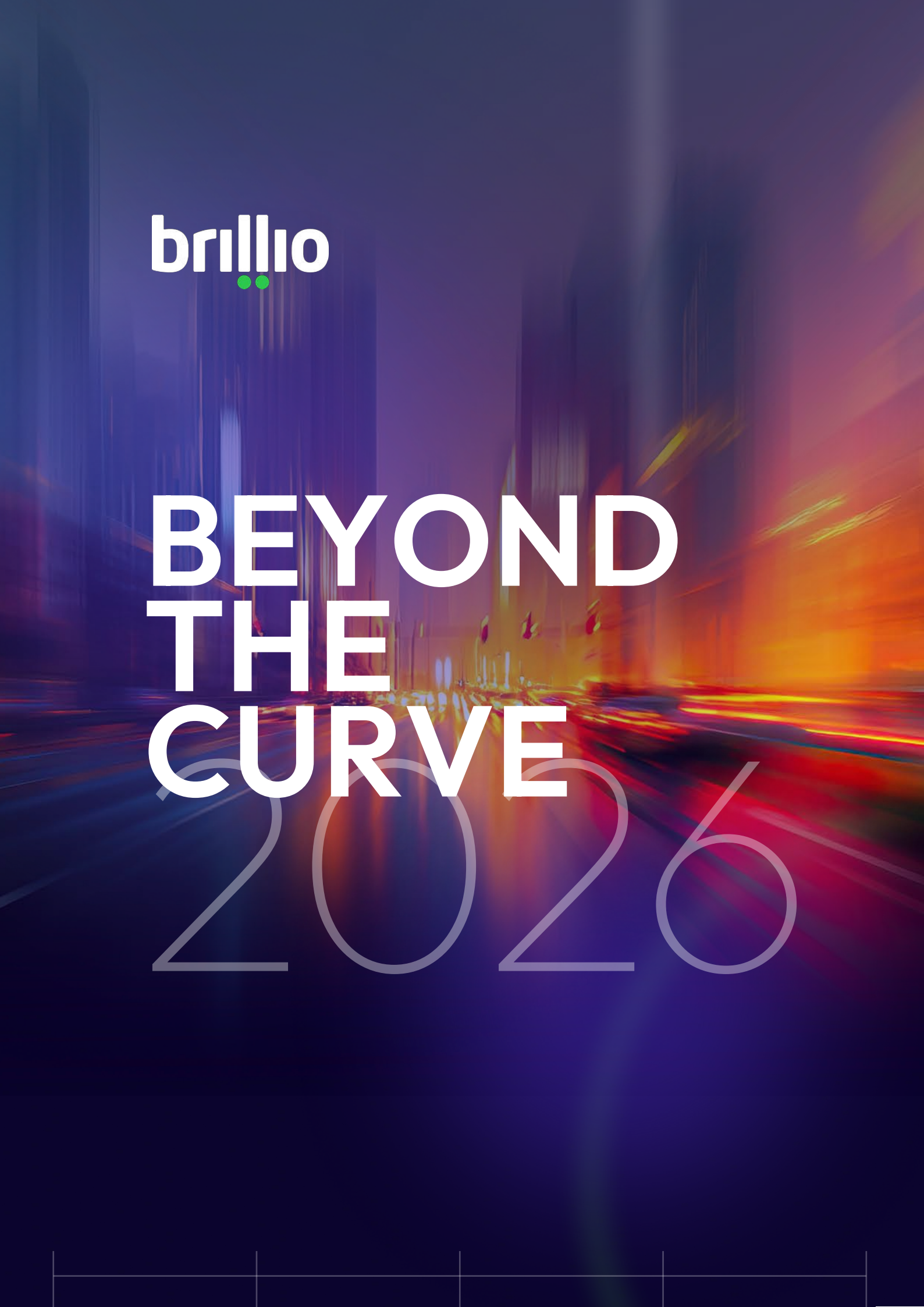
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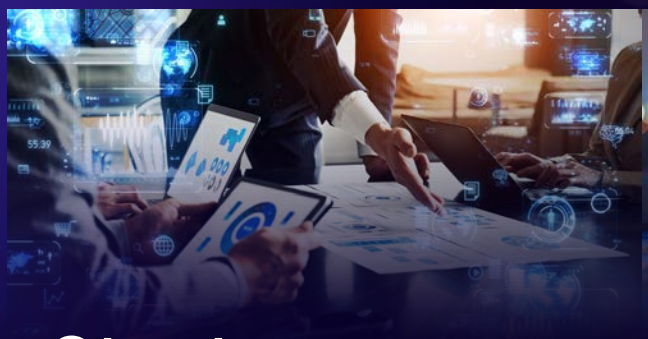
REFRAMING THE AI AGENDA

Across industries, the pace of AI innovation is prompting leaders to develop clearer, strategic perspectives. The narrative is no longer about whether AI will transform the enterprise, but about how quickly leaders can seed value and turn 'promise' into P&L impact. In today's lived reality, the difference between an AI-enabled growth engine and a sprawl of AI pilots will be decided by addressing three crucial dilemmas: Strategy, Technology, and AI-native Talent.



