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Enterprise Horizons 2026: Where Innovation Meets Reality



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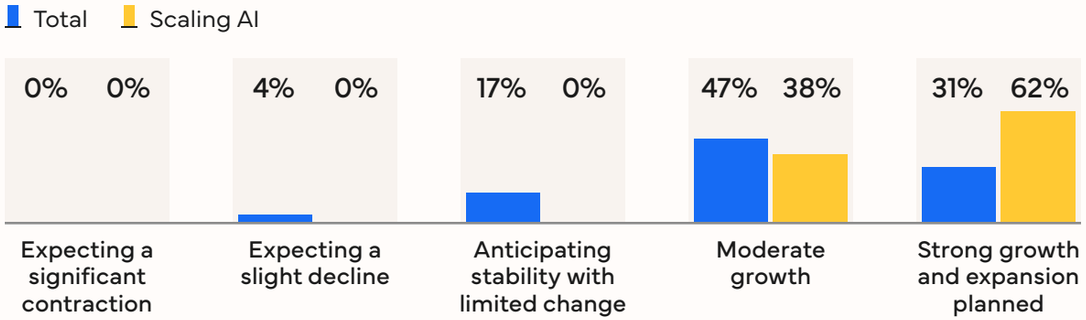
This InfoBrief analyzes global technology leaders' challenges and investments in 2026 — including the macroeconomic scenario, business priorities, technology investments, digital skills gaps, enterprise sustainability, and the evolving role of technology leadership — in building a resilient and competitive organization.

This analysis is based on the latest results of IDC's *Technology Leaders Survey,* 2026, conducted with 800 multinational enterprises of over 500 employees across the U.S., Europe, and Asia/Pacific.

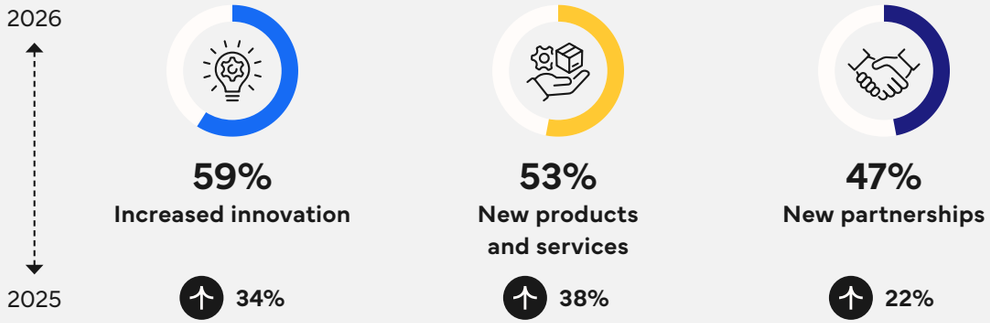
- **Networks are maturing but still need better flexibility and resiliency:** Network readiness has improved over the last year, but only 5% of companies' networks are fully ready for the future. Connectivity is a critical foundation to every aspect of modern business, and companies acknowledge the need to improve their networks' flexibility, resilience, and performance to meet future needs, particularly as AI makes increasing demands on infrastructure.
- **AI adoption is broad, but value realization is uneven:** AI is firmly on the enterprise agenda, with most organizations actively investing and experimenting. However, the majority remain in early or limited deployment stages, and many struggle to translate AI activity into consistent business outcomes. This highlights a growing gap between AI ambition and execution maturity, where governance, readiness, and disciplined investment approaches increasingly determine success.
- **AI delivers clear performance gains, while structural gaps limit economic impact:** AI is improving productivity, quality, and customer experience, but deeper economic benefits such as cost reduction and revenue transformation remain nascent. Shortfalls are driven less by the technology itself and more by foundational constraints in data quality, skills, and network performance, reinforcing the notion that AI success is an organizational and infrastructural challenge.
- **Balancing growth and innovation with cyber-risk mitigation and market disruptions:** Organizations are confident about near-term growth, fueled by (tech-enabled) innovation and new offerings. However, cybersecurity remains a top priority and risk, alongside challenges related to AI adoption, supply chain pressures, and rising digital sovereignty, as technology increasingly shapes companies' business agendas.
- **Companies innovating with AI the most are hit hardest by cybersecurity issues:** High-profile incidents, constant and evolving phishing and ransomware attacks, and a continued increase in experienced incidents have driven security to the top of the enterprise business and technology agenda. As companies race to innovate and grow with AI, many are seeing a rise in cyberattacks and associated losses, highlighting the need to balance innovation with security and resilience.
- **Sustainability is challenged by AI but remains a high priority:** Despite being overshadowed by AI, sustainability is a higher priority than it has ever been for more than half of companies and is a driving factor in technology partner selection. The tension between sustainability and innovation such as AI cannot be ignored, however, and companies are looking to mitigate the impact via a range of measures.
- **AI is reshaping talent strategies:** AI is reshaping workforce strategies toward fewer hires and higher-value skills, intensifying competition for talent and increasing reliance on upskilling existing employees. At the same time, persistent tech skills shortages — especially in cybersecurity, AI/ML, and data — are delaying digital initiatives and slowing innovation, making talent gaps a critical business constraint.
- **Technology leadership and C-level partnerships redefined:** AI is elevating the role of technology leaders from operational oversight to strategic business leadership while expanding responsibilities around AI governance and ethics. To deliver innovation at scale, a strong CIO-CFO partnership is critical for improving funding access, accelerating investment decisions, and balancing innovation with cost discipline.

Innovation as the engine of 2026 growth

What best describes your overall business outlook for the next 12 months?



How does your organization plan to deliver growth, internationally, over the next 12 months? [Choose all that apply]



Moderate global optimism, strong confidence among AI-driven companies

- **Cautious optimism:** Globally, 78% of organizations expect moderate to strong growth in 2026, with only a small minority anticipating stability or a slight decline. U.S. and European companies show slightly higher levels of optimism, while economic volatility in Asia/Pacific is prompting organizations in the region to adopt a more cautious stance — even though 71% still expect growth.
- **The AI growth multiplier:** Interestingly, companies that are already using AI extensively, or are committed to becoming AI driven ("scaling AI"), expect twice as much strong growth and expansion as the overall respondent base. Artificial intelligence is widely perceived as a critical lever for competitiveness, driving cost efficiencies, margin improvement, and innovation.

