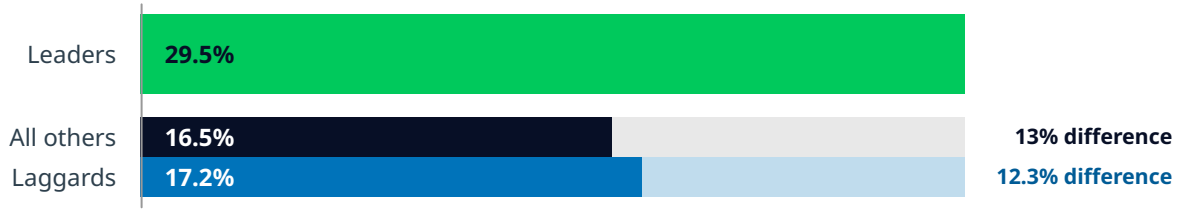
Private AI: The preference for control

Distinct from sovereignty, private AI reflects organizational preferences rather than political boundaries. Here, control is driven by sensitivity — intellectual property, regulated data, or the economics of owning rather than renting infrastructure.

Private AI allows organizations to optimize cost, performance and governance at the same time. It is also the gateway to AI-native architectures, where systems are designed from the ground up to absorb uncertainty, resist attack and scale across shifting market and regulatory landscapes.

AI leaders are also keen to avoid infrastructure bottlenecks in their quest to scale. They are candid about technical debt and willing to fund the work needed to address it. For them, the top infrastructure "blocker" (with **29.5%** selecting this option) is high maintenance needs that divert critical funds and time from innovation; this is true for only **17.2%** of laggards and **16.5%** of all other organizations.

Seeing high maintenance needs as their top infrastructure "blocker"



Expert-first AI

These front-runners use AI to amplify the impact of experienced, highly skilled employees rather than to replace them.

Every technology revolution is also a human one. AI is no different in this regard, but it's progressing a lot faster. Where previous transformations have advanced over decades, this one is unfolding in years.

Agentic AI, in particular, is redefining human work. Instead of job descriptions, organizations will define roles in terms of decision loops: data intake, interpretation, action and evaluation. Some loops will be fully automated; others will remain hybrid, with human oversight.

As a result, the workforce of the future will comprise collaborative ecosystems where humans define purpose and parameters while agents execute and optimize.

Our research shows that AI leaders' primary workforce goal is augmentation, not replacement. They want skilled, AI-savvy employees with institutional knowledge and a deep understanding of the business to focus on higher-value work, with targeted reskilling where needed.

Rebalancing talent portfolios

Workforce planning must now account for three new labor categories that, over time, will define new internal hierarchies.

01 **Augmented employees**
Knowledge workers, analysts and engineers whose roles are enhanced by AI tools to achieve step changes in productivity

02 **Supervisory operators**
Oversee agentic systems and are responsible for monitoring, escalation and ethical compliance

03 **AI-native professionals**
Specialists in prompt engineering, data governance, model evaluation and economic optimization

Leaders are more likely **(28.9%)** than laggards **(22.5%)** and all others **(24.3%)** to empower experienced employees with AI tools and leave junior staff to handle AI-augmented tasks.

Empowering experienced employees with AI tools

Change that sticks

Top performers treat adoption as a company-wide change program and adopt constructive change management to reduce resistance.

Becoming a fully AI-enabled organization depends on careful and effective change management, because AI-fueled change is as much emotional as it is operational. The "temperature" of the workforce — employees' confidence, fear, curiosity or resistance — will determine the success of even the best-laid AI plans.

Inside organizations, sentiment often oscillates between excitement and anxiety. Employees recognize the productivity promise of AI, but they are also concerned their roles or skills will become irrelevant. As a result, they may resist adopting AI for fear of eliminating their own jobs by doing so.

Meanwhile, business leaders require employees with business acumen to embed AI usage enterprise-wide. When experienced employees embrace AI, they become powerful change advocates and often emerge as the most visible and effective AI champions. Nearly half of AI leaders **(45.3%)** put greater weight on change management to scope, scale and embed AI in workflows — treating adoption as an organizational change rather than a simple technology rollout. Only **34.3%** of laggards and **37.3%** of all other organizations are taking this approach.

