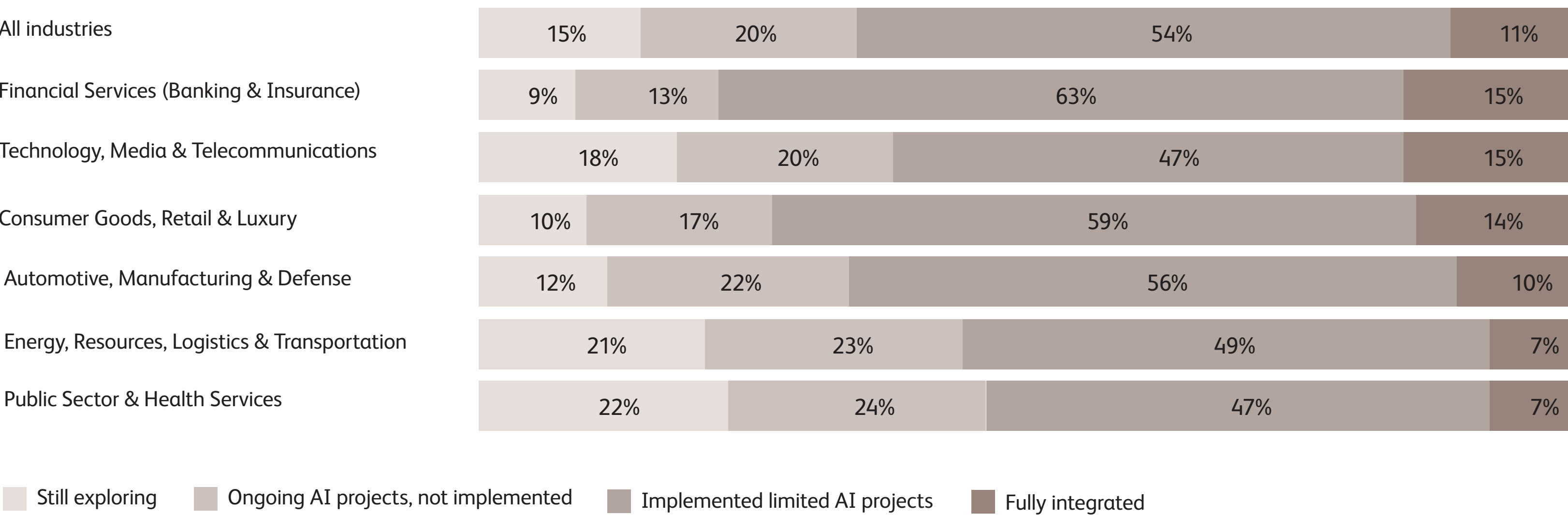


AI delivers value, but only 13% of organizations scale it as planned

The pace of AI adoption varies considerably across industries

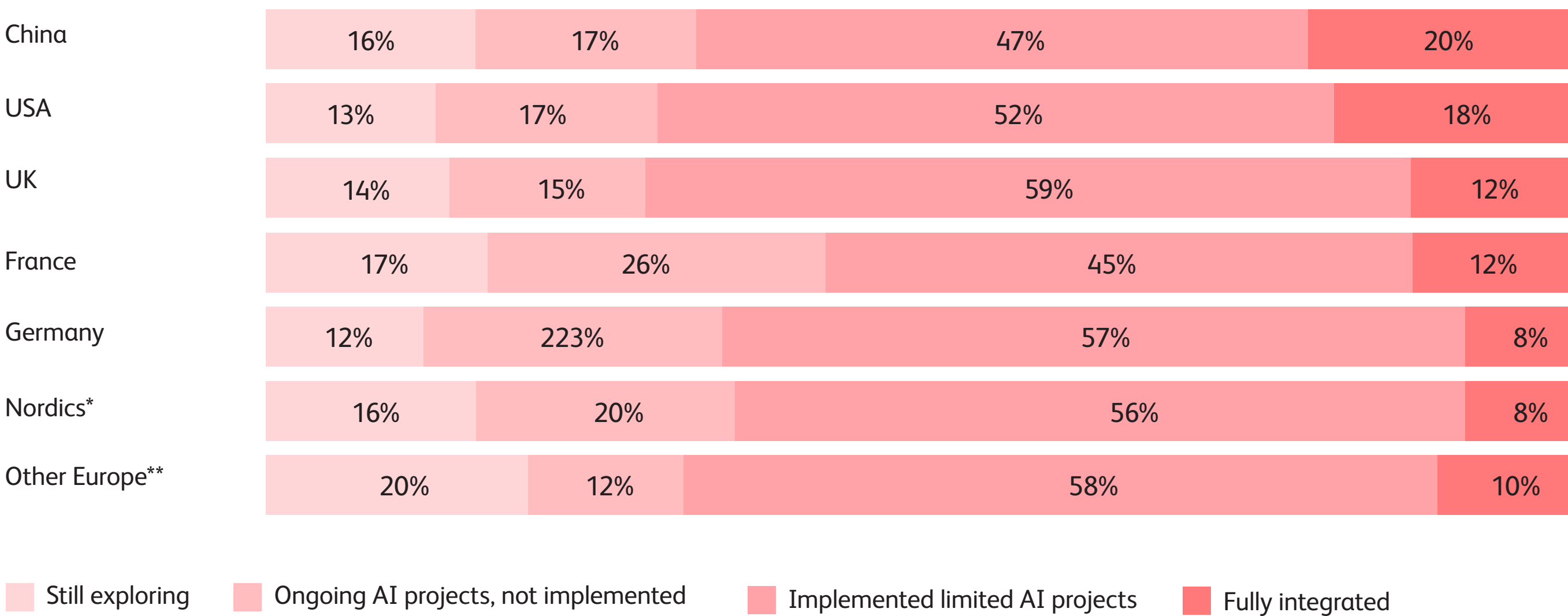
SHARE OF ORGANIZATIONS BY AI MATURITY STAGE, BY INDUSTRY



Nearly half of Public Sector & Health organizations remain stuck exploring or piloting AI (47% combined), more than double the share in Financial Services (22%) reflecting a widening gap between early movers and laggards as maturity accelerates.

