



Leading the AI Supercycle

Is there life beyond efficiency?

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Your Hosts



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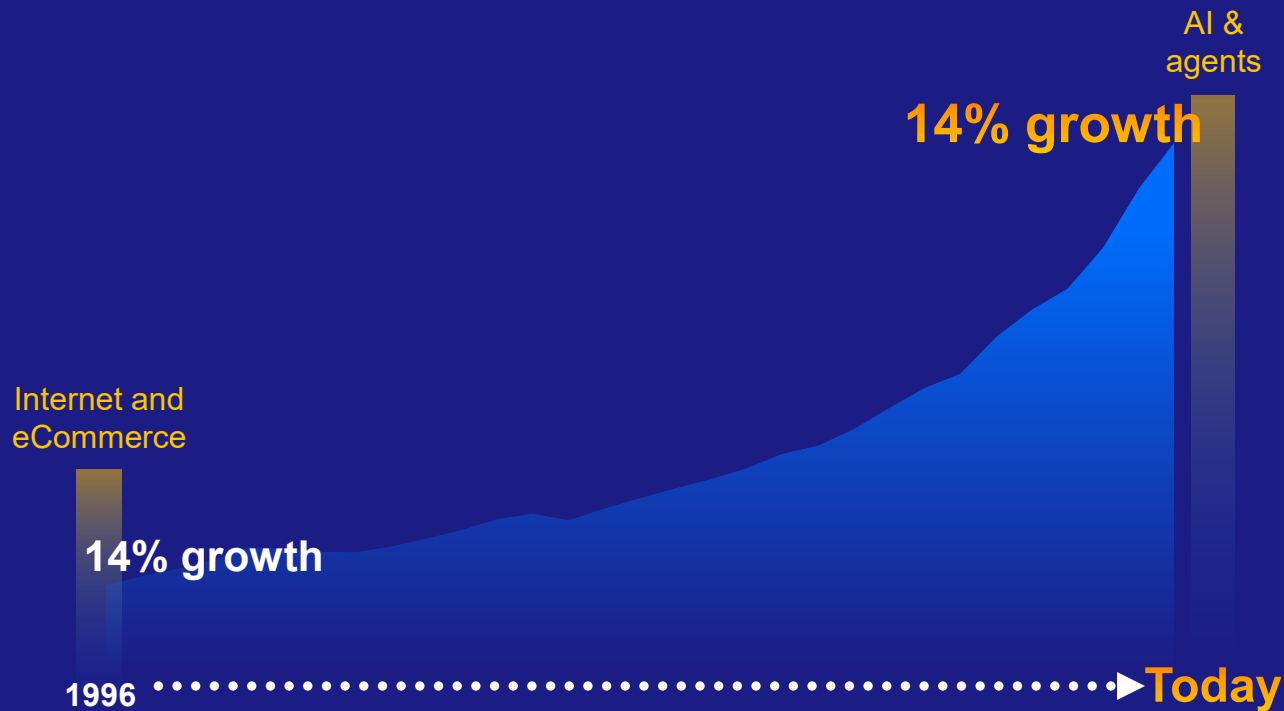
Garima Singh
Chief Technology Officer
Pandora