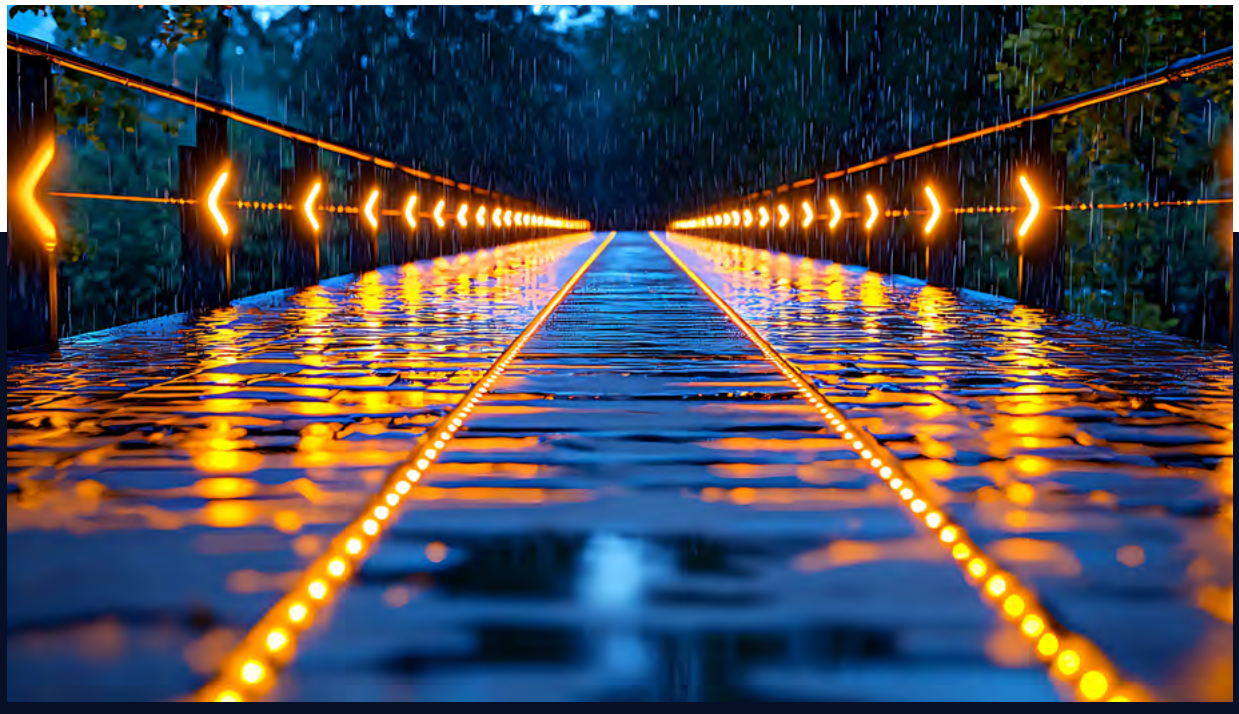
Using effective change management to scope, scale and embed AI in workflows

The preparedness of leaders — both in strategy and execution — gives them deeper confidence.

A significant number of these leaders **(73%)** report having a positive, proactive mindset to AI. They say they're confident, excited or amazed, compared with **45.7%** of laggards and **68.4%** of all other organizations.

Feeling positive sentiment toward AI (confident, excited, amazed)

Ultimately, no organization can achieve — or sustain — AI-leader status without effectively managing the human side of its AI strategy.



Governed for scale

Leading organizations centralize AI governance, formalize enterprise-wide oversight and empower dedicated CAIOs to own risk and align innovation.

Our data shows that AI leaders have moved decisively toward governance models that enable consistency, control and scalability across business units.

More than half of these leaders **(55.9%)** follow a centralized AI governance model, compared with just **33.3%** of AI laggards and **37.6%** of all others.

Following a centralized AI governance model

Leaders see AI as an enterprise capability, not an IT project — **56.2%** say they have an AI steering committee with an executive sponsor, domain leaders and representation from legal, security and more, compared with **46%** of laggards and **44.7%** of all others.