China and the US lead in full AI integration

SHARE OF ORGANIZATIONS BY AI MATURITY STAGE, BY COUNTRY

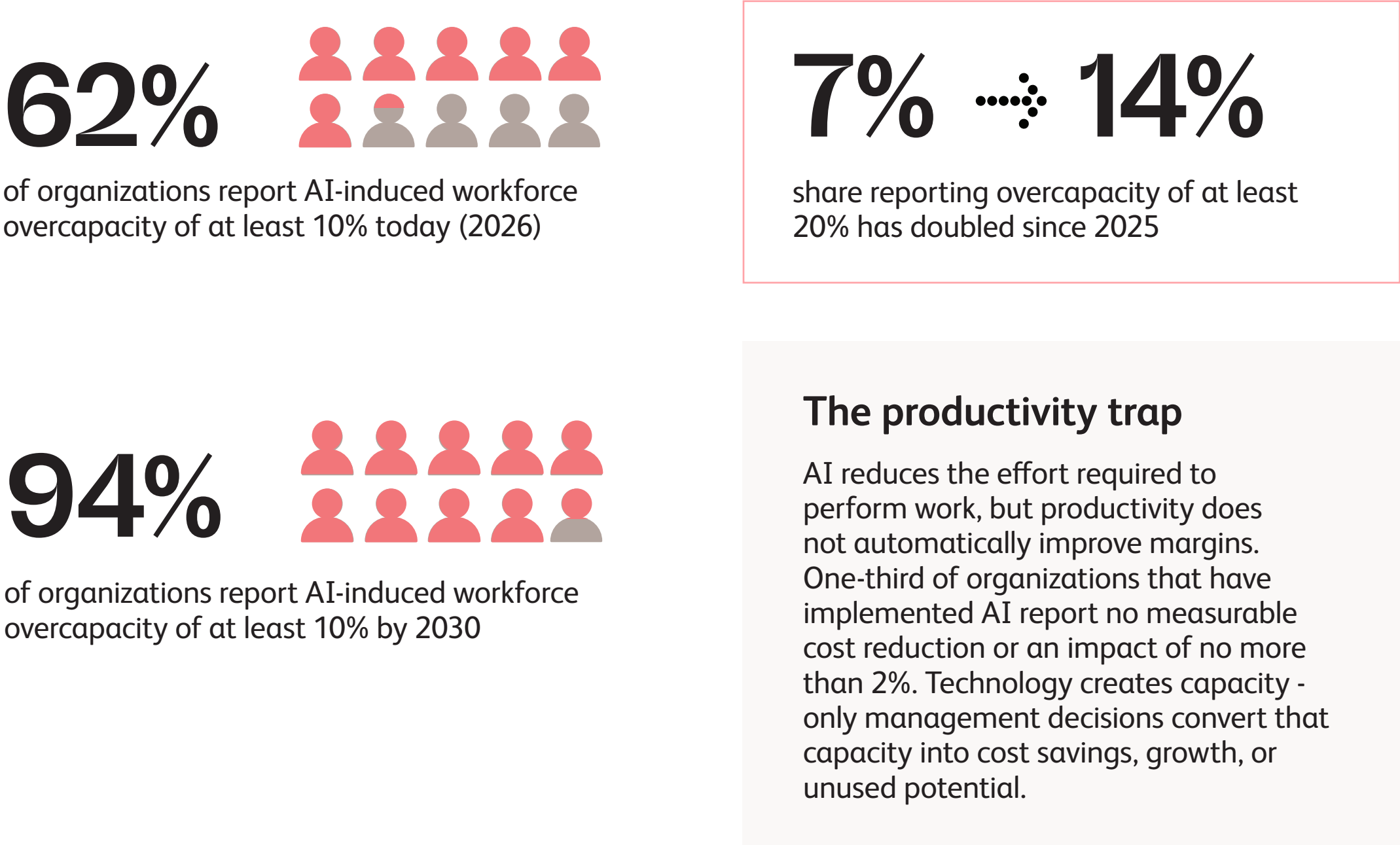


*) Nordics = Finland, Norway, Sweden.
**) Other Europe = Austria, Ireland, Italy, Netherlands, Switzerland.

The race to scale AI is creating regional frontrunners. China and the US lead in full AI integration, while many European organizations remain in the implementation phase.