Shivaun Melissa Anderberg
Head of Data & AI, PhD
Publicis Sapient



Strongest IT spend since 1996



Source: IDC Worldwide Black Book 31-March-2026, Forecast

Market impact

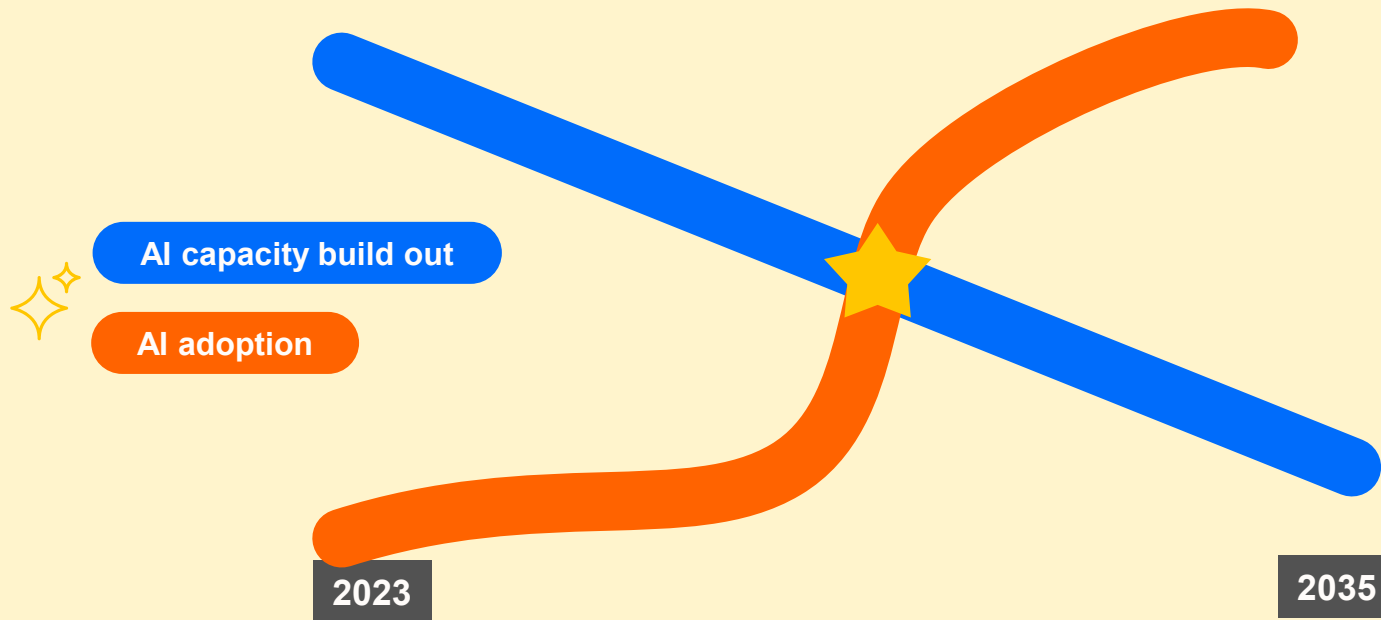
1996
14%
On \$700
billion
market

2025
14%
on \$4.2 trillion
market

Nordics: +10.1% on \$85 billion



The AI supercycle: Build out => adoption



Market impact

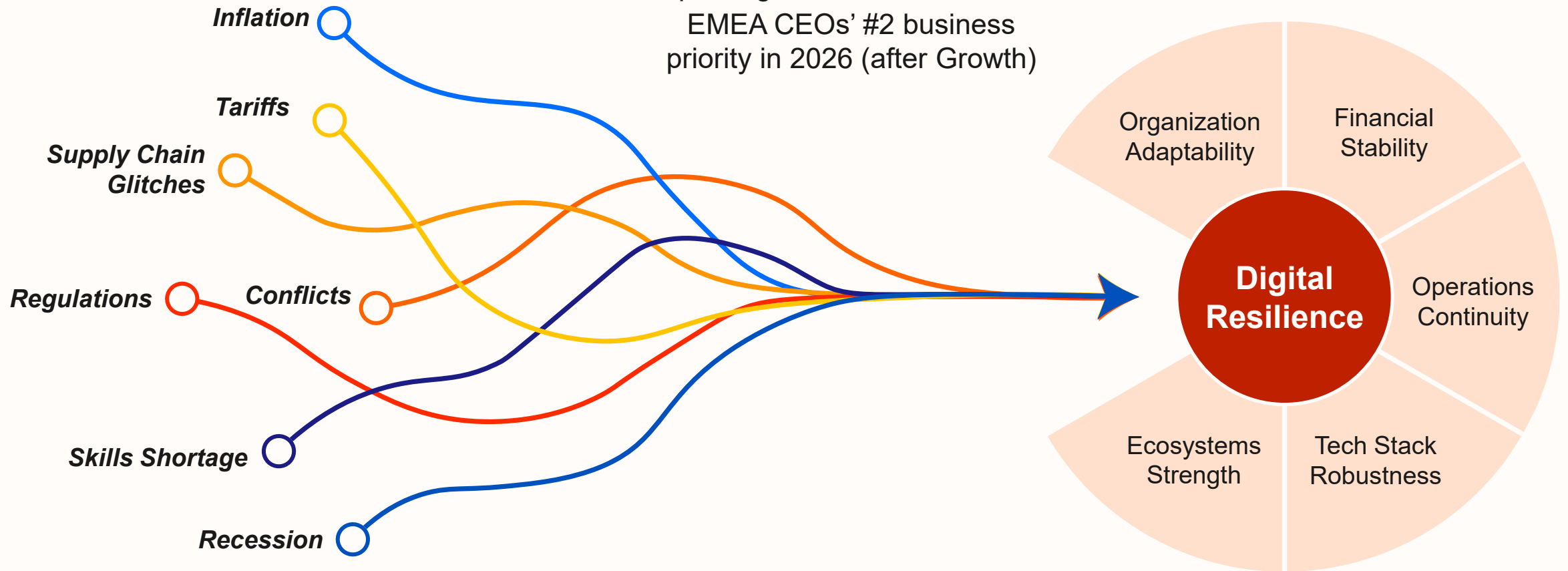
- **Supply:** When is infrastructure ready for inference at scale?
- **Demand:** When do enterprises go from experimentation to production?