Strategy

Technology

AI-native Talent

THE THREE ORGANIZATIONAL DILEMMAS IN 2026

1 Strategy

Identifying how and where AI creates advantage

The right strategic choices overcome organizational inertia and compound impact.

The focus is shifting from model-first thinking and toward outcome-anchored decision paths. Levers like accelerated time-to-decision, shorter operational cycles, and deeper personalization are pushing organizations to lean toward integrated end-to-end operating models that link strategy, use-case portfolio, and value realization at scale.

WHAT'S BECOMING STANDARD

Outcome-first design
ensuring every use case is tied to business results.

Portfolio discipline
balancing bets across horizons (for example: near-term productivity, mid-term growth, long-term reinvention).

Pathways to build
choosing between rewire, rip-and-replace strategies or digital-native, greenfield-based routes for impact, not novelty.

Governance and accountability
with established owners, funding, guardrails, and value tracking from day one.

Technology

Architecting with the right platforms

Winners adopt platform thinking, productizing AI capabilities instead of running experiments.

The tech landscape is fluid: cloud vs. on-prem, open vs. proprietary, single vendor vs. composable stacks; copilots, agents, and so on. The answer is less about 'AI models' and more architectural: trusted, resilient, future-ready intelligent infrastructures. Enterprises are increasingly shifting from isolated AI experiments to platform-led approaches that productize capabilities and support scale.

WHAT'S BECOMING STANDARD

Model and vendor neutrality
to keep switching costs low and avoid lock-in.

Composable design
treating models, vendors, agents, guardrails, and orchestration as modular building blocks for business-grade products.

Policy as code
that embeds governance, security, and compliance in pipelines, making policy programmable.

Observability by design
with visibility into performance, drift, lineage, and cost from development to production.

Integration readiness
to meet the enterprise where it is: data contracts, governance frameworks, and regulatory obligations included.

3 Talent

Building AI-native capability at scale

If AI is the capability, then talent is the flywheel that compounds it.

AI talent is emerging as the force multiplier that determines how quickly value materializes. Beyond pilots, enterprises are raising AI literacy and situational fluency that codifies institutional knowledge while keeping human judgement central to high-stakes decisions.

WHAT'S BECOMING STANDARD

Enterprise AI literacy

to raise the baseline across functions and demystify the tools and risks.

Integrated AI product teams

that pair domain experts with data, engineering, design, and risk to ship AI products, not projects.

AI-native roles

like product owners for AI, data engineers, agent operators, and governance leads.

Talent mix optimization

to blend targeted acquisition with contractor rationalization to accelerate onboarding of AI-ready teams.

Knowledge in systems but judgement with humans

that capture process intelligence and guardrails in code but keep humans in the loop for exceptions and ethics.

What defines top performers?

Institutionalization not experimentation

Deliberate choices on strategy, platforms, and talent will convert **AI into a durable advantage.**

Market Outlook 2026–27

Agentic AI

Global Business Landscape: A Phase of Measured Stability and Strategic Reorientation

The global business environment is entering a period of measured stability. The IMF projects GDP growth of 3.1% and inflation easing to 3.6%, supported by moderating consumer demand, fiscal recalibration, and comparatively stable energy markets.

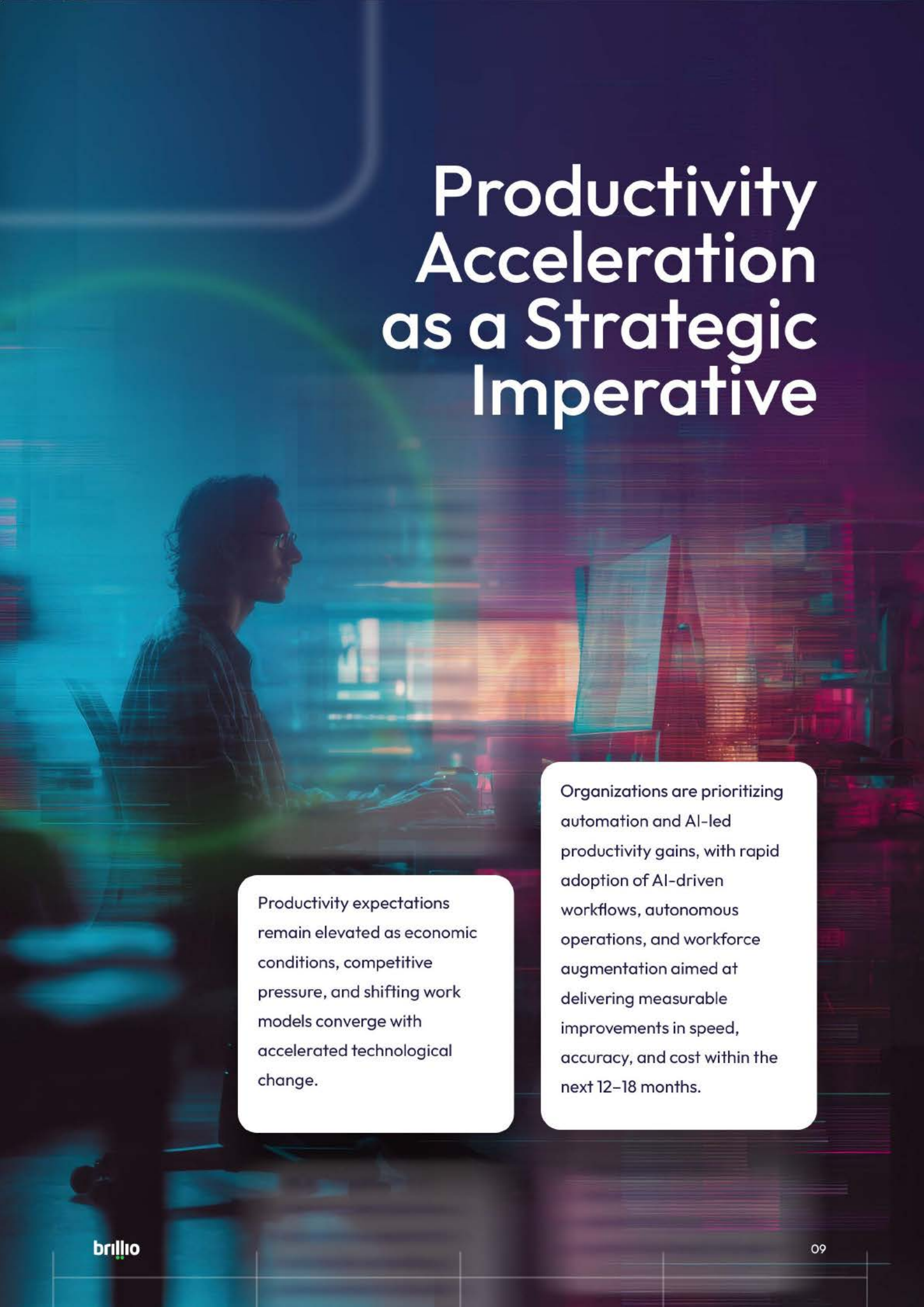
At the same time, geopolitical complexity, shifting trade blocs, and macroeconomic uncertainty continue to shape strategic considerations at the board and C-suite levels.

