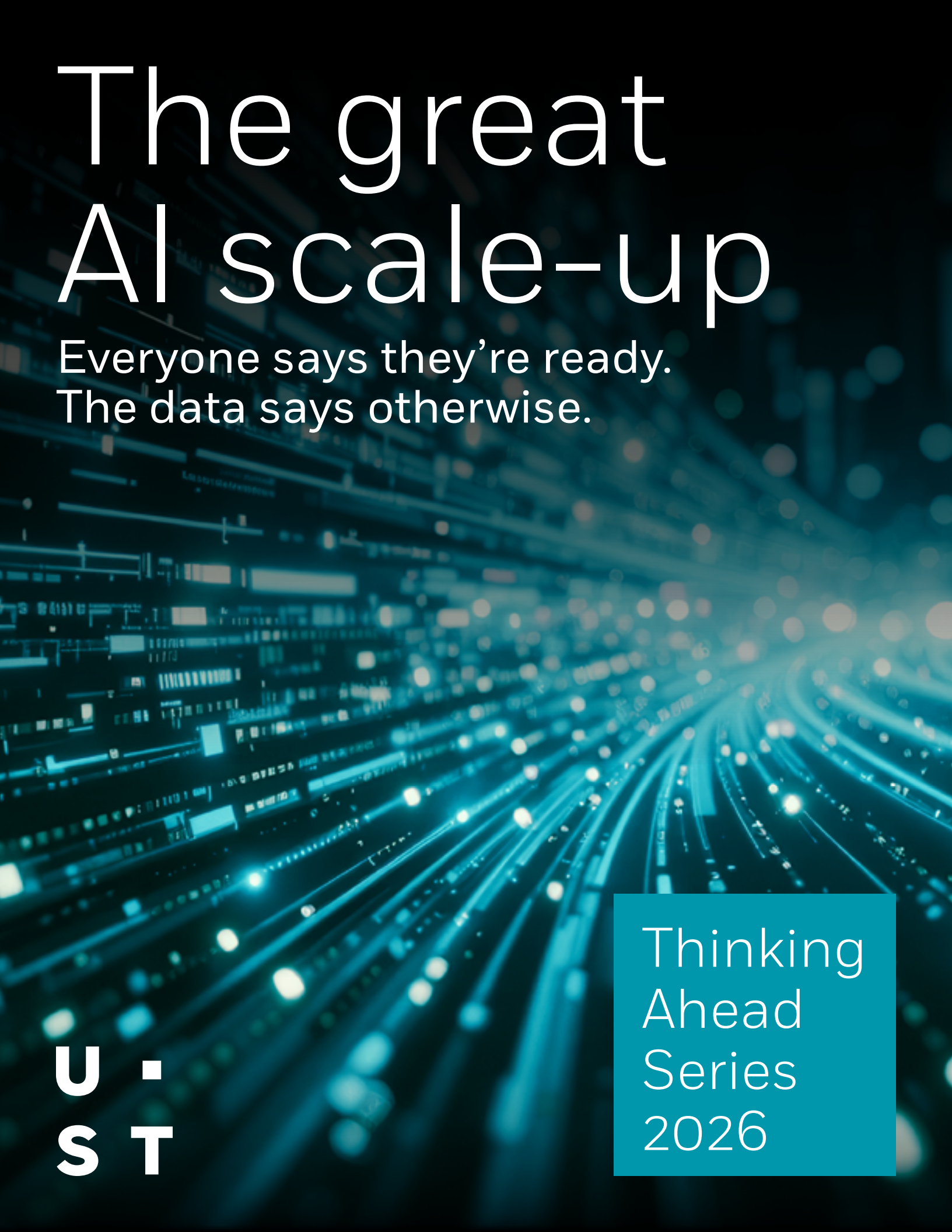
The great AI scale-up

Everyone says they're ready.
The data says otherwise.



Thinking Ahead Series 2026

U ▪ S T

Based on a global UST survey | 2026

FOREWORD

A leadership moment—bigger than “AI adoption”

Krishna Sudheendra,
Chief Executive Officer, UST

In every technology cycle, there is a point at which adoption stops being optional and becomes infrastructure.

Enterprise AI has reached that point.

The signals are loud: 90% of organizations are already piloting or actively scaling AI, and 86% feel very or fully prepared to extend it enterprise-wide. At the same time, leaders acknowledge the friction beneath the surface: data quality and availability (44%) and security and privacy (42%) are the top implementation roadblocks. When scaling across departments, the same blockers remain. And when leaders project forward to 2027, privacy and security dominate as the greatest risk (33%), with 70% very or extremely concerned about data privacy and consent.

This is the contradiction that defines 2026: confidence is high, foundations are uneven, and scale is accelerating anyway.

Organizations are moving because the competitive environment demands it. Leaders feel ready because readiness is measured relative to competitors who are also moving fast. In that race, perfect has become optional. But as AI touches more processes, weak foundations become amplified risks. What feels manageable in a pilot becomes dangerous at scale.

This report is written for leaders operating in that tension, leaders trying to balance speed with safety, innovation with governance, and ROI with trust. The goal is not to convince you that AI matters. You already know it does. The goal is to help you build the capabilities that enable AI to deliver in a repeatable, governed way, rather than a patchwork of pilots that break under pressure.

Confidence is not the same as readiness. And in AI, the gap between the two is where enterprise risk lives, something we also confront as we continue to transform and scale our own AI-led enterprise journey.

STUDY SNAPSHOT

This report synthesizes findings from a global survey fielded in January 2026, conducted by Hanover Research in partnership with UST.

510
Qualified respondents

3
Global regions: NA, Europe, APAC

Director+
Minimum seniority level

$500M+
Minimum company revenue

2,500+
Minimum FTE headcount

6
Industries represented

INTERPRETIVE NOTE

Survey data reflects what senior leaders believe and intend. Operational reality, particularly at the data, governance, and frontline adoption level, is often more complex. Both truths matter for strategy.