Have an AI steering committee

Keeping AI in check

A range of bodies can play a vital role in supporting leadership and steering the enterprise to responsible AI deployment.

AI governance office: Coordinates policies, compliance and audit readiness across teams; aligns the organization with regulatory, ethical and organizational standards

AI review board: Approves new use cases against risk taxonomy; reviews evaluation results; mandates mitigation before promotion

Safety and reliability council: Monitors incidents, override and deflection rates, and model or agent drift

Operational AI team: Runs evaluation, observability, rollback and routing

By standardizing decisions and artifacts, these bodies accelerate scale without compromising security or compliance.

AI leaders are more likely **(77.8%)** than laggards **(61.6%)** and all others (**60.9%)** to have a dedicated CAIO, and **28%** say their CAIO owns the enterprise risk for AI (this figure is **16.1%** for laggards and **23.2%** for all others).

Have a dedicated CAIO

Have a dedicated CAIO who owns enterprise AI risk

What the CAIO does

The emergence of the CAIO marks a turning point in enterprise leadership. As a board-level strategist charged with fusing business and technology agendas, the CAIO adds real value to change management.

The 3 mandates of the CAIO

1. **Strategic orchestration**
   Align AI investments with business outcomes and risk appetite.
2. **Operational integration**
   Embed AI safely into production systems, with observability and cost discipline.
3. **Cultural translation**
   Demystify AI for the board and educate technical teams on economic implications.

Partner-powered growth

Best-in-class players lean on strategic external collaborators and are open to outcome-based gain-sharing models that accelerate AI value.

To speed up AI value-creation, AI leaders lean more heavily on external partners, service providers, experts and advisors, and embrace outcome-based commercial models. More than a third **(39.3%)** focus on external collaborations (for example, with key industry experts, service providers or government advisors), compared with **27.3%** of laggards and **35.4%** of all other organizations.

Focusing on external collaborations

Looking at commercial models for AI implementation, leaders are more likely to be open to partnership-centric procurement (such as revenue sharing or gainsharing), with **46.4%** showing a preference for this model (as do **35.5%** of laggards and **39.5%** of all others.)

Open to partnership-centric procurement such as revenue sharing or gainsharing

Finding an expert partner for well-governed AI

Most organizations understand that navigating AI's complexity requires expert guidance.

With AI becoming deeply woven into their technological fabric, business operations and strategic planning, the challenge now is building lasting expertise.

An expert partner will combine models, tools, architectures, governance and sustainability expertise into a coherent program, with responsible-AI principles embedded in every layer of design and delivery.

Selection criteria for service providers that prioritize responsible AI should therefore include:

01 **Lessons learned** from testing and applying AI strategies in their own organization

02 **Multi-LLM and multicloud architecture,** to avoid vendor or geographical lock-in

03 **Systems integration expertise,** because AI does not thrive in isolation

04 **ROI and cost calculators** to reduce complexity in AI cost management

05 **Transparent governance of data and models,** including contracts, lineage, retrieval scoping and privacy by design

06 **Clear frameworks** for fairness, accountability and human oversight

07 **Security and safety, including** red teaming, continuous validation and incident-response strength

08 **Regulatory knowledge** to translate directives into enforceable internal standards

09 **Practical sustainability playbooks** that focus on both energy efficiency and human empowerment (so AI augments talent rather than replaces it)

10 **Partnerships** that create an ecosystem of technology providers and hyperscalers

11 **Local expertise** that complements global know-how

AI leadership is now synonymous with business leadership

Our global AI research, based on the experience of more than 2,500 senior leaders, confirms what many of us already sense: AI has moved from the periphery to the core of value creation. It is no longer an enabler of strategy; AI strategy *is* the strategy.

Organizations that treat AI as a growth engine, rebuilding their foundations accordingly and managing the human implications with intent, are pulling decisively ahead. The data shows that AI leaders outperform other organizations in growth, margins and operational resilience, often significantly. They align AI and business strategies from end to end, prioritize high-value use cases and are decisive first-movers. Early impact fuels reinvestment, creating a self-reinforcing flywheel that accelerates outcomes and competitive differentiation.