Resilient Operating Models

Ongoing geopolitical tensions, evolving alliances, and periodic supply-chain disruptions are reshaping global operating footprints. Organizations are broadening geographic diversification, enhancing resilience measures, and incorporating real-time risk intelligence into core decision frameworks.

Looking ahead to 2026, organizations are increasingly complementing cost-efficiency goals with a **'best cost + lowest risk'** approach to ensure continuity and strategic flexibility.

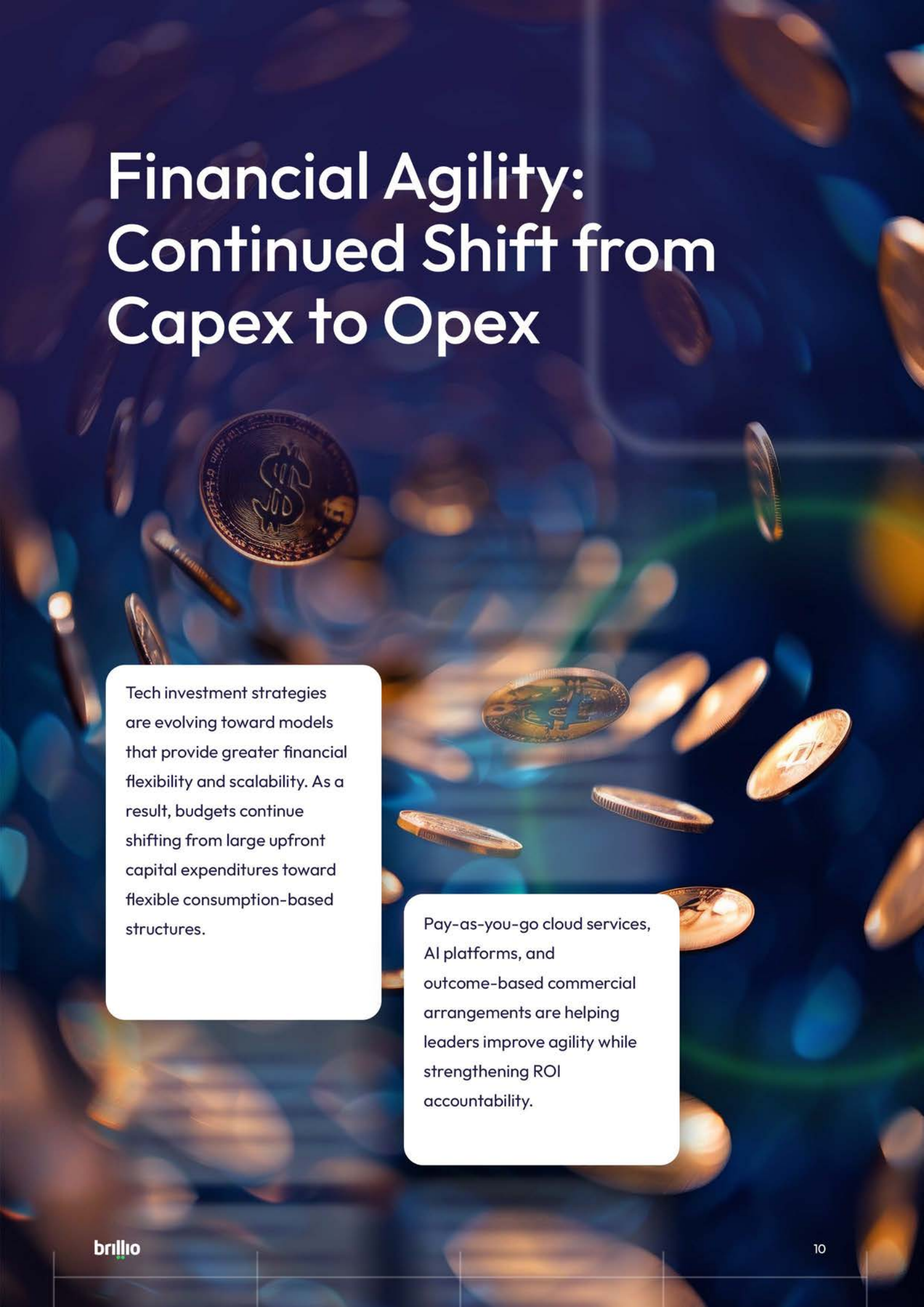
Productivity Acceleration as a Strategic Imperative