Source: IDC, 2026



EMEA CEOs confronting the strategic tension between resilience and...

Improving **Resilience** is EMEA CEOs' #2 business priority in 2026 (after Growth)



...and Innovation

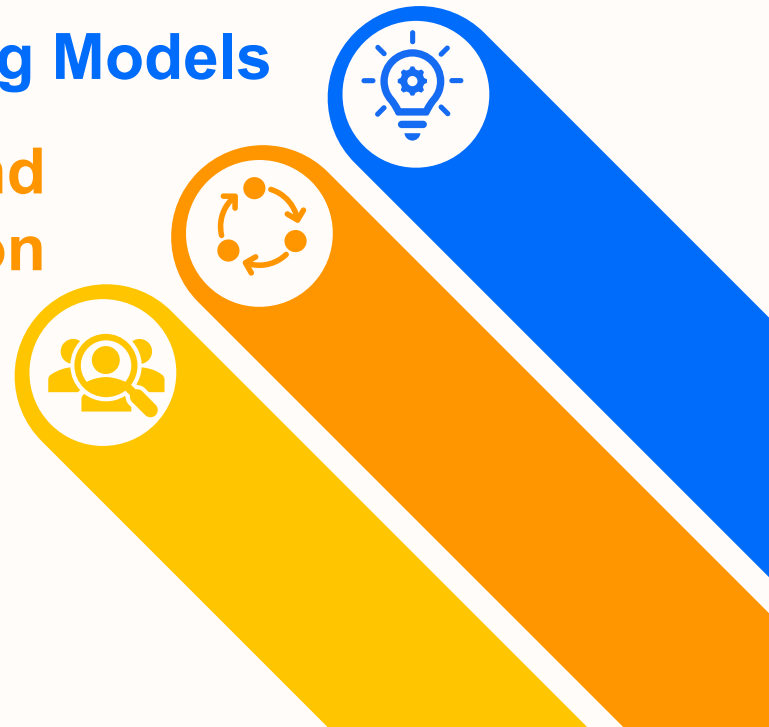
ALL EMEA CEOs believe AI will offer their organization a chance to **reinvent their business model** over the next 3-5 years

Source: IDC's Worldwide CEO Survey, March 2026, EMEA n=155

New Operating Models

**Business Partner and
Ecosystem Orchestration**

Customer Engagement



No More Tools. Just Make It Work.