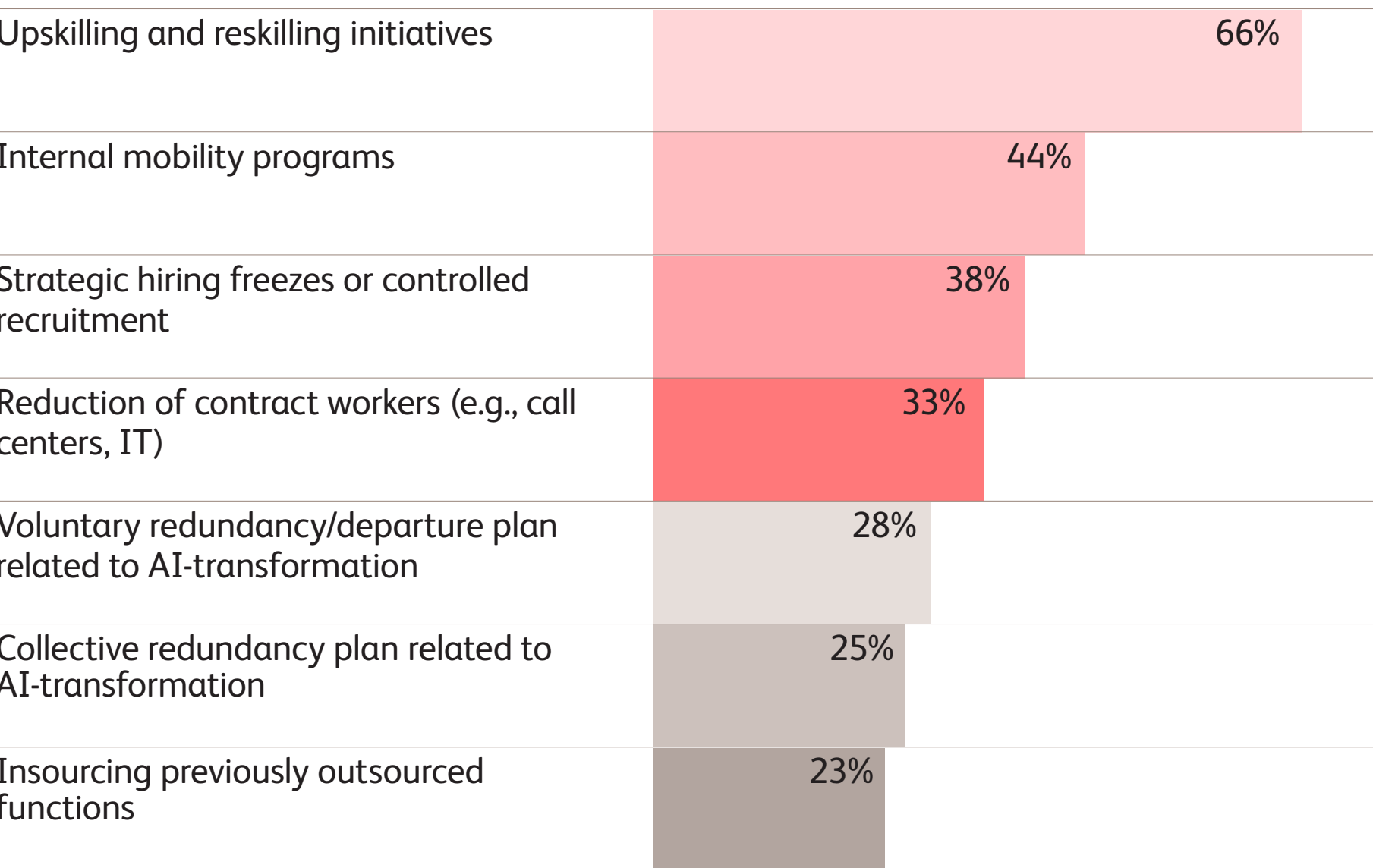
Workforce imbalances are outpacing organizations’ ability to adapt