Productivity expectations remain elevated as economic conditions, competitive pressure, and shifting work models converge with accelerated technological change.

Organizations are prioritizing automation and AI-led productivity gains, with rapid adoption of AI-driven workflows, autonomous operations, and workforce augmentation aimed at delivering measurable improvements in speed, accuracy, and cost within the next 12–18 months.

Financial Agility: Continued Shift from Capex to Opex



Tech investment strategies are evolving toward models that provide greater financial flexibility and scalability. As a result, budgets continue shifting from large upfront capital expenditures toward flexible consumption-based structures.

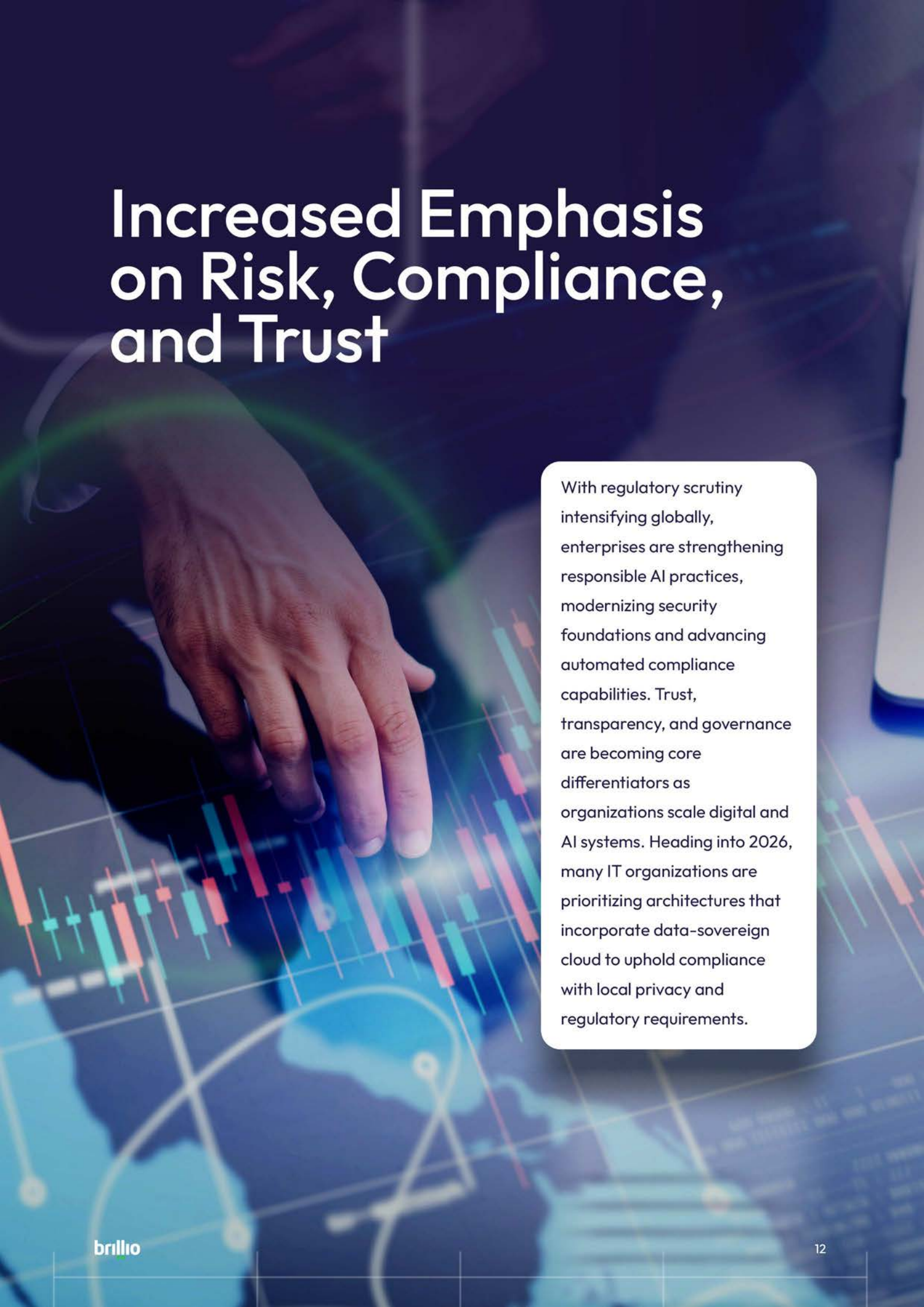
Pay-as-you-go cloud services, AI platforms, and outcome-based commercial arrangements are helping leaders improve agility while strengthening ROI accountability.