49%

of EMEA organizations

have shifted their AI program focus from “growing and launching new pilots” to “**improving**” existing initiatives.

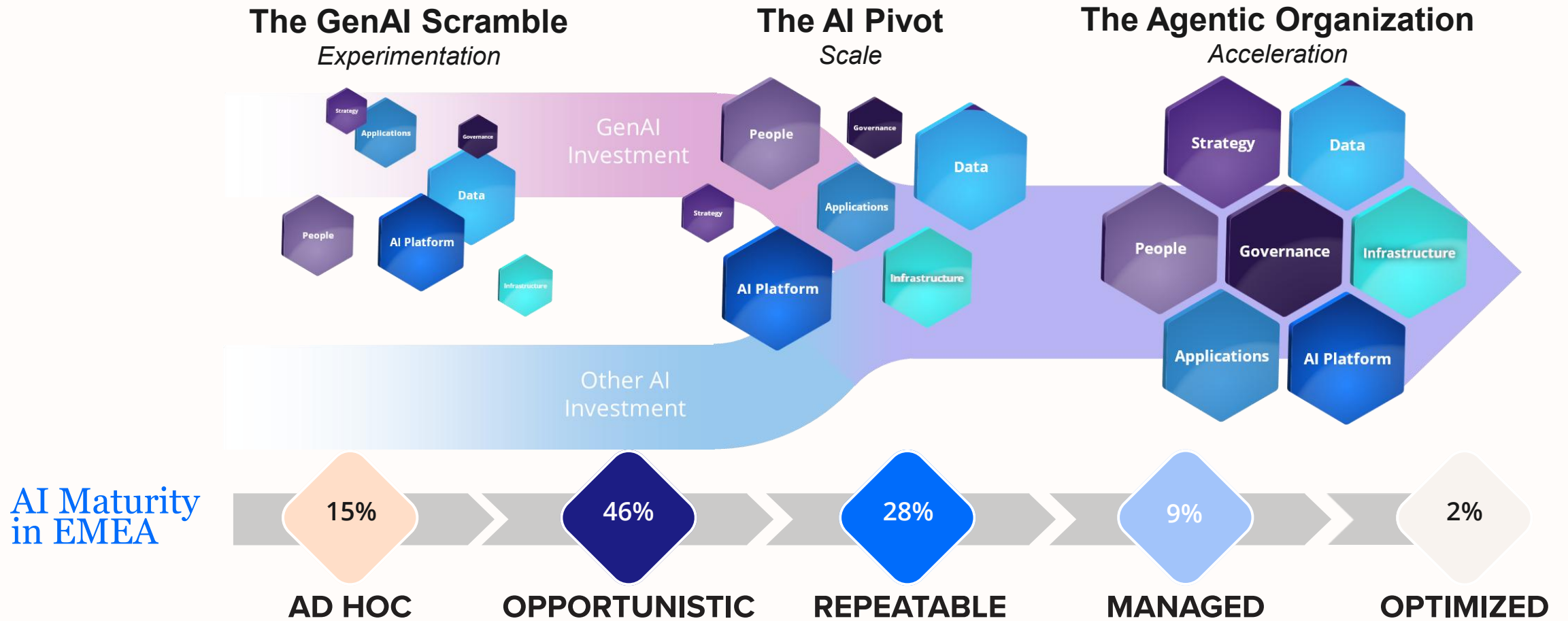
Source: IDC's Future Enterprise Resiliency & Spending Survey Wave 7, 2025, N=864, NA: 350, WE: 214, AP: 300

Main Concerns

- Data Governance & Readiness
- Skills & Change Management
- Trust, Risk & Responsibility