How to deliver growth in 2026: From efficiency to innovation

- In contrast to 2025's emphasis on cost containment and operational efficiency, organizations in 2026 are pivoting toward innovation — especially in Asia/Pacific — prioritizing investments in new products, services (notably across the U.S. and Europe), and partnerships to fuel growth and diversify revenue streams.
- **AI adoption is a key enabler of this transition:** AI unlocks efficiency and productivity gains that free up resources for innovation (in organizations scaling AI, this percentage rises to 70%) while also allowing companies to explore how technology can fundamentally disrupt and evolve their business models.

n = 800; n = 237 (organizations using AI in extensive or transformative ways); Source: IDC's *Technology Leaders Survey*, 2026, January 2026

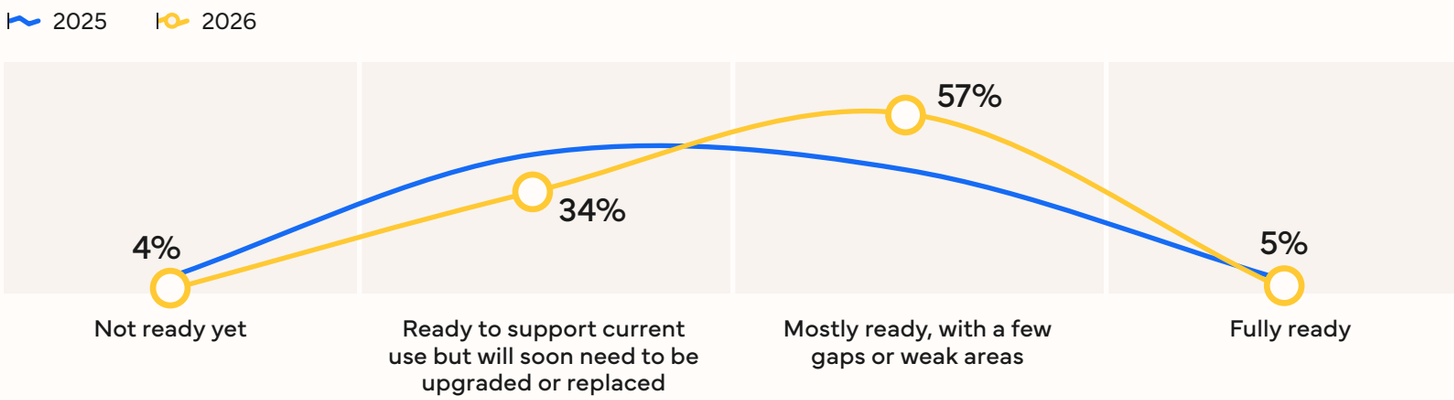
Networks are improving but need to be more flexible and resilient to support future business needs

Networks and connectivity are foundational to the modern enterprise and underpin future growth:

- Networks are the **#3 technology priority** for companies after security and AI and rank ahead of other critical technologies such as cloud and digital.
- Networks play a central role in **successful AI.** For AI implementations that succeed, 46% of companies attribute that success to their networks. For those that fail, a quarter point to under-performing networks as a main reason.

As companies realize the critical role that connectivity now plays in every aspect of their business, they are investing in it. As a result, **network readiness** to support future needs increased over the last year.

How ready are enterprises' networks to support their future needs?



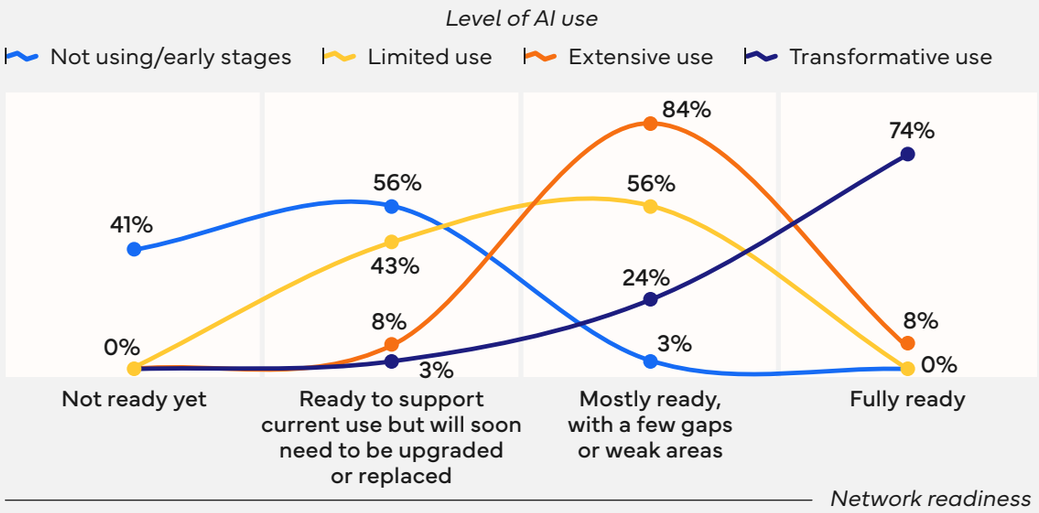
Despite this improvement, only 5% of companies believe their networks are fully ready for the future (mostly Asia/Pacific organizations; only 3–4% in Europe and the U.S.). Geopolitics, emerging technologies such as quantum, and AI in particular are creating uncertainty over future connectivity requirements.

n = 800; Source: IDC's *Technology Leaders Survey*, 2026, January 2026

Networks are improving but need to be more flexible and resilient to support future business needs (continued)

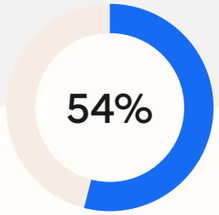
While networks are improving overall, the gap between the most and least advanced companies is huge. For example, the networks of organizations using AI most extensively are far more advanced/capable than those of organizations with limited AI use.

Companies with the most ready networks are able to make the most advanced use of AI

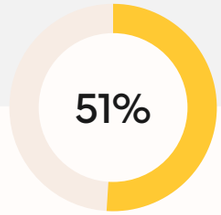


What is needed to bring networks further into line with the requirements of a future, AI-driven business environment? The top 3 issues remain:

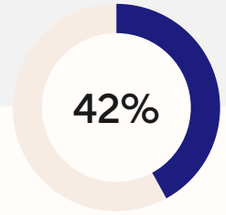
Flexibility
to connect with agility as needed



Resilience
and reliability to maximize uptime

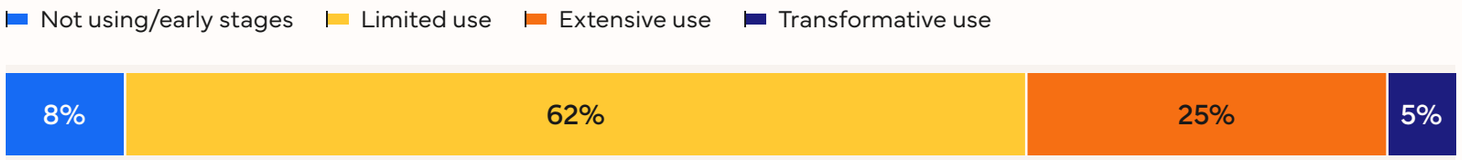


Bandwidth
to support high data volumes



AI adoption is widespread, but true enterprise maturity lags behind

Which of the following best describes how extensively your organization uses AI?