Evolving Talent Landscape in Digital and AI

Organizations continue to navigate structural talent constraints driven by rapid technological advancement, changing workforce expectations, and heightened market competition. The demand-supply gap for digital and AI skills is accelerating the use of AI-assisted engineering, copilots, and multi-agent development frameworks.

Organizations are pairing these tools with scaled reskilling and upskilling initiatives to sustain delivery velocity and maintain innovation momentum.

Increased Emphasis on Risk, Compliance, and Trust



With regulatory scrutiny intensifying globally, enterprises are strengthening responsible AI practices, modernizing security foundations and advancing automated compliance capabilities. Trust, transparency, and governance are becoming core differentiators as organizations scale digital and AI systems. Heading into 2026, many IT organizations are prioritizing architectures that incorporate data-sovereign cloud to uphold compliance with local privacy and regulatory requirements.

Key Business Priorities for Leaders

Leaders are recalibrating priorities to strengthen competitiveness and build long-term resilience. In response, organizations are emphasizing cost efficiency, digital and operational resilience, and customer-centric innovation, while exploring new business models to unlock growth in an increasingly dynamic marketplace.

1 Cost Optimization and Efficiency

In a margin-conscious environment, cost discipline remains a central executive focus. According to BCG, one-third of executives cite cost as their most critical priority, leading to renewed attention on supply-chain optimization, product simplification, and capital allocation. These efforts are designed to enhance competitiveness, improve financial agility, and free up resources for strategic reinvestment.

2 Digital Transformation and Business Resilience

Operational resilience continues to gain prominence as enterprise navigate supply-chain variability and rising cybersecurity complexity. Research from CIO and Leader indicates that 76% of organizations are investing in cloud modernization, real-time analytics, and automated workflows to strengthen uptime, enhance adaptability, and reinforce core business operations.

3 Customer Experience Enhancement

With digital expectations rising and differentiation narrowing, customer experience has become a defining yardstick of enterprise strategy. 85% of organizations now identify CX as a top priority, driving investment in AI-powered personalization, omnichannel engagement models, and predictive service capabilities aimed at reducing friction, improving satisfaction, and deepening loyalty in experience-driven markets.

4 Revenue Growth and New Business Models

To offset slowing growth in traditional product lines, enterprises are rethinking how they create and capture value. According to PwC, 76% of leaders are prioritizing revenue expansion through new business models, prompting investment in subscriptions, data monetization, platform ecosystems, and AI-enabled services. These models are helping organizations build scalable, recurring revenue streams and position for sustainable, long-term growth.

Three Technology Themes That Power Transformation

As organizations prioritize cost efficiency, resilience, customer experience, and new digital business models, three technology themes are emerging as foundational enablers:

The AI-driven Enterprise, AI Scaling Through Integration, and Trust, Resilience, and Sustainability. These three themes collectively support smarter automation, scalable digital operations, and secure growth, aligning investments with core business priorities.

The AI-driven Enterprise

AI has become central to enterprise transformation. Organizations are embedding AI into workflows and products to strengthen decision-making, streamline operations, and elevate customer experience. Emerging capabilities like Agentic AI and multi-agent systems are enabling autonomous planning and execution, driving productivity and enhancing operational resilience. Domain-specific language models are improving accuracy and reducing costs by tailoring intelligence to industry contexts, while AI-native development platforms are accelerating engineering cycles and reducing dependency on scarce talent. As adoption scales, AI security platforms are becoming essential to safeguard model integrity, data protection, and policy compliance.

AI Scaling Through Integration

Models create potential, but integration is what turns that potential into measurable business value. As enterprises move beyond experimentation, Process Intelligence will emerge as the next major disruptor connecting data, decisions, and actions across end-to-end workflows. Success in this next phase of AI will depend less on having the smartest models and more on deep, seamless integration into enterprise processes, platforms, and operating models.

Trust, Resilience, and Sustainability

As digital ecosystems expand, enterprises are placing greater emphasis on security, compliance, and ethical governance. AI-driven pre-emptive cybersecurity is helping organizations detect and neutralize threats earlier, while digital provenance ensures authenticity and traceability across data and content flows. Geo-patriation is gaining momentum as organizations shift technology and data to sovereign regions for risk mitigation. At the same time, responsible AI governance is becoming a foundational requirement to ensure transparency, fairness, and regulatory alignment, reinforcing trust and long-term sustainability.

AI has become the most transformative technology theme for enterprises, reshaping how organizations automate, optimize, and scale digital operations. Within this broader wave, Agentic AI stands out as the fastest-adopted and highest-impact capability. It enables autonomous execution, intelligent decisioning, and accelerated productivity gains.