EXECUTIVE SUMMARY

The market is ready to scale. What it urgently needs are the governance, data confidence, and human enablement capabilities that transform speed into a durable competitive advantage.

Across North America, Europe, and Asia-Pacific, the picture is consistent: AI has crossed an organizational Rubicon. Nine in ten organizations are already piloting or scaling AI, and 86% feel prepared to extend adoption enterprise-wide. But preparedness is self-reported, and the same leaders who claim readiness also describe friction: data quality issues, security gaps, governance shortfalls, and a workforce still learning to trust AI-generated decisions.

Three central tensions define this moment.

- Competitive pressure is forcing adoption faster than readiness allows.
- Infrastructure confidence is masking real gaps in data quality and security.
- The next wave of advantage will not come from adopting AI. It will come from governing it.
- The organizations that crack that formula will own what comes next.

90%	Piloting or actively scaling AI
86%	Feel very/fully prepared to scale enterprise-wide
70%	Extremely concerned about data privacy & consent
44%	Name data quality as the #1 implementation barrier
33%	Say privacy/security is the greatest AI risk through 2027
70%	Expect 50%+ of core processes to be AI-assisted by 2027

CORE THESIS

The market is ready to scale. What it urgently needs are the governance, data confidence, and human enablement capabilities that transform speed into a durable competitive advantage.

THE PARADOX OF READINESS: CONFIDENT AT THE TOP, FRAGILE AT THE FOUNDATION

Ask a senior executive if their organization is ready to scale AI enterprise-wide, and the answer is almost always yes. What follows tells a more complicated story.

WHERE READINESS IS REAL

Across the study, many organizations have moved beyond technical experimentation into organizational embedding. The numbers are compelling:

- 71% embed AI in strategic planning
- 67% communicate a clear AI strategy to employees
- 65% provide formal training and upskilling programs
- 58% bring in external experts to accelerate deployment
- 85% say their data infrastructure is very or fully prepared for large-scale AI workloads

These are operating model statistics, not pilot metrics. AI has moved into the planning cycle, the budget process, and the governance agenda.

Readiness concentrates where budgets, policy maturity, and security talent already exist in larger organizations, among top executives, and in segments with formal governance infrastructure. The gaps are most pronounced in mid-size organizations, at the director and VP levels, and in regions where AI governance and security skills are still developing.

Key Insight

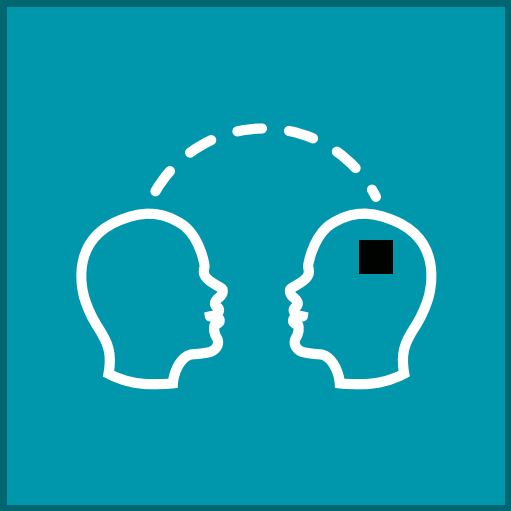
AI readiness is not a shared organizational capability. It concentrates at the top. That means frontline risk is higher than leadership dashboards suggest.

“I believe every company will be AI-driven, regardless of size or industry. If your data isn’t ready, your AI won’t be either. Clean and unbiased data is the foundation of ethical AI. Build the foundation first.”

Madhumita Bhattacharyya, Global Head of Analytics Group, UST.

THE 2027 FORECAST: WHEN AI TOUCHES HALF YOUR PROCESSES, EVERYTHING CHANGES

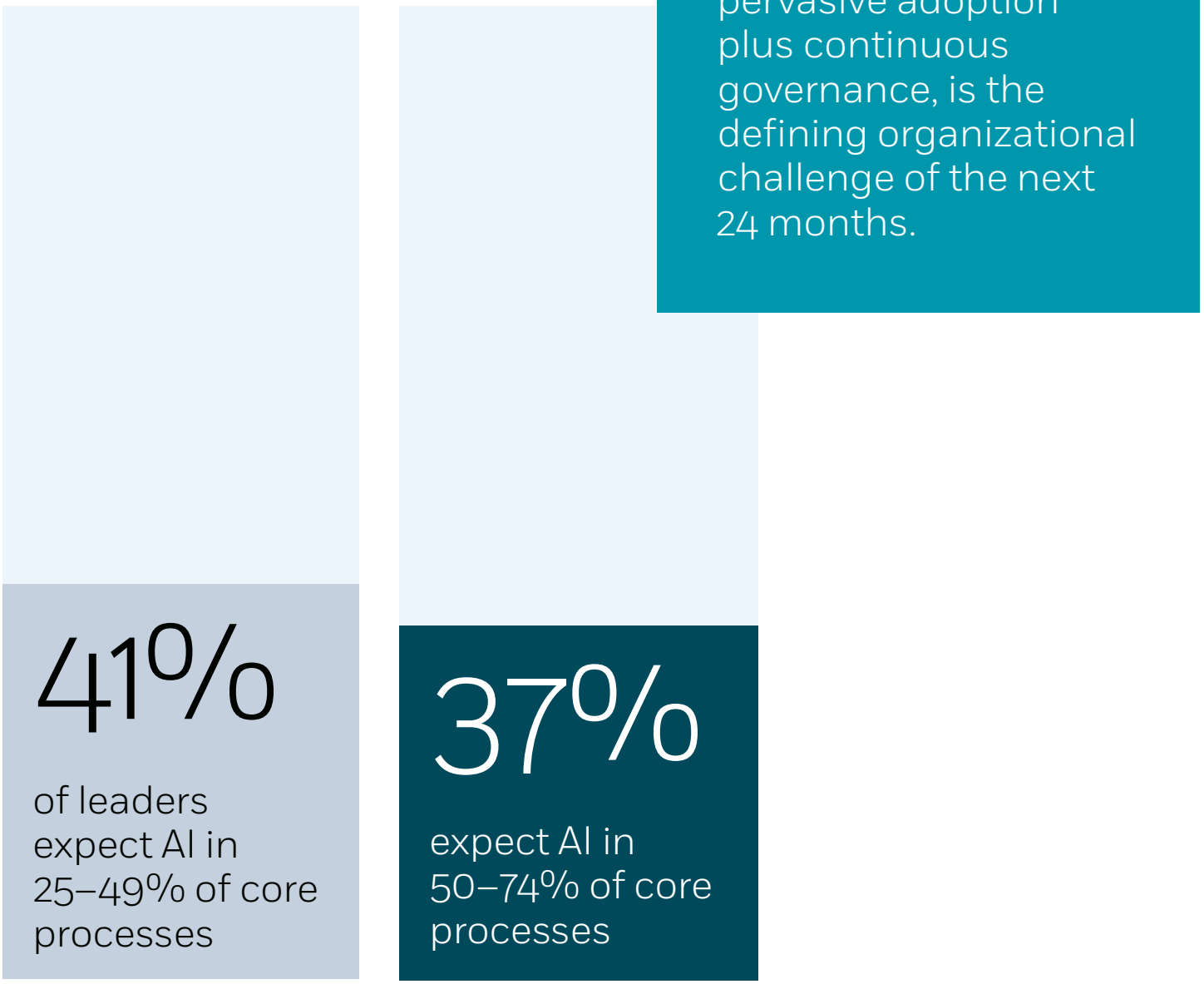
The survey's forward view is not timid. Leaders believe AI will "be deeply embedded in enterprise operations by 2027, and the numbers demand a strategic response.