93.9%
of not using/ early-stage orgs expect decline or limited change.

57.3%
of limited-use orgs expect moderate growth.

54.3%
of extensive users plan strong growth expansion.

100%
of transformative users plan strong growth expansion.

Broad adoption, but most are still in early stages

Most enterprises remain in the early-to-mid stages of AI adoption, with 62% still in the limited-use phase, while truly transformative use remains rare. The most notable adoption levels are seen in Asia/Pacific, where 44% of organizations report extensive to transformative adoption. There is a clear correlation between AI maturity and business outlook: Organizations with more advanced AI adoption are significantly more likely to anticipate strong growth, while those in earlier stages tend to expect stability or decline.

The non-adopters (8%) face structural barriers.

Cost	59%
Security concerns	58%
Lack of in-house skills	53%

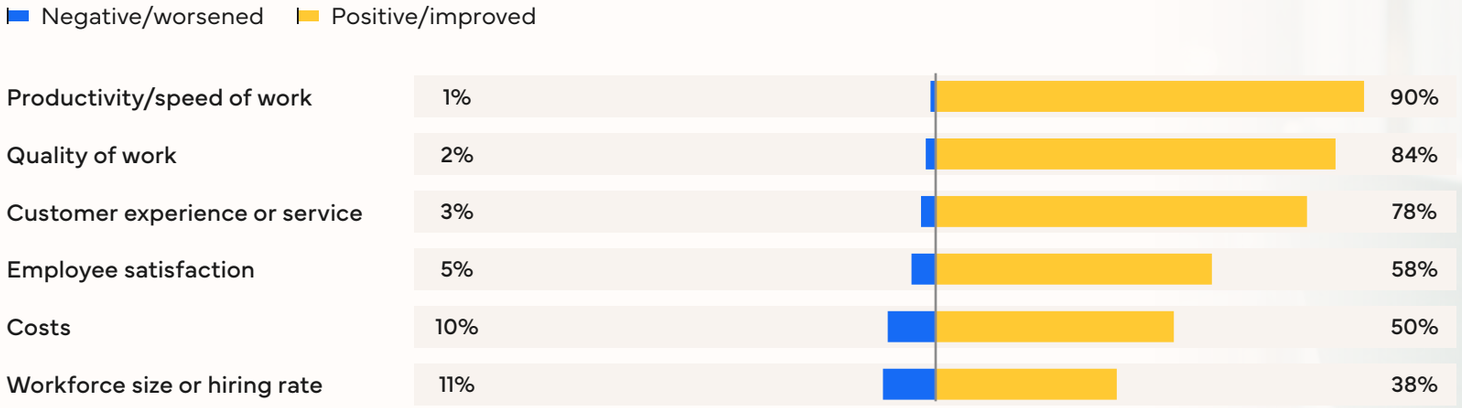
These barriers are not unique to non-adopters; even AI-active organizations are still navigating cost, security, and skills challenges. But the risk of inaction is growing. Enterprises that move fast, iterate, and learn by doing are already generating value while others wait for perfect conditions.

n = 800; Source: IDC's *Technology Leaders Survey*, 2026, January 2026

AI adoption is widespread, but true enterprise maturity lags behind (continued)

In which areas has AI led to improvement in your organization?

(% of organizations reporting worsened versus improved outcomes)



Reading the gap; performance versus efficiency

AI boosts output but has not yet reshaped underlying business economics:

- Most companies identify **productivity, quality, and CX** as the most impactful benefits of AI to date.
- Fewer organizations have seen a benefit in terms of **costs and employee satisfaction,** although a pattern may be emerging: U.S. companies report the greatest cost benefits but the least positive effect on employee satisfaction. Asia/Pacific organizations are the opposite — less cost reduction but higher employee satisfaction.

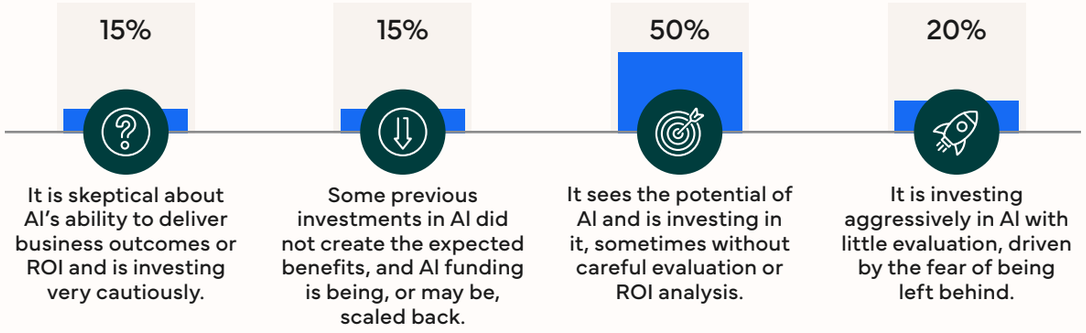
n = 800; Source: IDC's *Technology Leaders Survey* 2026, January 2026



AI investment is high, but ROI realization remains uneven

How is senior management investing in AI?

4 distinct senior management approaches to AI investment globally



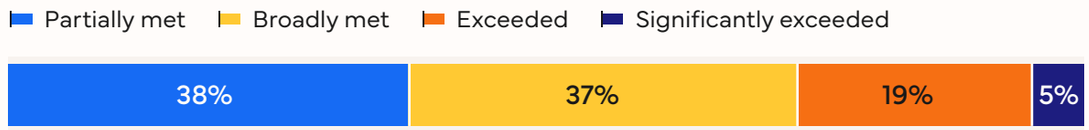
Investment patterns

Around 70% of organizations are investing in AI, motivated by its potential or by the fear of falling behind the competition, but they lag in disciplined ROI evaluation.