The enterprise Agentic AI market is projected to reach

$40 billion by 2030

growing at a **47% CAGR**

underscoring the rapid shift toward autonomous, agent-driven enterprise systems (Global News Wire).

Reframing Enterprise Investment and Decision Authority

Agentic AI is emerging as a defining enterprise technology theme. Its adoption is reshaping workflows, operating models, and strategic priorities. This shift is also influencing enterprise technology spend and decision pathways, with a broader set of stakeholders now playing active roles in investment choices, vendor engagement, and budget allocation.

Heading into 2026, enterprise spending patterns and IT decision-making are evolving significantly. The buying center for Agentic AI is becoming more cross-functional than traditional technology categories. CIOs and CTOs continue to sponsor core platform decisions, while CFOs are taking a more prominent position as ROI-driven investment frameworks gain traction.

According to a PYMNTS Intelligence survey, only 26.7% of CFOs intend to increase GenAI budgets, and those who do are prioritizing ROI-aligned use cases like autonomous AI agents.

Business unit leaders in operations, customer service, and back-office functions are accelerating adoption as well, with 44% planning deployments to enhance workflows and automate decision cycles. CISOs and CROs are influencing purchasing criteria, as 60% of security leaders view RPA-based automation platforms as foundational for safely scaling Agentic AI. This is especially true for governance, compliance, and controls around autonomous behavior, policy execution, and data access.

How Agentic AI is Reshaping Spend

Before Agentic AI, most enterprise budgets were distributed across cloud infrastructure, machine learning pilots, robotic process automation, and legacy application support. Investments largely focused on 'run-the-business' efficiencies rather than transformative change. As organizations move toward autonomous systems, spending priorities are shifting structurally. Budgets are being reallocated from traditional automation to platforms that support multi-agent orchestration, governance, and enterprise-grade scalability.

Reallocation Toward Agent Platforms

Organizations are increasing investment in agent-orchestration platforms, multi-agent systems, and AI-native development toolchains as they move beyond the constraints of legacy RPA and BPM: IDC projects global spending on Agentic AI to reach $1.3 trillion by 2029, with the largest share dedicated to infrastructure build-out, followed by agent construction and control, AI-enabled applications and AI IT and business services. This signals a clear shift toward scalable, production-grade agent ecosystems.

New Investments in Infrastructure and Governance

As Agentic AI adoption accelerates, organizations are expanding their infrastructure capacity, including hybrid cloud and AI compute to support autonomous operations. Governance is becoming equally critical: 59% of organizations have formal AI governance roles in place, and 50% are investing in structured risk-management frameworks. These investments ensure that autonomous agent deployments remain secure, compliant, and operationally reliable.

Surge in Startup Funding and Emerging Business Models

Venture capital and private equity are increasing investment in agent-as-a-service platforms, particularly in financial services, developer tooling, and workflow automation. The category is benefitting from a projected 40% CAGR in multi-agent orchestration, expected to reach $30 billion by 2027. This infusion of capital is accelerating innovation cycles, driving competitive differentiation, and enabling organizations to adopt agentic solutions faster than traditional procurement models.

Industry-level Spending Priorities

70% Agentic AI adoption is gaining strong traction across industries, with BFSI, healthcare, and retail accounting for nearly **70%** of enterprise PoCs. These sectors are prioritizing autonomous workflow optimization, real-time decisioning, and enhanced service delivery as they scale next generation AI capabilities. Here's a list of sector-specific challenges that organizations are investing in.

Banking, Financial Services and Insurance (BFSI)

BFSI organizations are advancing toward autonomous finance, underwriting, and risk management, using agentic systems to improve accuracy and compress cycle times. The segment is projected to grow from $5.1 billion in 2025 to $33.26 billion in 2030, reflecting a **43.3% CAGR**.

Healthcare

Healthcare providers are deploying clinical workflow agents and patient-support agents to reduce administrative load and enhance care delivery. Market spend is expected to increase from $783.65 million to $4.96 billion, at a **45.6% CAGR**.

Retail and CPG

Retail and CPG organizations are adopting agentic systems for personalized commerce, demand sensing, and supply-chain optimization, improving conversion and reducing operating costs. Market growth is projected to rise from $46.74 billion to $175.11 billion, at a **30.2% CAGR**.

Communications, Media and Telecom (CMT)

CMT firms are using Agentic AI for network automation, content generation, and customer engagement at scale. The market is set to expand from $5.5 billion in 2025 to $187.7 billion by 2034, representing a **48.5% CAGR**.

Despite strong momentum, Gartner cautions that over 40% of Agentic AI initiatives may be discontinued by 2027 due to unclear value pathways and insufficient governance.

Success Factors

The most successful enterprises are aligning Agentic AI programs with measurable outcomes, strengthening governance and risk controls, and investing in differentiated platforms that support secure, scalable deployment. When executed effectively, Agentic AI delivers material productivity gains, enhanced operational resilience, and sustained long-term impact, turning early enthusiasm into durable enterprise value.

Agentic AI and Industry Adoption Patterns

Agentic AI

is accelerating enterprise transformation by moving industries beyond task automation and toward outcome-driven autonomy.