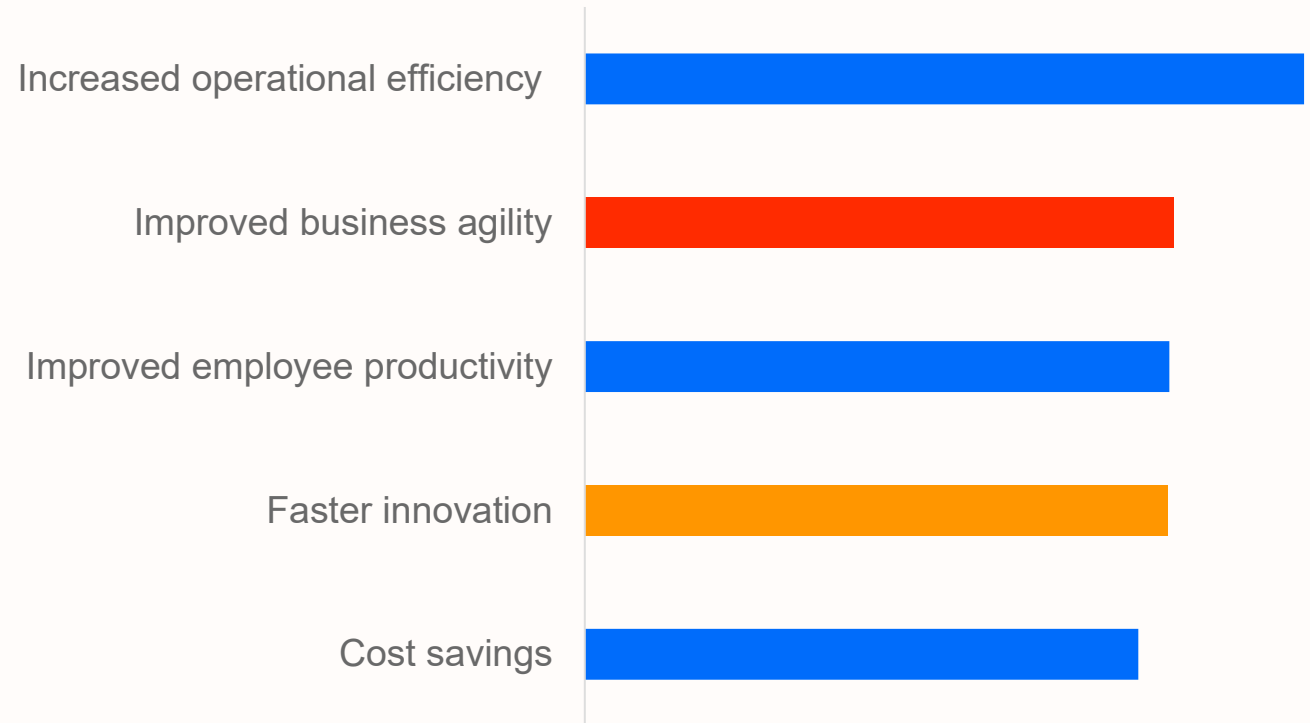


AI Value is blocked by Execution, not Interest



Where AI Delivers Today: Efficiency First

What are the expected main business benefits to your organizations from Agentic AI implementation?
(Top 5 Only)



■ = Efficiency

■ = Innovation & Growth

■ = Resilience



Is there Life after Efficiency?



From selling jet engines to selling "Power-by-the-Hour"

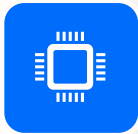


ROLLS-ROYCE



AI Business Model Archetypes: New Value creation & Delivery

For **93%** of organizations, **AI is a source of new revenue**, not just efficiency



AI-Enhanced Products & Services

→ AI embedded in existing products.



X-as-a-Service

→ AI-enabled ongoing product+service bundles.



AI-Orchestrated Ecosystems

→ AI acts as the orchestrator of ecosystem interactions.



Domain AI Product/ Agent

→ AI/Agents are the core product of a domain-bounded offering.