Regional differences are pronounced. In the U.S., only 10% of leaders are driven by the fear of lagging behind, compared to a much higher 37% in Asia/Pacific, indicating greater urgency. In contrast, Europe shows a higher proportion of "scaling back after unmet expectations" at 22%, versus just 6% in Asia/Pacific, suggesting greater fatigue or disappointment from earlier AI investments.

How well has AI delivered ROI?

AI is delivering measurable returns for a majority of organizations: Nearly 60% globally report positive ROI, while the remainder are seeing partial returns as initiatives continue to mature.



Asia/Pacific leads

Asia/Pacific leads in overperformance, with 40% of organizations reporting that AI has met or exceeded ROI expectations (33% exceeded, 7% significantly exceeded).

U.S. lags

In contrast, the U.S. lags, with only 15% reporting above-expected returns (12% exceeded, 3% significantly exceeded).

Investment posture plays a critical role in these outcomes.

Organizations investing aggressively are 67% more likely to report that AI has exceeded ROI expectations, while more skeptical investors are 76% more likely to say returns have only partially met expectations. However, bold investment alone is not sufficient. Without the necessary foundations (i.e., governance, infrastructure, data, skills, and network readiness), aggressive spending risks amplifying inefficiencies rather than closing the ROI gap.

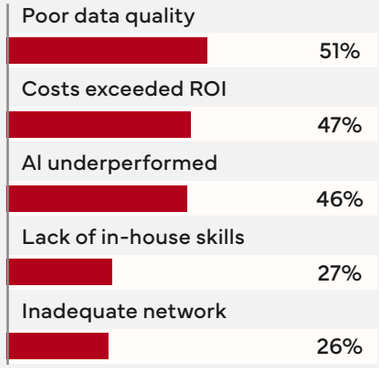
n = 1,200+; Source: IDC's *Global AI & Network Performance Survey*, 2026

Data, skills, and networks determine AI winners versus losers

What prevented AI from delivering ROI?
Among organizations where AI underperformed expectations

AI shortfalls are structural, not just technical

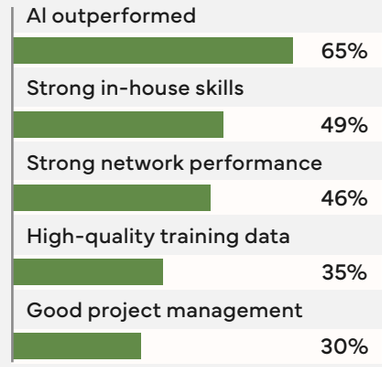
AI shortfalls are driven primarily by data quality and cost-to-value challenges, with technical performance gaps reflecting broader organizational readiness issues. While 25% cite unrealistic expectations from stakeholders, most barriers are operational and structural, meaning the issue is more execution than hype. AI ROI exceeds expectations when driven by strong performance, skilled talent, and robust connectivity.



What drove AI to exceed expectations?
Among organizations where AI surpassed expectations

The infrastructure imperative

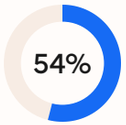
AI potential is widely recognized, but realization is uneven. The gap between aspirations and outcomes is most often explained by foundational gaps in data quality, skills, and, critically, network performance. For technology leaders, the implication is strategic: AI success is not only a software challenge; it is a network challenge. As AI workloads become more demanding and distributed, the reliability, resiliency, and continuity of underlying connectivity infrastructure becomes a defining factor in whether AI investments pay off. Organizations that align their network strategy with their AI ambitions will be better positioned to convert investment into measurable business value.



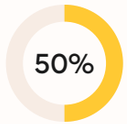
Key insight

Network and connectivity is both a top failure factor (26%) and a top success factor (46%). As AI workloads grow, infrastructure readiness is not an afterthought; it is foundational. Organizations that invest in network readiness are better positioned to extract value from AI.

Key risks on the horizon — all organizations



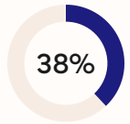
Creating new security risks



Experiencing reputational, financial, or legal harm from AI behavior



Losing track of AI costs and ROI once embedded



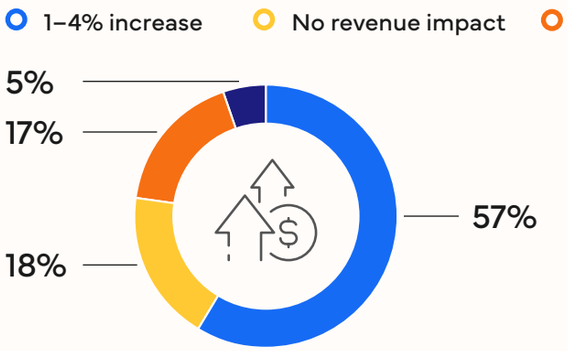
Creating a new point of technology failure

n = 1,200+; Source: IDC's *Global AI & Network Performance Survey*, 2026

AI is transforming productivity and quality; revenue impact is next

What revenue uplift do you expect from AI in the next 12 months?

Revenue uplift breakdown



Most organizations expect modest **1–4% revenue uplift** from AI. But the crosstab reveals a clear pattern: **The deeper the AI adoption, the higher the expected returns.**

The opportunity for differentiation lies in building the right foundations: data, skills, infrastructure, and governance.

Globally, most organizations are taking a pragmatic view of AI's near-term revenue impact, with 57% expecting modest gains in the 1–4% range. Asia/Pacific stands out for its more polarized expectations. On one hand, it is the most optimistic region, with 11% of organizations projecting significant revenue uplift (9% expecting 10–24% growth and 2% expecting 25–49%). On the other hand, it also has the highest share of organizations (20%) expecting no revenue impact from AI at all. This divergence suggests a widening gap between leaders and laggards within the region. Ultimately, the opportunity for differentiation lies in building the right foundations (data, skills, infrastructure, and governance) — this will determine which organizations capture outsized value as AI adoption matures.

Early-stage adopters see little upside: **15%** expect decline; **83%** expect no impact.

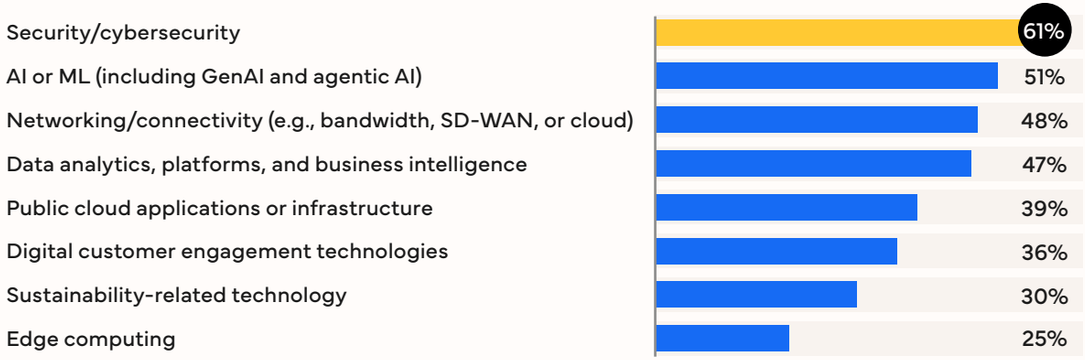
Limited use unlocks modest gains: **67%** target 1–4%, but **18%** expect no impact.