Adoption is advancing most rapidly in sectors with high operational complexity, stringent regulation, and rich data environments.

BFSI

The BFSI sector is at the leading edge of digital reinvention, as mobile banking, open APIs, and real-time payments reshape customer expectations and competitive dynamics. Institutions are modernizing through cloud migration, AI-enabled innovation, and redesigned customer journeys, while fintech partnerships and sustainability initiatives broaden strategic initiatives.

Even with this progress, legacy systems, fragmented data architectures, and rising regulatory complexity continue to challenge scalability. Agentic AI is emerging as a pivotal enabler, automating workflows like KYC/AML, loan underwriting, and real-time monitoring, while strengthening compliance and reducing operational risk. By orchestrating end-to-end financial operations, Agentic AI enhances decision-making speed, efficiency, and customer engagement across the value chain.

Investments are increasing in AI-native platforms for fraud detection, risk management, compliance automation, and intelligent workflows. Typically, these are deployed on hyperscaler infrastructure with domain-specific controls to meet regulatory demands.

KEY USE CASES

Customer service and advisory automation

Virtual assistants manage inquiries, loan initiation, and personal banking tasks, improving responsiveness and experience.

Fraud detection and compliance monitoring

Agents analyze transactions and behavior patterns to identify anomalies and strengthen regulatory oversight.

Back-office and lending automation

AI accelerates credit scoring, underwriting, and risk evaluation, reducing cycle time and lowering operational costs.

Healthcare

Healthcare is rapidly adopting digital-first operating models, supported by telemedicine, AI-driven diagnostics, and connected health technologies. Providers are increasing investments in data platforms. These personalize care, manage populations, and optimize clinical and administrative workflows within complex privacy, security, and interoperability constraints.

Persistent challenges like fragmented records, administrative overhead, and slow decision cycles continue to strain clinical resources. Agentic AI addresses these barriers by automating documentation, scheduling claims processing, and triage while supporting real-time data interpretation and cross-department coordination. This enhances efficiency, reduces errors, and elevates care quality.

Strategic investment is weighted toward regulatory compliance, patient safety, and reimbursement models for AI in clinical care. Talent investment is becoming more targeted, emphasized clinical informatics and AI-proficient clinicians.

KEY USE CASES

Care co-ordination

Autonomous scheduling, reminders, and cross-provider coordination.

Treatment planning

Evidence-based, patient-specific treatment recommendations.

Claims and prior authorization

Automated processing to reduce delays and administrative workloads.

Life Sciences

Life Sciences is experiencing rapid advancement in digital R&D, precision medicine, and AI-powered drug discovery supported by integrated research ecosystems and real-time patient monitoring. Organizations are adopting data-driven approaches to optimize trial design, accelerate regulatory processes, and personalize therapies.

Lengthy R&D cycles, high costs, and the complexity of managing large clinical datasets remain constraints. Agentic AI addresses these challenges by automating research workflows, enabling continuous trial monitoring, and synthesizing multi-modal scientific data. These capabilities accelerate discovery, improve compliance, optimize resource allocation, and reduce time-to-market.

Investment is directed toward AI-native talent (computational scientists, machine learning engineers, and bioinformatics) and toward targeted portfolio and partnership strategies rather than broad AI programs.

KEY USE CASES

Drug discovery

Autonomous analysis and predictive simulations

Clinical trial management

Automated recruitment, data collection, and regulatory reporting.

Regulatory and compliance automation

Generation of submissions, SOPs, validation documentation, and traceability records.

Retail and CPG

Retail and CPG are being reshaped by digital commerce, omnichannel integration, and AI-driven consumer intelligence. As sustainability mandates and global supply chain complexity increases, organizations are investing in predictive analytics, automated inventory management, and personalized marketing to respond to market shifts with greater agility.

Fragmented data, supply chain inefficiencies, and demand volatility remain challenges. Agentic AI enhances resilience and operational efficiency by autonomously optimizing inventory, forecasting demand, and orchestrating logistics. These capabilities accelerate product rollouts and improve customer experience. Hyperscalers like Amazon and Microsoft are advancing AI platforms for demand forecasting, personalization, and supply chain optimization by particularly emphasizing retail-first innovation.

KEY USE CASES

Personalized Value at Scale

Personalization will evolve from experiences to personalized economic value

Process-aware Supply Chain and Execution

AI will be embedded into end-to-end retail processes planning, replenishment, logistics, and store execution

Agentic Retail Operations

Retailers will shift from AI that informs decisions to AI that executes decisions across merchandizing, pricing, supply chain, and store operations

Hi-tech

The hi-tech sector is transforming through cloud computing, edge infrastructure, pervasive IoT, and AI-driven software. Demand for real-time data, scalable platforms, and next-gen hardware continues to rise, even as global competition compresses innovation cycles. Agentic AI is reshaping IT and engineering operations by automating software development tasks, optimizing workflows, and autonomously managing infrastructure. This reduces manual intervention, accelerates innovation, and strengthens operational resilience.

Investment priorities focus on embedding AI across products (software, devices, silicon) and within engineering productivity environments. AI-native talent remains a major spend category, while strategy programs are increasingly integrated into ongoing R&D.