THE QUESTION EXECUTIVES ARE ALREADY ANSWERING

2027 Mandate

Scale AI while building trust. That combination, pervasive adoption plus continuous governance, is the defining organizational challenge of the next 24 months.

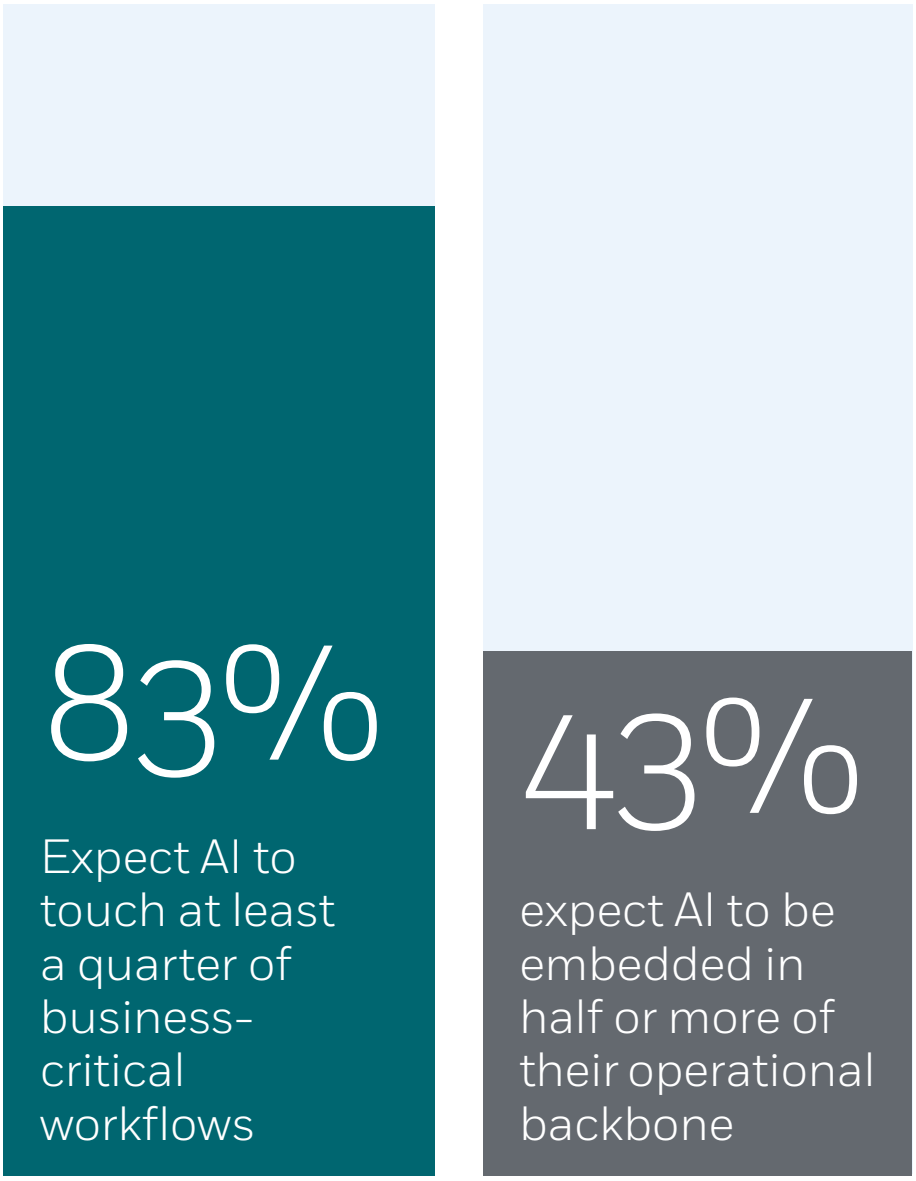


What share of our core processes will AI run by 2027?

Translation: AI will sit inside the engine room, not on the perimeter.

What this means at board level

(Same data — higher-stakes interpretation)



Executive Reality Check

Once AI touches half your processes, it is no longer “technology.” It is governance, risk, compliance,productivity, and reputation — all at once.