Extensive users shift the curve: **39%** expect 5%+ uplift, including **12%** projecting 10–24%.

Transformative adopters aim highest: **42%** target 10–24%, and **18%** expect 25–49%+ revenue uplift.

Strengthening tech foundations while elevating digital sovereignty

Which of the following technologies will your organization prioritize in terms of effort and/or financial investment over the next 12 months? [Choose up to 3]



Organizations are prioritizing technologies that simultaneously strengthen secure and resilient foundations and unlock future innovation capacity.

- From the threat and business scenario, it is clear how cybersecurity also tops the technology priorities list in 2026. Investments in AI and ML follow close behind, reflecting momentum toward innovation automation, intelligence-driven processes, and new innovation opportunities.
- Investments in network modernization and data platforms highlight the need for robust, high-performance digital infrastructure capable of supporting increasing data volumes, distributed workloads, and AI-centric use cases while ensuring security and resiliency.

What are the main factors driving your organization's focus on sovereignty in digital and data strategies? [Choose up to 3]



33% of organizations globally consider digital sovereignty a high or top priority.

Desire to retain control over sensitive or strategic data	53%
Regulatory compliance across jurisdictions	52%
Concerns over cross-border data transfers and jurisdiction	38%

Digital sovereignty is a global priority, driven by the need to retain control over sensitive data amid rising regulatory complexity and geopolitical risk. While the goal is shared, the drivers vary by region.

- **U.S.:** Emphasis on data control, operational resilience, and national security, with sovereignty framed through risk management rather than strict localization mandates
- **Asia/Pacific:** A more cautious and fragmented approach, reflecting diverse regulatory regimes and uneven digital maturity, as organizations balance growth with concerns over data localization, cross-border flows, and geopolitical sensitivity
- **Europe:** Predominantly regulation-led, driven by GDPR and strict data residency rules, with digital sovereignty treated as a baseline requirement embedded into infrastructure, cloud, and vendor decisions

n = 800; Source: IDC's *Technology Leaders Survey*, 2026, January 2026

Competing pressures in 2026: Cyber-risk mitigation tempers growth ambitions

How significant a threat will the following global risks be to your organization's business strategy over the next 12 months? (Top 3 considered as big/huge threat shown)



63%
Cybersecurity threats

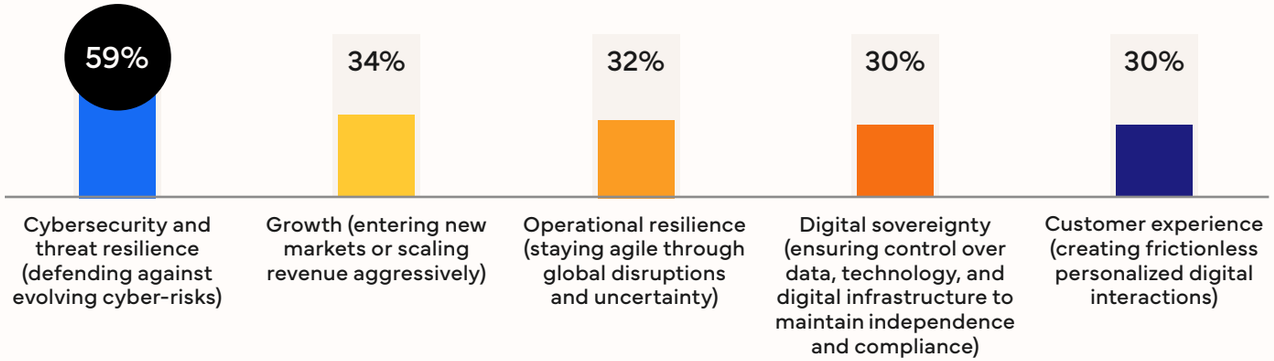


36%
Supply chain disruptions



30%
AI adoption and implementation challenges

What are the most important business priorities that will drive technology investments in your organization over the next 12 months? (Choose up to 3) (Top 5 shown)



From cybersecurity threats to digital sovereignty and AI adoption: Technology shapes business priorities

- **Organizations are being pulled in different directions.** Growth is not just an expectation but a strategic business imperative shaping technology investments in 2026. At the same time, cybersecurity stands out as both a top global threat and a top business priority. This is driven by the rising number of cybersecurity incidents with direct revenue impact, as well as the expanding attack surface created by broader AI implementation — the percentage rises to 90% for companies scaling AI.
- **Operational resilience remains essential.** In a global context marked by geopolitical uncertainty and ongoing supply-chain disruptions — from energy prices to tariffs — organizations continue to prioritize flexibility and readiness for market shocks. Digital sovereignty is also emerging as a key trend, driven by the need for technological independence in data and infrastructure to comply with stricter national requirements, as well as by strategic considerations around technology provisioning.
- **Artificial intelligence is considered both an opportunity and a major risk for organizations worldwide.** Ethical concerns, insufficient infrastructure and foundational technologies, and the growing skills gap can all temper the innovation momentum associated with AI adoption.

n = 800; n = 237 (organizations using AI in extensive or transformative ways); Source: IDC's *Technology Leaders Survey*, 2026, January 2026

Companies innovating with AI most extensively are hit hardest by cybersecurity issues