KEY USE CASES

IT operations automation

Incident response, maintenance, and resource optimization.

Software development

Code generation, testing, debugging, and deployment.

Cybersecurity

Continuous monitoring and autonomous remediation.

Communications, Media and Telecom (CMT)

CMT is undergoing rapid transformation with 5G expansion, early-stage 6G development, and growing demand for streaming and immersive media. AI-driven analytics, cloud-native infrastructure, and automated network management are becoming critical differentiation as providers scale connectivity and content capabilities.

Operational complexity remains high for network optimization, bandwidth management, and secure content delivery. Agentic AI supports these challenges by autonomously monitoring networks, managing traffic, and personalizing services. This enhances efficiency, reduces operational cost, and strengthens customer experience.

Investments focus on network automation, marketing and customer-service agents, conversational commerce, and content optimization. Monetization models are shifting toward usage- and outcome-based AI services.

KEY USE CASES

Network optimization

Predictive traffic routing and configuration adjustments.

Autonomous operations

Real-time detection and resolution of failures.

Predictive maintenance

Early identification of hardware degradation to minimize disruptions.

AI Platform Development

The Path Forward

As AI adoption accelerates, it is increasingly clear that platform strategies cannot follow a uniform model.

The design and scaling of AI initiatives vary based on organizational factors, including size, digital maturity, risk posture, talent capacity, cultural alignment, and operational complexity resulting in distinct adoption pathways.

In practice, many organizations are navigating a three-part challenge that influences their pace of progress →

Strategic ambiguity around where AI creates the most value

Platform complexity driven by ongoing build-versus-buy decisions

Talent constraints that coincide with cultural and operating model shifts

The discourse around AI often swings between two ends of the spectrum: **day-to-day productivity gains** and **large-scale transformation.** Both matter, but they differ in mindset, investment horizon, and capability requirements. Incremental improvements offer immediate, visible benefits, while enterprise-scale Agentic AI requires a broader shift toward an AI-first operating model where autonomous agents coordinate processes across engineering, infrastructure, networks, and data.

A successful AI strategy must account for organizational scale, resource availability, technical complexity, and governance expectations.

While large organizations prioritize deep integration and scalable architecture, SMBs benefit from focused, outcome-driven adoption aligned to their operational realities.

Large Organizations

Large organizations require an AI architecture that embeds intelligence across the business through unified platforms, strong data foundations, and scalable multi-agent automation. Core priorities include integrating heterogenous systems, investing in proprietary models, and building orchestration layers that support reliable, enterprise-grade operations. Governance plays a significant role, ensuring security, compliance, and operational oversight. When executed well, this approach modernizes legacy environments, aligns cross-functional teams, increases efficiency at scale, and enables new business models and long-term competitive advantage.

Small and Medium-sized Organizations

SMBs benefit from a pragmatic, outcome-focused AI strategy tailored to resource and operational realities. Adoption typically begins with high-impact use cases like payroll, forecasting, scheduling, and customer support. Workflow assessments help identify priority areas across finance, support, marketing, and administration. Cloud-based AI tools, targeted skill development, lightweight governance, and focused pilots allow SMBs to achieve quick wins, validate ROI, and scale responsibly without the complexity required in large enterprise environments.

AI success is ultimately shaped by strategic clarity, execution readiness, and the ability to scale in alignment with organizational needs. Enterprises that ground AI investments in business priorities, develop the right talent and platform capabilities, and account for operational complexity are best positioned to unlock meaningful value, strengthen efficiency, and build sustainable competitive advantage.

TAKEAWAY

Agentic AI as a Strategic Imperative

Leaders in 2026 are navigating a convergence of considerations across strategy, platform, and talent. Fragmented platforms, evolving AI roadmaps, and limited specialized talent continue to slow progress, often confining organizations to pilots rather than scalable transformation. Many enterprises are therefore reassessing whether they are architecting for long-term scale or settling for incrementalism.

A forward path requires clarity across three areas:

ALIGN CULTURE WITH AMBITION

Equip teams to operate with an AI-first mindset and adopt new ways of working.

INVESTMENT BEYOND PROOFS-OF-CONCEPTS

Prioritize platforms and architectures that support scale, security, and operational consistency.

BALANCE NEAR-TERM GAINS WITH LONG HORIZON BETS

Incremental efficiency improvements remain essential, but enterprise-wide Agentic AI unlocks the structural value needed for future competitiveness.

Organizations that succeed with AI share a common mindset: a willingness to confront fragmented systems, surface hidden dependencies, and rewire operating models to be AI-ready. They invest deliberately in strong data foundations, integrated platforms, and process-aware automation, recognizing that intelligence must be embedded into how work happens. What differentiates leaders is not access to models, but commitment to readiness building the right talent, redefining roles, modernizing processes, and staying focused on measurable business value. These organizations treat AI as a capability to be operationalized, not a tool to be deployed.

In this new landscape, AI advantage belongs to organizations that are hungry to learn, disciplined in execution, and relentless about outcomes regardless of size, maturity, or legacy.

The real question isn't whether AI will disrupt businesses. It already has. Will you lead the disruption or be led by it?