ESTIMATED AI INDUCED WORKFORCE OVERCAPACITY, TODAY VS 2030



Upskilling and reskilling is the leading response to workforce overcapacity

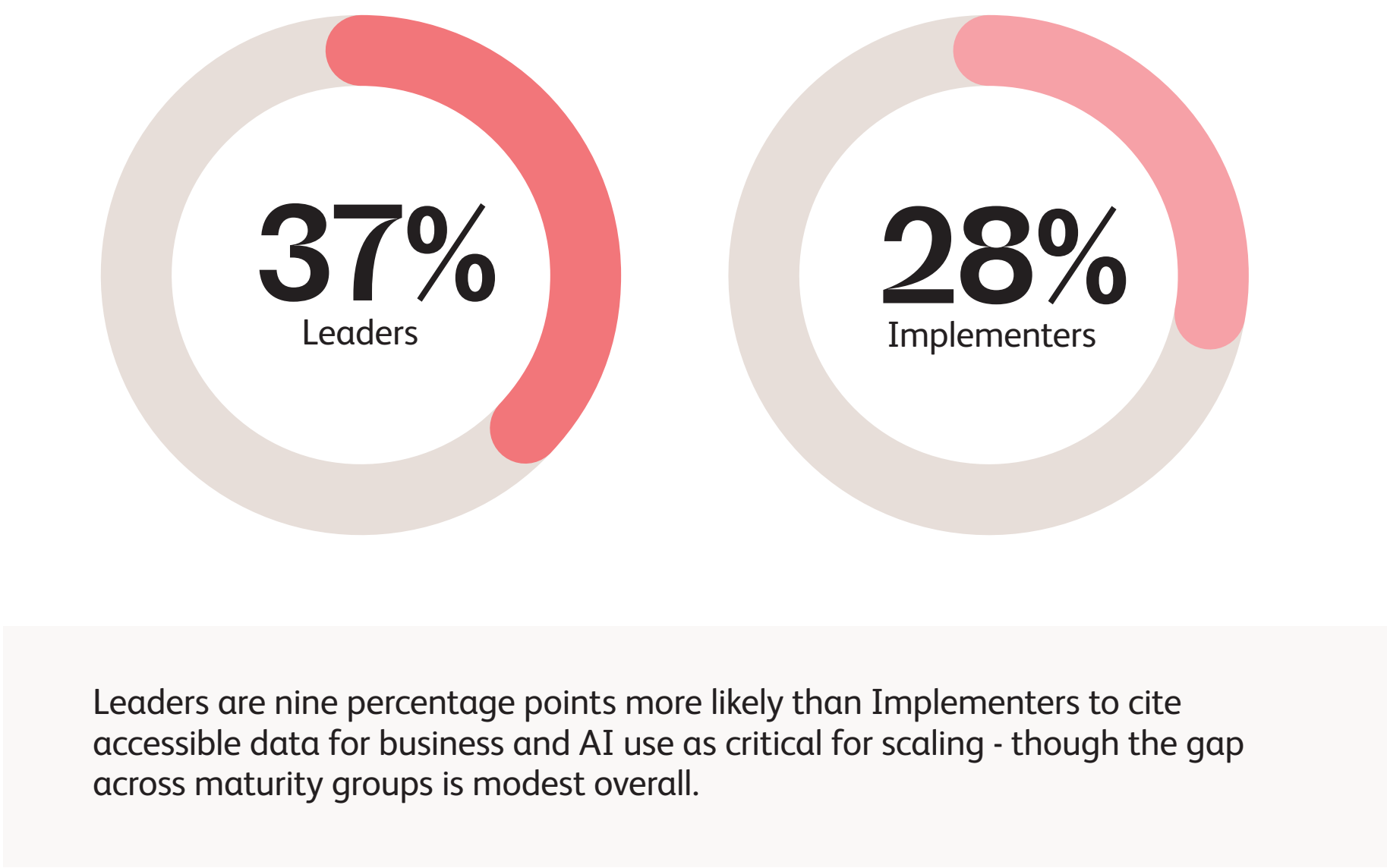
STRATEGIES FOR MANAGING AI-INDUCED WORKFORCE CAPACITY



Organizations are prioritizing workforce redeployment over reduction upskilling and reskilling (66%) and internal mobility (44%) far outpace redundancy-related measures (28% voluntary, 25% collective). Despite 62% of organizations already facing AI-induced overcapacity, the preferred response is to retain and repurpose talent.