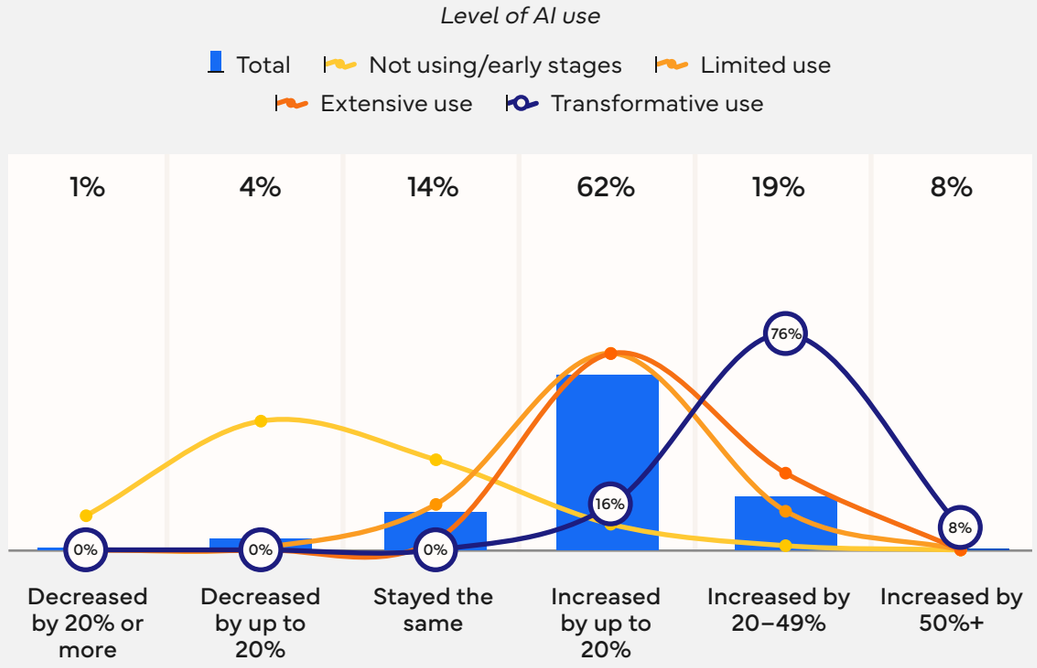
We included cybersecurity in six questions within the survey covering priorities, risks, and skills. Cybersecurity issues were #1 — often by a huge margin — in each of the following areas:

Threat to business strategy	63%	Risk of using AI	54%
Business priority	59%	Skill shortage	35%
Technology priority	61%	Fear for the future	Open ended

This is no surprise when we see how **cyberattacks have grown in recent years,** from high-profile incidents targeting household names to an unending stream of small attacks aimed at businesses across the spectrum.

The chart on the right shows that, in total, 81% of companies reported an increase in incidents over the last year. But most concerning is that **as companies make more use of AI, they experience more attacks:** All companies using AI in a transformative way saw an increase, with 84% of them reporting a surge of 20% or higher. No wonder that technology professionals tell us, in their own words, that growing or diversifying attack vectors is the number one fear they have of the future.

Change in cybersecurity incidents over the last 12 months



n = 800; Source: IDC's *Technology Leaders Survey*, 2026, January 2026

Companies innovating with AI most extensively are hit hardest by cybersecurity issues (continued)

But it is the outcome of those incidents that matters the most. Consistent across all global regions, 64% of companies suffered material loss of revenue, output, or productivity over the last 12 months as a result.

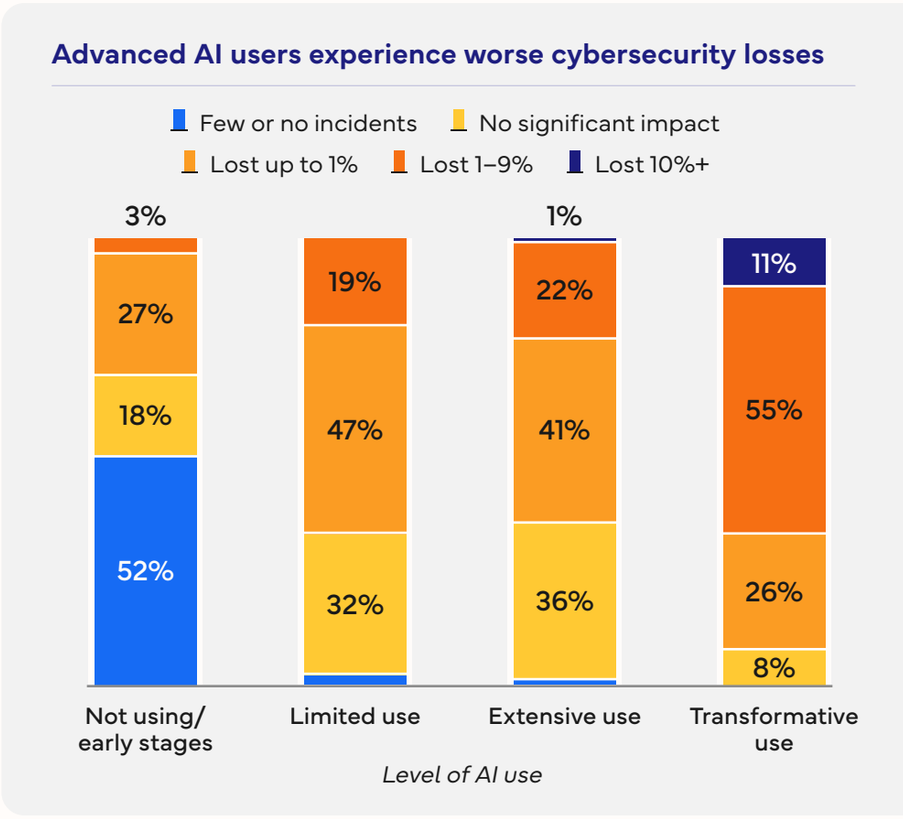
The lucky few:

We experienced few or no cybersecurity incidents	6%
We experienced incidents, but they did not have a significant impact	30%

The majority lost:

Up to 1%	43%	1%–9%	20%	10%+	1%

Losses were a little worse for large enterprises, worse still for companies expecting growth, but were worst by far for **companies making the most use of AI.** These are also the organizations experiencing the greatest increase in attacks, as seen on the previous page. The rush to innovate is increasing their attack surface at a faster rate than they can secure, and they are paying the price.





n = 800; Source: IDC's *Technology Leaders Survey*, 2026, January 2026

Sustainability is challenged by AI but remains a high priority that needs to work alongside innovation

We asked companies where they stood on a range of sustainability-related issues. Their responses show that, far from falling off the agenda, sustainability is more important now than ever.



Sustainability is a **higher priority** than it has ever been for 60% of companies. The figure is even higher among those expecting growth and those using AI extensively, rising up to 84% among businesses using AI transformatively.



For 58% of companies, that is partly due to **senior leadership concern** over technology sustainability, driven by regulation, reputation, competitive differentiation, and shareholder pressure, among other factors. This is driving action throughout their organizations.



Pressure is also being applied bottom-up. In 56% of companies, **employees are increasingly concerned** about the sustainability of the technology they use for their work.