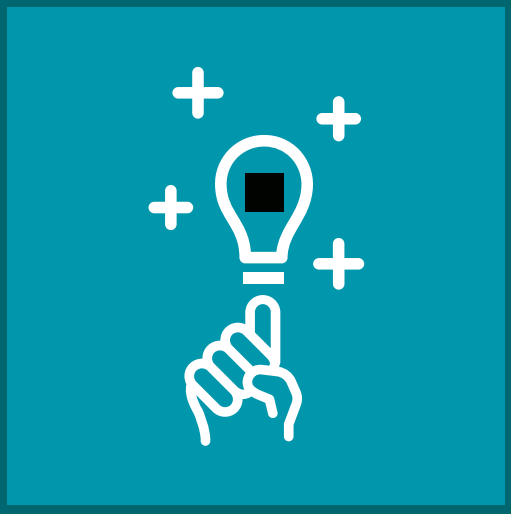
Organizations are no longer deciding *if* they will scale AI. They are deciding whether they will govern it deliberately. Or inherit the consequences.

“We are entering the age of machine labor, with enterprises shifting from buying software to embedding intelligence across the flow of work. Natural language is becoming the operating layer of the business, and AI becomes transformative when it is no longer treated as a tool but adopted as part of how work gets done.”

Adnan Masood, PhD.
Chief AI Architect. UST

FIVE MACRO-TRENDS QUIETLY REDEFINING ENTERPRISE AI

Five forces separating AI leaders from everyone still catching up.



1

Pilot pride is dead. Scaling is the default posture.

SIGNAL: 90% are piloting or scaling AI; only 10% remain in discovery/planning.

AI is no longer a differentiator; it's the baseline. The conversation has shifted from innovation to execution. Failures now look like breaches, compliance violations, and brand damage.

2

'Prepared Enough' has replaced 'Perfect'.

SIGNAL: 85% say data infrastructure is ready, yet data quality remains the #1 obstacle.

Leaders say they are ready; then describe why they are not. Infrastructure is in place. Data readiness is not. AI scaling fails not because models are weak, but because data is.

3

Privacy and security have become the gravitational center of AI risk.

SIGNAL: 42% cite privacy/security as an implementation challenge; 70% worry about privacy/consent; 33% name it the biggest risk through 2027.

Privacy tops concern lists. But only 28% have incident-response playbooks, 23% conduct adversarial testing, and 38% monitor continuously. Enterprises fear the risk. Few have built the muscle to manage it.

4

ROI is a multi-audience story, not a single number.

SIGNAL: Top ROI measures cluster across quality` (42%), cost (41%), revenue (39%), CX (38%), and productivity (34%). No single metric dominates.

ROI means different things to every stakeholder: same project, different audience, different scoreboard. AI value dies in PowerPoint when the metric doesn't match the room.

5

The human side is no longer 'Change Management.' It is an adoption engine.

SIGNAL: 90% say AI improved team collaboration; 71% say AI improves decisions; organizations actively invest in training, policy, and involvement.

Leaders aren't crediting luck. Training, policies, frontline inclusion, and sandbox environments are driving gains in collaboration. Human-AI collaboration has become a design decision, not a byproduct.

LEADERSHIP PERSPECTIVE

From attention to trust: Why the real scaling gap is cultural, not technical

Tim Sanders
Chief Innovation Officer, G2

Leadership Perspective

The data surfaces the gap. But understanding why it persists requires a different lens, one that goes beyond data pipelines and governance frameworks into the human psychology of trust. Tim Sanders, Chief Innovation Officer at G2, offers that lens.

Tim Sanders isn't worried about whether enterprises will buy AI agents. They already are. He's worried they won't use them because they don't trust them. And in his view, that trust gap is the single biggest drag on enterprise value creation in the AI era.

What's emerging, Tim argues, is a fundamental shift from the attention economy to the trust economy. For years, businesses won by capturing attention: buyers', customers', and markets'. But AI agents change the stakes entirely. When software can act rather than suggest, the risk-reward multiplier goes up dramatically. And the limiting factor becomes trust.

The horse and the engine

To explain why this matters, Tim reaches for history. When the U.S. Postal Service first began moving from horse-drawn carts to motorized vehicles, drivers were slow even to turn the ignition key. They trusted the horse. They feared the engine backfires, fires, and horror stories. The result: a multi-year adoption lag despite obvious benefits.

Tim sees the same dynamic today. Independent developers in open-source communities will happily let agents run with minimal guardrails, risk-tolerant experimentation at speed. Enterprises do the opposite: they invest heavily, then restrict agents to "safe" behavior, opening tickets, making suggestions, and creating drafts. In his words, many agents are still glorified ChatGPTs because the organization won't trust them with autonomy.

Why mandate adoption fails

So, what breaks the logjam? Tim's answer is uncomfortable for executives: AI adoption cannot be top-down only. Most companies do what he calls "mandate adoption"—write big checks, send memos, announce new tools. Then the workforce, outside of a few functions, ignores it. The gap between executive enthusiasm and rank-and-file behavior becomes the real scaling blocker.

> "The rich/poor gap of the AI era won't be defined by budgets or talent. It will be defined by leaders who close the trust gap between what AI can do and what the organization will actually allow it to do."
>
> – Tim Sanders, Chief Innovation Officer, G2

Tim offers a practical definition of true adoption: not having an AI tab open but actively using AI as part of work, four hours per week for non-technical staff, eight hours for technical staff. By his estimate, many organizations are nowhere close.

Enterprise scale, in his framework, requires three forces working together: leadership (to remove bottlenecks and model the behavior), the lab (a center of excellence that runs an experimentation factory), and the crowd (mass participation across the organization).

Start with the problem, not the tool

On execution, Tim flips the common playbook: don't start with the AI tool you love and hunt for problems. Start with the business choke points that block your plan, then reframe them as prediction problems. That's where AI excels.