One of the most striking features is how AI leaders are structured. They increasingly operate as AI-native enterprises where workflows are redesigned, governance is centralized, infrastructure is secure and scalable, and expert talent is empowered, not displaced.

Leaders build platforms, not pilots. They embed AI into the core, rather than bolting it on. They partner deeply, govern rigorously and scale responsibly — and they reap rewards.

Looking ahead, it's clear that AI is becoming the operating system of the modern enterprise. Growth, margin, risk and talent will increasingly be shaped by how effectively we harness GenAI, agentic AI and sovereign AI within a resilient data and digital architecture.

And the emergence of a hybrid workforce, where humans and AI agents operate side by side, is a reality that cannot be ignored. How to recruit, train and govern not only people but also AI agents — and oversee them effectively — will require a new direction in leadership, change management and operational design.

Our global research proves that AI leadership is now inseparable from enterprise leadership. As we enter the next era of competitive advantage, organizations will require bold vision, disciplined execution and a willingness to reinvent — and those that act with momentum, clarity and responsibility will widen the performance gap at speed.

Visit our website to see how NTT DATA can help you chart a path forward with AI.

> "AI accountability now belongs in the boardroom and demands an enterprise-wide agenda ... AI leaders are already are using AI to differentiate, grow, and reinvent how humans and machines create value together."
>
> **Yutaka Sasaki,** President and Chief Executive Officer, NTT DATA Group

Explore our research data in detail

Our 2026 Global AI Report survey is another milestone in primary research and thought leadership from NTT DATA. Look out for more insights and perspectives based on our findings, and contact us to see how our comprehensive global research data, coupled with our consulting and services expertise, can support your organization's success.

About the research

Our primary research spans 35 countries in 5 regions, across 15 industries

A balanced sample of 2,567 global respondents, comprising key decision-makers from large IT (53%) and non-IT (47%) enterprises — mostly in C-suite roles.

North America 575

Canada: **75**

US: **500**

Latin America 300

Argentina: **50**

Brazil: **50**

Chile: **50**

Columbia: **50**

Mexico: **50**

Peru: **50**

Europe 745

Austria: **30**

Belgium: **75**

France: **75**

Germany: **115**

Italy: **75**

Luxembourg: **30**

Netherlands: **75**

Portugal: **50**

Spain: **75**

Switzerland: **30**

UK and Ireland: **115**

Africa 75

South Africa: **75**

Asia Pacific 872

Australia: **112**

China: **50**

Hong Kong: **50**

India: **115**

Indonesia: **50**

Japan: **110**

Malaysia: **50**

New Zealand: **30**

Philippines: **50**

Singapore: **75**

South Korea: **30**

Taiwan: **50**

Thailand: **50**

Vietnam: **50**

The research in numbers

Business functions

CEO | **10%**

CAIO | **4%**

IT | **31%**
(5% software engineers)

IT security | **11%**

Digital | **6%**

Operations | **21%**

Non-IT support | **17%**
(legal/compliance, risk, finance, HR, etc.)

Expertise

IT: **31%**

Operations: **21%**

CEO and/or CAIO: **14%**

IT security: **11%**

Digital: **6%**

Legal, risk and compliance: **6%**

Finance: **5%**

HR: **3%**

Marketing: **3%**

Includes:

Principal decision-maker/part of decision-making team: **94%**

Decision or budget influencer: **6%**

Organization size

2,501 to 5,000: **5%**

5,001 to 10,000: **11%**

10,001 to 15,000: **33%**

15,001 to 50,000: **34%**

50,001+: **17%**

Role levels

C-suite: **79%**

VP/Head of/Director: **15%**

Senior Manager: **6%**

The C-suite includes:

CIO or CTO: **16%**

CEO: **10%**

COO: **8%**

CCO or CXO: **8%**

CDO: **6%**

CISO: **6%**

Chief Risk/Compliance/ Legal Officer: **6%**

CFO: **5%**

CAIO: **4%**

CHRO: **3%**

CMO: **3%**

Chief Software Engineer: **2%**

Other C-suite: **2%**

15 industries

Automotive: **11%**

Banking and investment: **12%**

Consumer packaged goods: **7%**

Energy and utilities: **4%**

Healthcare: **5%**

Higher education and research: **5%**

Insurance: **11%**

Life sciences and pharmaceuticals: **4%**

Logistics, travel and transportation: **5%**

Manufacturing: **11%**

Mining and natural resources (including oil and gas): **7%**

Public sector: **4%**

Retail and ecommerce: **5%**

Supply chain: **4%**

Telco, media and technology: **5%**

Research methodology

All content in our 2026 Global AI Report series is based on independently sourced research data.

Participants were prescreened and then selected via random sampling on the basis that they had a direct or indirect influence on their organization's AI requirements, or decision-making authority in that regard.

The research data was gathered via an online questionnaire that ran in September and October 2025. Primary research fieldwork was conducted for NTT DATA by STRAT7 Jigsaw, an international strategic insight analytics and market intelligence agency with an exclusively senior team.

Data integrity, validation and analysis were performed by NTT DATA's specialist in-house Primary Research and Benchmarking Team. Data and outliers were validated in conjunction with STRAT7 Jigsaw and in accordance with standard research-industry rules, disciplines and best-practice approaches. The complete data set is presented at a **99%** confidence level with a **3%** margin of error.

December 2025

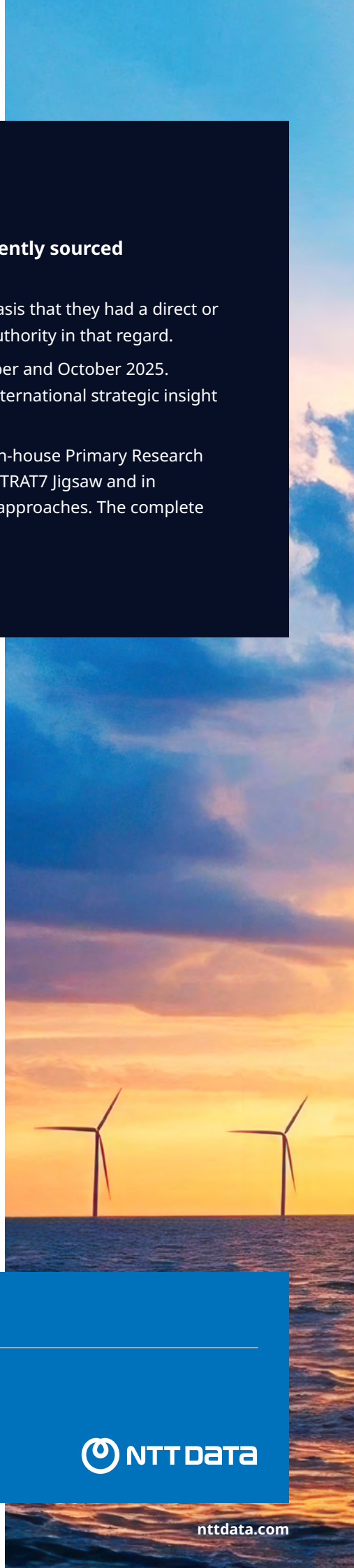
Meet the AI mandate head-on

NTT DATA is one of the world's leading AI and digital infrastructure providers, with unmatched capabilities in enterprise-scale AI, cloud, security, connectivity, data centers and application services.

We are committed to accelerating client success and positively impacting society through responsible innovation. Our full-stack, end-to-end portfolio of AI services and solutions incorporates models, data and platforms, secure ecosystems, and governance, compliance and ethics frameworks.

We curate AI ecosystems for organizations in every industry, and our Smart AI Agent™ Ecosystem matches industry-specific agents to business processes.

With our local expertise and global reach, we are the smart choice for helping you make AI strategy your business strategy and accelerate toward an AI-native state.



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NTT DATA is a $30+ billion business and technology services leader in AI and digital infrastructure. We accelerate client success and positively impact society through responsible innovation. As a Global Top Employer, we have experts in more than 70 countries. NTT DATA is part of NTT Group.

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