*As a result, **68% of companies factor in sustainability credentials** when choosing a technology partner (in Europe, this figure reaches 73%). This is driving partners to up their sustainability game, making it easier for businesses to find sustainable options.*



However, **sustainability pulls against innovation:** More than half of companies are struggling to balance the two.

This potentially puts sustainability in conflict with the rise of AI. The reality is that companies have to do both at the same time: use AI to innovate and improve their stance on environmental protection.

Every company surveyed in the research is taking or planning action to mitigate the sustainability impact of AI.



Energy efficiency is the most common action (51% of organizations), particularly among U.S. companies (59%), where the problem of AI energy demand growing faster than supply is particularly acute.



45% of companies are **monitoring and limiting** the use of AI to minimize the sustainability impact. This is particularly common among companies using AI the most intensively (58%).



And they are using **green/renewable energy,** infrastructure, or services (44%). Again, this is most true of organizations using AI to a transformative degree (63%), as well as companies experiencing strong growth (58%).



Some businesses are **minimizing training new models** and reusing existing ones (42%). However, this is a defensive move that limits the usefulness of AI and is adopted inversely to the level of AI use — down to 29% among the most advanced AI-using companies.



Carbon offsetting is the least popular form of mitigation — and an imperfect and controversial one — used by only 16% of organizations, primarily large enterprises.

Bottom line: Companies scaling their AI need to take future energy requirements into account for both sustainability planning and assuring the availability of supply. They should look at optimizing energy use, relying on renewables where possible, and seeking partners with solid environmental sustainability credentials.

n = 800; Source: IDC's *Technology Leaders Survey,* 2026, January 2026

Fewer hires, higher skills: The new AI talent equation

1

AI may reduce the number of people hired, but:

(% of respondents who agree/strongly agree)



64%
state that those who are being hired are more skilled and more costly.



63%
are **reinvest** savings in **upskilling and reskilling** the existing workforce.

2

Competition for tech talent is higher:

(% of respondents who agree/strongly agree)



62%
report that **hiring** for **key technology roles** (e.g., AI-related) **takes much longer than it did 12 months ago.**

3

AI maturity matters when looking at technology skills gaps:

(% of respondents who agree/strongly agree: usage of AI in extensive or transformative ways)



65%
of CIOs **spend more time** on **solving skills gaps** than on technology strategy
*(versus **53%** of all organizations surveyed).*



58%
state that **talent competition** is a **bigger growth risk** than **cyberthreats** or **geopolitical threats**
*(versus **44%** of all organizations surveyed).*

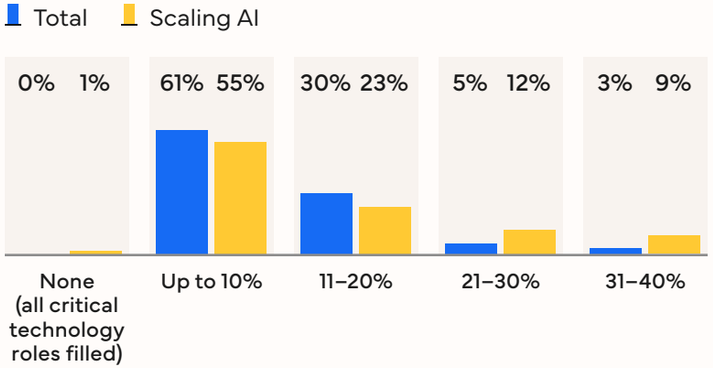
- **AI may be contributing to a slowdown in hiring,** but this trend is largely driven by a structural transformation of the job market rather than direct human–machine substitution. Organizations are willing to pay a premium for the right skill sets, while the search for key technology roles has become more difficult and significantly longer compared to just a year ago.
- **More AI, more skills gaps.** Organizations that are already using AI extensively — or are committed to becoming AI-driven — are experiencing intensified pressures. While technology leaders report spending more time on closing the skills gap than on shaping the technology roadmap itself, they also agree that competition for talent can transform a bigger risk to company growth than cybersecurity or geopolitical threats.
- **What does this tell us?** Because of these structural forces, organizations may end up hiring fewer people overall. However, the resulting savings are typically reinvested in AI upskilling and reskilling initiatives across the workforce. This not only helps companies maximize the value of their existing talent base but also serves as a strategic imperative for enabling sustainable, cross-functional AI implementation.

n = 800; n = 237 (organizations using AI in extensive or transformative ways); Source: IDC's *Technology Leaders Survey*, 2026, January 2026

The innovation slowdown from missing skills

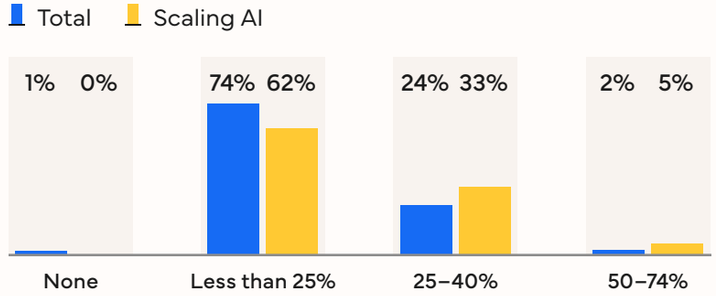
The tech talent vacuum

Approximately what percentage of your organization's critical technology roles are currently unfilled due to digital skills shortages?



The digital initiatives time lag

How many of your digital initiatives, on average, have been delayed due to digital skills shortages?



Top 5 skills needed:

In which of the following areas does your organization most urgently need to hire skills?

Cybersecurity	35%
AI/ML	26%
Data engineering/ data science	12%
Cloud engineering and architecture	9%
Networking and infrastructure	9%

- **The impact of increasing pressure on technology talent competition is clear:** Digital skills shortages are leaving a share of critical technology roles unfilled, especially among organizations already scaling AI. Over half report that at least 10% of essential technology positions remain vacant, creating a structural capacity gap that slows innovation.
- AI-driven organizations are experiencing execution drag even more acutely, with most reporting delays affecting up to a quarter of their digital initiatives and around one third reporting delays of up to 49%. Skills shortages are directly stalling transformation timelines.
- Even more importantly, **the skills most urgently needed are fully aligned with this year's top technology priorities.** Cybersecurity remains the leading skills gap, as organizations work to defend against both external and internal threats, a challenge amplified by AI adoption. AI-related skills come in second place, with data engineering and data science also representing critical shortfalls for delivering high-quality data and producing the insights needed to power effective AI systems. Shortages in cloud and networking skills risk becoming a bottleneck for AI scaling, security, and enterprise resilience.

n = 800; n = 237 (organizations using AI in extensive or transformative ways); Source: IDC's *Technology Leaders Survey*, 2026, January 2026

AI is elevating tech leadership, and the CIO-CFO alliance is key

AI adoption is reshaping what technology leaders are expected to deliver, expanding responsibility and urgency. This is giving rise to new dedicated roles, such as the chief AI officer, to face challenges such AI governance and talent shortages.