On risk: Fear sells, but bias is the real problem

Tim is clear-eyed about risks and deliberately contrarian. We exaggerate AI dangers, he argues, because fear sells and because humans have always distrusted machines. That distrust acts as a natural brake against reckless adoption, which is not entirely a bad thing.

The real safety risk, in his view, isn't AI taking over. It's bias amplification, machines scaling the bias already embedded in data.

His advice to peers

Tim's final guidance to fellow leaders is direct: be a student of the game. Put your hands on the wheel. Leaders must use AI themselves, not delegate it to a team and wait for the briefing. And make AI a standing agenda item in meetings, with a focus on business outcomes rather than time saved.

Adoption Test

True adoption isn't having an AI tab open. It's actively using AI as part of daily work: 4 hours per week for non-technical staff and 8 hours for technical staff. Most organizations are nowhere close.

> "Scaling AI means your culture becomes AI-first: when a problem appears, the first instinct is to ask—can AI solve it?"
>
> – Tim Sanders, Chief Innovation Officer, G2

RESPONSIBLE AI: THE MATURITY LADDER MOST ORGANIZATIONS HAVE NOT CLIMBED

Most organizations have begun responsible AI governance. The opening moves are common. But the depth of governance is inconsistent and often stops at the foundational layer precisely when the risk environment demands more.

Level 1
Foundational Guardrails
Common

- Data audits & quality assessments
- Privacy/security controls at project launch
- Written ethical AI principles/policies

58–65%
adoption

Level 2
Repeatable Oversight
Emerging

- Regular AI audits & risk assessments
- Role-based training on responsible use
- Standard documentation & approvals

40–44%
adoption

Level 3
Continous Assurance
Rare

- Continuous bias/ safety/performance monitoring
- Incident-response playbooks for AI failures
- Red team/adversarial testing

23–38%
adoption

The mismatch that matters: privacy and security are the top concerns and the top future risks, yet incident response and adversarial testing are among the least-adopted practices.

Responsible AI is not a policy you publish. It is a capability you run every day. Most organizations have the policy. Very few have built the operational muscle.

LEADERSHIP PERSPECTIVE

AI is a pattern thinker. Humans are the brake pedal.

Vince Fattore
CIO, RoadSafe Traffic Systems

Leadership Perspective

The friction points of the data surfaces are real. But in some industries, they are not just operational inconveniences; they are life-safety imperatives. Vince Fattore, CIO of RoadSafe Traffic Systems, operates in exactly that environment: 28 states, 91 locations, and a workforce where one bad AI-informed decision does not show up as a process error. It shows up as an incident report.

Vince Fattore doesn't talk about AI as a tech trend. He talks about it as a force multiplier for a business that literally lives on the edge of risk, where one bad decision can cost money, equipment, or lives. RoadSafe operates across 28 states with 91 locations, supporting everything from highway pavement marking to traffic control and signage. The stakes are high, the assets are expensive, and the work is physical. That context shapes Vince's AI philosophy: move forward but never remove the human checkpoint.

For Vince, the motivation is straightforward: AI promises speed, accuracy, scalability, and efficiency, plus better customer experiences and sharper decision-making. But he adds a caution many leaders avoid saying out loud—AI also introduces new safety concerns. His shorthand is memorable: AI is a pattern thinker. It can propose the best course of action, but it can also drift, especially if two AIs are talking to each other and no one is watching. Humans are not being erased; they are being repositioned as overseers, trainers, and validators.

Where AI meets the physical world

Where does Vince see the most immediate impact? E-commerce—RoadSafe runs multiple customer portals where AI can guide buyers to the right products faster, improving accuracy. But the bigger opportunity is where AI intersects with the physical world: engineering road design, optimizing safety measures, and orchestrating construction workflows. He paints a vivid image of the future: movable barriers and construction crews moving in sequence "like a ballet," coordinated by AI-informed traffic studies and predictive modeling. The result - faster work, fewer shutdowns, and safer outcomes for crews and drivers alike.

Then there is safety; the most visceral AI use case Vince describes. RoadSafe uses AI-enabled cameras inside and outside truck cabs to analyze driving behavior and environmental conditions. The system flags high-risk moments, such as hard braking and speeding beyond what the vehicle and environment can handle, and triggers early intervention. A manager can switch drivers before an incident happens.

In an industry where a truck can cost a million dollars, and downtime means lost revenue, predictive safety is not just about protection. It is an operational strategy.

ROI is real but slow. Start small anyway.

Vince is clear-eyed about the barriers. ROI is real but slow. It is hard to prove dollars back quickly when benefits show up as fewer injuries, fewer maintenance events, and lower claims over time. That is why RoadSafe takes a small-steps approach: targeted projects first, consensus next, scale later. His planning horizon is pragmatic, six months to a year to validate a focused use case, and far longer if you try to overhaul everything at once.

He also calls out what many enterprises are still learning the hard way: AI governance is a moving target. Unlike SOC 2 or HIPAA, there is no mature, universally adopted AI governance playbook yet. Standards are emerging, but the operating reality is still in its early stages. His answer is not to wait for perfection. It is to build internal controls: cross-functional adoption committees, trusted champions, ethical guardrails, and relentless communication.

On security, Vince does not sugarcoat it: it is a black hole—expensive, complex, and unavoidable. His advice is blunt: start security from day one. Encrypted storage and transport, version control, audit logs, and data segregation, because retrofitting later will cost another six to twelve months.

Finally, Vince rejects the most common fear narrative: AI will not erase physical labor. It cannot paint lines on highways. Not yet. In his view, AI changes the mix: more productivity, more transparency (especially in government contracting), and a workforce that must be continuously educated, from the field to the executive suite.

> "Start small, secure early, educate constantly, govern cross-functionally—and never confuse AI's pattern detection with human judgment."
>
> – Vince Fattore, CIO, RoadSafe Traffic Systems

THE TWO-ACT VALUE STORY: EFFICIENCY TODAY, REINVENTION TOMORROW

Enterprise AI is already delivering measurable value, but the nature of that value is changing. Understanding the distinction between Act 1 and Act 2 is essential for any leader in building a multi-year AI strategy.