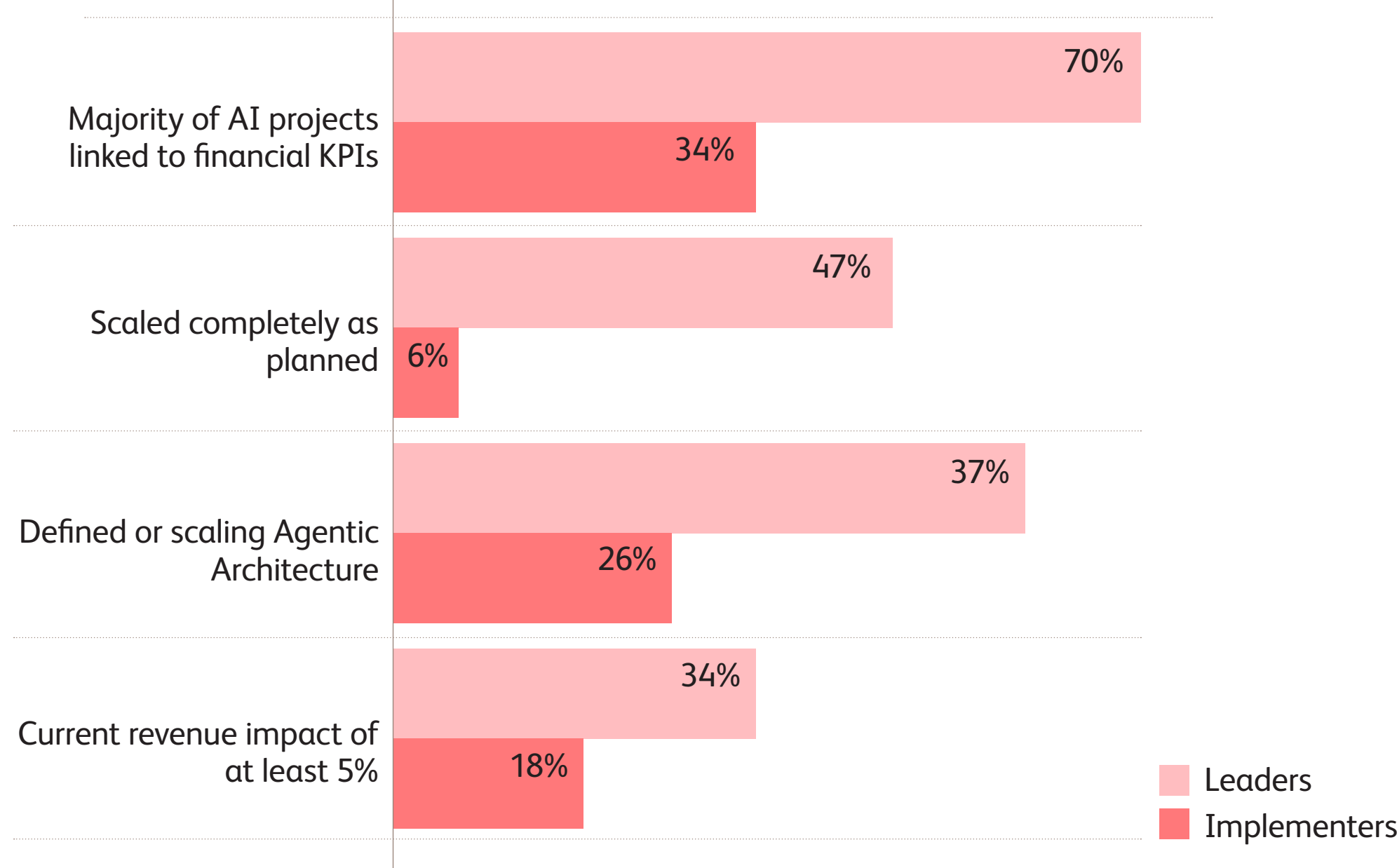
Data accessibility is a key differentiator for scaling AI

SHARE CITING ACCESSIBLE DATA FOR BUSINESS AND AI USE AS A CRITICAL SCALING CAPABILITY



Leaders win on effective execution and visible impact

IMPLEMENTERS VS LEADERS



Leaders are nearly eight times more likely than Implementers to scale AI completely as planned, and two times more likely to link most AI projects to financial KPIs.