How is the implementation of AI changing the role of technology leaders in your organization? [Choose up to 3]

49%
Accelerating shift from operational oversight to strategic business leadership

48%
Increasing their responsibility for ethical and responsible AI governance

44%
Driving the need for new skills in data science, automation, and AI integration

22% of organizations scaling AI have hired a chief AI officer in the past 12 months to:

This is over 2x the share seen in all organizations

1. build internal AI capabilities and talent
2. oversee AI governance and risk management
3. ensure the responsible and ethical use of AI

While tech leaders take on more strategic business responsibilities, strong C-suite alignment becomes essential to deliver AI at scale. **A strong CIO–CFO partnership unlocks AI investment, impact, and innovation.**



A strong CIO–CFO partnership:

Is more likely to secure funding for AI and innovation	84%
Speeds up tech investments approval	83%
Helps balance innovation and costs	81%

% of respondents who agree/strongly agree

n = 800; n = 116 (organizations using AI in an extensive or transformative capacity with a chief AI officer); Source: IDC's *Technology Leaders Survey*, 2026, January 2026

Recommendations for enterprises: How to balance innovation and risk

The following guidance can help technology leaders focus on secure, resilient growth and innovation:

- **Prioritize and secure your innovation initiatives:** Identify a shortlist of (AI and tech-led) innovation initiatives and assess them jointly against value creation and risk criteria, embedding cybersecurity, operational resilience, and digital sovereignty into growth decisions from the outset.
- **Shift from AI experimentation to execution discipline and value governance:** Move beyond fragmented pilots by prioritizing a focused set of AI use cases and embedding clear ownership, ROI expectations, and performance metrics from the outset. Strengthen governance, data readiness, and cost visibility early to avoid scaling AI before the organization is structurally prepared to capture sustainable value.
- **Invest in foundational enablers — data quality, skills, and network connectivity — to unlock AI's economic impact:** AI success depends less on models and more on the underlying foundations that support them. Enterprises should systematically address data quality gaps, build and retain critical AI and data skills, and ensure networks are resilient and high-performing enough to support distributed, data-intensive AI workloads at scale.
- **Identify how best to transform your networks to support an AI future:** Advanced networks enable advanced applications and workloads, and the correlation between network capabilities and transformative AI use is clear. However, it requires more than just extra bandwidth. Flexible connectivity that connects to resources as needed in a manageable, easy-to-consume way, with advanced security to protect against rapidly evolving threats, are minimum requirements.
- **Understand the role that connectivity plays across your whole business:** We highlight here that networking is critical to AI, but the reality is that all of modern digital business relies entirely on high-performance, secure, and reliable networks. To ensure business continuity, assess the quality and resilience of your connectivity estate against both current and future needs, as well as protection against security incidents and network outages.
- **Balance innovation and growth, security and resilience, and sustainability:** A major aspect of today's technology environment is the fierce pull between three competing forces: AI-driven innovation, security/resilience, and environmental sustainability. All are critical and urgent, yet they also pull hard against each other. Some companies will prioritize security over rushed AI initiatives and will overtake competitors that move too fast. But others will not. Without being able to predict outcomes to that level, we recommend companies keep all three in balance — e.g., by building in agile collaborative structures between domain stakeholders.
- **Be proactive in your talent and skills plans:** Shift from reactive hiring to a skills-first talent strategy, prioritizing critical capabilities (cybersecurity, AI/ML, data) and systematically reskilling existing employees. Conduct a rapid skills gap assessment against top digital priorities and launch targeted upskilling programs for 1–2 high-impact roles, aligning learning investment directly to delayed or at-risk initiatives.
- **Establish a formal C-suite steering cadence as a tech-business strategy:** Start by establishing a formal CIO-CFO AI steering cadence focused on a defined set of priority AI use cases and technology initiatives, with shared ownership of funding, value metrics, and risk governance. Expand this forum to include other key executive stakeholders, positioning it as both a steward of ethics and governance principles and a catalyst for tech-enabled business outcomes.

About the IDC analysts



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James Eibisch manages IDC's European Enterprise Communications Services research. He focuses on fixed enterprise network services such as SD-WAN, NaaS, cloud connectivity, sovereign networking, and managed network services. He works with clients including asset-based and asset-light network service providers, cloud and datacenter companies, and network infrastructure vendors to help define their strategies, portfolios, and go to market.

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Martina Longo is a research manager in the IDC AI-Fueled Business Strategies Team. In her role, she advises ICT players on how organizations can create business value from AI and other digital technologies, examining organizations' digital and AI maturity, key business priorities and use cases, and transformation dynamics. She is the worldwide lead for the research on Innovation and Transformation DNA topic, looking at how organizations build the structures, capabilities, and cultural foundations required to scale innovation. Martina also co-leads the Europe, Middle East, and Africa AI-Fueled Business Strategies research, looking at regional differentiators in AIfueled business transformation and value creation.

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Masarra Mohamed leads IDC's Communications Platforms as a Service research and advisory practice worldwide. Her research focuses on key industry trends, including network APIs, conversational messaging, developer requirements, and the role of GenAI and agentic AI in transforming enterprise communications. She advises telecom operators, CPaaS providers, and technology vendors on growth strategy, market positioning, and ecosystem development.

More about Masarra Mohamed →

Message from the sponsor

expereo
faster to the future



Ben Elms
CEO of Expereo

Our latest research makes one thing clear: While business priorities have shifted over the past 12 months, the stakes have never been higher, and AI is no longer experimental.

However, ambition is outstripping readiness. As organizations move from AI pilots to scaled deployment, they are encountering very real challenges around data sovereignty, infrastructure resilience, security risks, and critical skills shortages.

From a technology business leader's perspective, it is clear the network sits at the center of everything. Whether enabling AI, security, or sustainability goals, success depends on an agile, resilient, and globally consistent network foundation.

Over the next 12 months, the organizations that succeed will be those that address capability gaps through the right partnerships, while building infrastructure that is secure, scalable, and aligned with growing sustainability expectations.

Expereo enables enterprise businesses' long-term growth with secure global managed network-as-a-service solutions that deliver connectivity, resilience, and visibility.

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