Act 1: AI as an efficiency engine

The dominant driver today is clear. Operational efficiency drives AI investment (60%), followed by productivity gains (54%), customer experience (54%), and cost savings (44%). Strongest returns: customer service (58%), IT and cybersecurity (56%), finance (54%), data and analytics (54%), marketing (52%), HR (50%). IT leads because it already owns the conditions AI needs to work.

Act 2: AI as a strategic growth engine

Leaders already anticipate a pivot over the next three to five years. 60% expect AI to support sustainability and ESG goals; 58% expect new business models and revenue streams; 58% expect workforce roles to transform; 52% expect enhanced strategic decision-making; and 52% expect personalization capabilities to increase significantly.

This is AI as reinvention, but risk lurks in the gap between Act 1 and Act 2.

Act 1 Insight

AI accelerates structured work first. IT/cybersecurity is the beachhead and the proving ground for governance patterns that will scale across the enterprise.

Strategic Mindset

Efficiency is the entry ticket. Reinvention is the prize. The leaders who build Act 2 capability while pursuing Act 1 wins will own the next competitive cycle.

LEADERSHIP PERSPECTIVE

AI isn't a strategy. It's a force multiplier for the strategy you already have.

Yogaraj "Yogs" Sayaprakasam
SVP, Chief Technology & Digital Officer, Deluxe

Leadership Perspective

The data describes the two-act structure. But what does it actually look like to navigate both acts simultaneously in a 110-year-old company, mid-transformation, under real competitive pressure? Yogaraj 'Yogs' Sayaprakasam, Chief Technology & Digital Officer at Deluxe, has the answer.

Yogs Sayaprakasam has a refreshingly unglamorous take on AI: stop treating it like a separate moonshot. If you're doing it right, AI shouldn't sit on its own budget line as a science project. It should show up within the initiatives your business must deliver anyway, such as modernization, efficiency, customer experience, risk resilience, and growth.

That mindset matters at Deluxe, a 110-year-old company transforming itself from a legacy check printer into a modern payments and data business. The pivot is real and measurable: payments and data grew from about 30% of revenue in 2019–2020 to over 50% today, while the print side has declined. Under the hood, the company did the hard work that makes AI possible: moving to a hybrid cloud foundation, shifting toward microservices, and reducing sprawling complexity, cutting applications from 1,400 down to 600. Yogs calls the architecture "Sci-Fi": secure, composable, intelligent, frugal, in the cloud.

Here is the key: Deluxe did not bolt AI onto an old operating model. They modernized the operating model and then used AI to accelerate what had been painfully slow.

The three-lane AI strategy

Yogs frames Deluxe's approach as "Execute with AI," organized into three lanes that force AI to earn its place by serving a concrete outcome:

- AI for tech — improving software delivery, modernization, and engineering productivity
- AI for business — helping support functions like legal, sales, and marketing work smarter
- AI for customer — embedding AI into revenue-generating products and customer experiences

> AI is not a science project; we only do AI when it creates material value. That principle turned a 25-year modernization dead-end into a measurable win.
>
> –Yogs Sayaprakasam

A proof point that feels like science fiction but isn't

The most striking example is the retirement of Comet, a mainframe system that had been running for over 50 years. Deluxe had tried to decommission it decades earlier and failed. Documentation was missing; subject-matter expertise had evaporated, and the risk of conversion was too high. This time, Yogs ran a small experiment with partners, using large language models to convert legacy code into modern code without relying on human interpretation of ancient logic. Once the experiment proved viable, the company committed and successfully decommissioned Comet.

The metric most leaders miss: Value capture vs. value leakage

Yogs offers one of the sharpest ROI lenses in this report: AI value is not just what you gain; it is what you accidentally give back. Automate the call-center workflow with AI, and you might reduce handle time, only for compliance costs to spike as you now need more monitoring. The question becomes: are you capturing value or leaking it? The only decision that matters is net value after controls; oversight, and risk costs are factored in.

What keeps him up at night

For Yogs, the biggest wild card is not technology; it is regulation and compliance. AI is moving faster than enforcement frameworks can keep pace with. The second fear is the convergence of cybercrime and fraud, in which AI-enabled attacks blur the lines between security incidents and financial manipulation. His response is governance that matches the speed of change: defensive tool controls, plus a joint operating model spanning technology, finance, HR, legal, and business, anchored in frameworks like NIST, model governance, and continuous monitoring.

On the human impact, Yogs does not buy the "humans are obsolete" narrative. His view is more nuanced: entry-level roles shrink first, while roles requiring judgment, domain expertise, and human skills become more valuable. The organizational challenge is severe. Past tech shifts took 5 to 10 years; AI compresses disruption into 18 to 30 months. That is why he is proactively partnering with HR to pair early-career talent with mid-career domain experts, fast.

His final advice to peers: prioritize learning, even when time is scarce. But learning is not enough. The modern technology leader's job is also to shape the narrative to explain AI in the language of the CFO, the CEO, the board, and customers. And yes, he uses AI to sharpen that story, debating with it before walking into the room.

"AI won't save businesses that lack strategic clarity. But for leaders who have done the hard work, AI becomes a multiplier; modernizing the past, accelerating the present, and reshaping how value is captured and protected in the future."

–Yogaraj 'Yogs' Sayaprakasam, CTDO, Deluxe

THE HUMAN-AI COLLABORATION ADVANTAGE: ENGINEERING TRUST AT SCALE

One of the most striking findings in this research is also one of the most hopeful: AI is improving human collaboration, not damaging it.

Ninety percent of leaders report that team collaboration has improved; 71% say AI insights improve decisions; 60% say routine task accuracy has improved; and 54% say they have more time for higher-value work.

The organizations reporting the strongest collaboration outcomes are those that have invested deliberately in the human side of AI adoption.

What intentional enablement looks like

- Open dialogue about AI use across the organization (58%)
- Involving employees in use-case design from the start (56%)
- Role-specific training that positions AI as a helper, not a replacement (56%)
- Explicit framing of AI as augmentation, not elimination (48%)
- Acceptable-use policies that set clear boundaries (51%)
- On-the-job tool training in real workflow contexts (48%)
- AI literacy programs that build judgment, not just skill (46%)
- Incentives tied to adoption and quality outcomes (45%)
- Sandbox environments for safe exploration (40%)

The safest AI is AI with trained humans in the loop. Not as a slogan. As a workflow design requirement built into every deployment.

LEADERSHIP PERSPECTIVE

From systems of record to systems of action

Bianca Buckridee
VP of Product Marketing, Infios

Leadership Perspective

The research describes what intentional enablement looks like in aggregate. Bianca Buckridee, VP of Product Marketing at Infios, describes what it looks like in the room—in a sector where the stakes of getting human-AI collaboration wrong are not abstract. Disrupted shipments missed delivery windows, and frontline workers who do not trust the system to recommend their next action.

Bianca Buckridee has a blunt read on where enterprise AI is headed: the winners will not be the companies that simply add AI. They will be the ones who redesign how decisions get made when the world changes fast.

Infios is building what Bianca calls a new category in supply chain execution: not planning based on historical averages, but responding in real time to disruptions. Wildfires. Snowstorms. Tariffs. Geopolitical instability. Viral demand spikes. In her world, those are not edge cases; they are the operating environment. And when disruption occurs, three systems matter most: order management, warehouse management, and transportation management. Execution is no longer the back half of the process. It is the moment of truth.

When Bianca joined, Infios had just unified multiple companies into a single brand. Instead of letting strategy drift, she did something many leaders avoid: she manufactured alignment through friction. She locked everyone in a room for three days, innovation, product, marketing, and customer success, and forced clarity on mission, vision, product strategy, and innovation. Mergers create cultural seams; AI amplifies them. Her approach was to surface tensions early, then convert them into a shared narrative.

Intelligence is connectivity, not a feature

Her answer to "what does AI mean for supply chain" is precise: intelligence is not a feature—it is connectivity. If something is intelligent, its systems talk to each other, feed each other, sense change, and recommend action. That is why Infios is racing to deploy agents—not to become an AI company, but to be an

> The human-in-the-loop aspect is really, really important. AI can recommend. Humans must judge and act.
>
> –Bianca Buckridee

AI-enabled company where both customers and employees benefit.

Inside the organization, Bianca describes AI as a signal amplifier. Product marketing sits at the crossroads of competitive intelligence, customer usage data, product feedback, and field realities from sales and customer success. The job is to separate noise from truth, and AI helps synthesize what matters faster. But she draws a hard line: human-in-the-loop is not optional. Infios validates use cases with customers, measures workflow intent versus impact, and uses an AI council to set parameters and checkpoints for responsible development.

The hardest barrier is culture, not technology

The toughest barrier Bianca has encountered is not technology; it is culture. In the supply chain, there is deep hesitancy about automating people out of the job, from truck drivers to frontline operations. Her change-management approach is over-communication and real-life examples: show employees how AI levels up their skills rather than erasing them.

She is equally direct about what the next decade demands: judgment and accountability. As AI-generated content floods the market, customers increasingly expect human-reviewed work tailored to real pain points, especially as sustainability and transparency pressures rise around carbon footprint, shipping methods, and sourcing. On security, her stance is enterprise-grade: layered security, encryption at rest and in transit, rigorous vendor evaluation, minimized data movement, and architectural resilience.

Bianca's biggest strategic advice flips the common AI playbook: scale from outcomes, not use cases. Start with the business result you want, work backward to friction points, then select tools and workflows. And the leadership trait she believes will separate those who keep pace from those who fall behind is the willingness to create constructive friction to ask the hard questions, advocate for humans, and refuse to stay silent under pressure.

> "People need to get comfortable creating constructive friction. Ask the hard questions. Advocate for humans. Don't stay silent under pressure."
>
> –Bianca Buckridee, VP Product Marketing, Infios

REGIONAL AND INDUSTRY SIGNALS: THE SAME PLAYBOOK WILL NOT WORK EVERYWHERE

The survey reveals meaningful regional and industry differences that have direct implications for how AI strategy should be sequenced, communicated, and governed across markets.

Asia-Pacific: Cost discipline and ROI focus

APAC organizations are significantly more likely than their European and North American counterparts to cite cost and budget constraints as a primary challenge. They also report stronger use of acceptable-use policies and on-the-job tool training. The interpretation: APAC is optimizing for ROI discipline, scaling what works with tighter financial constraints and a pragmatic, policy-first approach to governance.

North America: Scale ambition and governance investment

North American organizations show the highest expectations for process coverage by 2027, with a greater likelihood of expecting 50–74% of core processes to be AI-assisted. They report stronger adoption of privacy controls and formal governance frameworks. The posture is aggressive, but so are the compliance and security investments that accompany it. Competitive pressure is the dominant force.

Europe: The trust and governance frontier

European organizations are comparatively less likely to communicate AI value by aligning it with strategic goals and exhibit lower levels of certain collaboration framing. In regulated contexts, which define much of the European enterprise landscape, AI success may depend more on trust-building, governance clarity, and strategic communication than on deployment speed. This is not a deficit; it is a different priority structure that the market will eventually recognize as prescient.

Industry signal: Automotive leads on readiness and responsibility

Automotive respondents stand out: 92% feel prepared for enterprise-scale AI—higher than the manufacturing and medical cohorts —while simultaneously expressing the greatest concern about human oversight and workplace equity impacts. This pairing makes sense. Automotive lives closer to physical risk, safety liability, and complex systems. When the consequences of AI failure are tangible and immediate, governance matures faster because it has to.

The same framework will not work for all geos. AI scales locally before it scales globally, and the sequencing of governance, cost, trust, and speed varies significantly by market.

LEADERSHIP PERSPECTIVE

Think big, start small: A CIO's blueprint for scaling AI with trust

Nabil Abdallah
CIO, Alspec

Leadership Perspective

The six-step playbook above is a framework. What it looks like executed inside a real business, under real cost pressure, with real ecosystem complexity, is something else. Nabil Abdallah, CIO of Alspec, offers that ground-level view: an enterprise AI story where governance is not a constraint on speed. It is the reason speed is possible.

Nabil Abdallah doesn't describe AI as a shiny upgrade. He frames it as a strategic capability built under pressure, pressure to move faster, operate leaner, and still outperform on customer experience. In his view, the AI moment arrived not because it is trendy, but because the business reality demanded it: do more with less, reduce manual burden, and accelerate decisions without sacrificing trust.

For Alspec, operating at the intersection of vendors and end customers, the urgency comes from both sides. Customers are asking for smarter, faster outcomes: predictive inventory management, faster quoting, and more personalized support. Meanwhile, vendor partners are embedding AI into their own offerings, raising the bar for Alspec not only to sell AI-enabled solutions but also to support and scale them responsibly. AI becomes the connective tissue across the ecosystem: better forecasting, better service, better security, better decisions.

What 'early success' actually means

Nabil is clear: early success is not "we launched a chatbot." Early success is measurable impact plus cultural traction. He points to workflow improvements where AI reduces processing time through real-time support and emphasizes something many organizations miss. Confidence and adoption are part of the ROI. If teams do not trust the outputs or understand the guardrails, the technology does not scale. For him, success includes building comfort, trust, and a continuous-innovation mindset.

Where does he see the fastest impact? In the operational core and the commercial edge. On the inside: demand forecasting,

> AI is not a science project. We only do AI when it creates material value, and confidence and adoption are part of that value. If teams don't trust the outputs, the technology doesn't scale.
>
> –Nabil Abdallah

repetitive back-office automation, logistics, and pricing accuracy. On the outside: lead qualification and consultative selling fueled by AI insights. The goal is not to replace people, it is to refocus human energy toward higher-value work. Faster deal cycles, fewer stockouts, and higher customer satisfaction are proof that AI is not just running. It is delivering.

Governance as a growth enabler

If the opportunity is big, the risks are bigger. Nabil's stance is excited and cautious. He flags the realities enterprises often underestimate: information validity, data security, user trust, and cost management. In his world, governance is not paperwork; it is the structure that prevents AI from becoming an uncontrolled expense or a compliance incident waiting to happen. He is explicit about the threat of shadow AI and runaway cloud costs, and responds with centralized oversight to monitor usage, evaluate ROI, and align investments to outcomes.

His first moves focus on trust: a tailored governance framework spanning IT, legal, and business owners; clear responsibility and oversight; and a practical approach to data quality, using AI to vet, organize, and archive data rather than relying on manual cleanup. He draws a sharp line between analytical data used for decision-making and documents assessed for usability, and pairs it with strong access controls, data classification, and monitoring.

The human-AI collaboration story is already tangible at Alspec. Tools like Copilot are compressing tasks that once took 15 to 20 minutes into two: meeting prep and document summarization, insight surfacing, and visualizations. For Nabil, this is how adoption becomes real: people feel the time back, then start trusting the tool. And when he looks ahead, he does not just see automation. He sees agentic AI, digital agents interacting with other agents and systems to orchestrate workflows like production planning and procurement, with humans maintaining oversight and strategic control.

> "Value first, trust always, governance as a growth enabler and culture as the scaling engine."
>
> –Nabil Abdallah, CIO, Alspec

The leadership action agenda: Five imperatives for 2026

01

Stop calling it 'Data Readiness.' Start building data confidence.
Data quality/availability is the #1 barrier, in pilots and at scale.

02

Treat privacy and security as the backbone, not a gate.
Privacy/security is both the #1 operational challenge and the #1 risk through 2027.

03

Upgrade responsible AI from principles to operations.
Most firms have Level 1 guardrails. Level 3 continuous assurance is where protection actually lives.

04

Institutionalize human-AI enablement as a standard delivery workstream.
Adoption gaps and variability in collaboration will widen without systematic enablement.

05

Build the multi-audience ROI story before the second wave arrives.
ROI fragmentation will stall investment momentum unless the narrative is translated now.

CLOSING: THE NEXT AI WINNERS WILL LOOK BORING—AND THAT IS THE POINT

The five imperatives are not a checklist. They are the operating conditions that determine whether AI delivers on the confidence leaders have already expressed. Data confidence, embedded security, continuous governance, and human enablement are the minimum viable infrastructure for the scale 43% of organizations expect by 2027. Leaders who treat them as urgent will own what comes next. Leaders who treat them as aspirational will watch others pull ahead.

The early era was defined by ambition. The next will be defined by machinery. The winners will not have the most advanced models. They will have built the boring infrastructure before they needed it.

The question is no longer 'Are you using AI?'

It is 'Can your organization govern it, secure it, and prove its value when it matters most?'

That answer will separate the leaders from the rest.

About UST

Since 1999, UST has worked side by side with the world's best companies to make a powerful impact through transformation. Powered by technology, inspired by people, and led by our purpose, we partner with our clients from design to operation.

Our AI solutions, proprietary platforms, engineering, R&D, products, and innovation ecosystem turn core challenges into impactful, disruptive solutions. With deep industry knowledge and a future-ready mindset, we infuse expertise, innovation, and agility into our clients' organizations—delivering measurable value and positive lasting change for them, their customers, and communities around the world. Together, with 30,000+ employees in 35+ countries, we build for boundless impact—touching billions of lives in the process.

UST THINKING AHEAD SERIES
Connecting research to strategy.
Turning insight into advantage.

Series Contributors

Jasjit Bhagat
Dennis Constantinou
Bambi Majumdar
Sonal Parmar
Lucas Warren

ust.com

Together, we build for boundless impact.

U · S T

AI Solutions | Platforms | Engineering