AI-Enriched Intelligence

→ Organizations monetize data enriched and operationalized by AI.



AI-Powered Capability

→ AI models, agents, or algorithms that partners embed into their products



Verification & Assurance Services

→ Trust becomes the product.



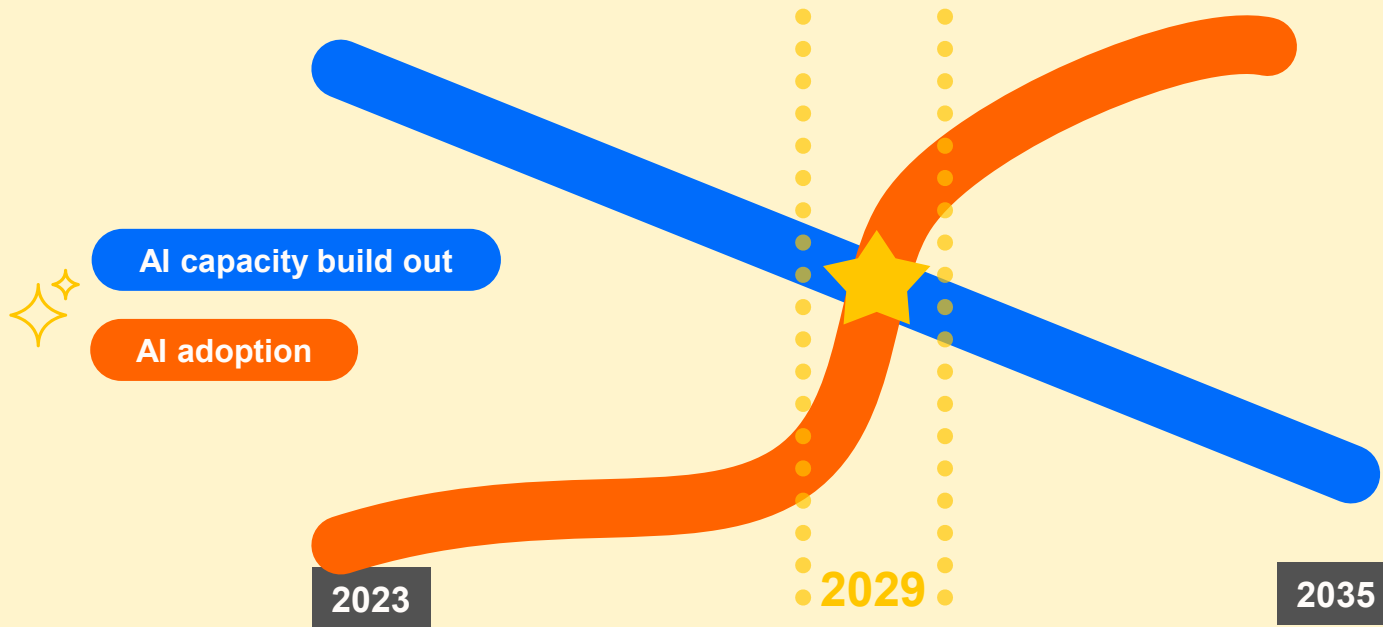
Managed Business Processes

→ Running a customer process, AI doing most of the triage.

Source: IDC's AI-Fueled Business Models: Create, Deliver, and Capture Value with AI – March 2026 (EUR154422125)



The AI Supercycle: From Strategy to Execution



3 Execution Levers:

- **Work redesign:** Move AI from pilots to core workflows. Decide explicitly where AI replaces, augments, or reshapes work.
- **Repeatable deployment:** Standardize a pre-integrated AI platform (models, data, security, governance, monitoring) to scale use cases fast.
- **Measurable ROI:** Hold AI accountable to cost, speed, and business impact. Efficiency is the floor, not the ceiling.



Thank you

Martina Longo
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From AI pilots to AI driven enterprise value

The journey to get there !!!

- Garima Singh, CTO, **PANDORA**

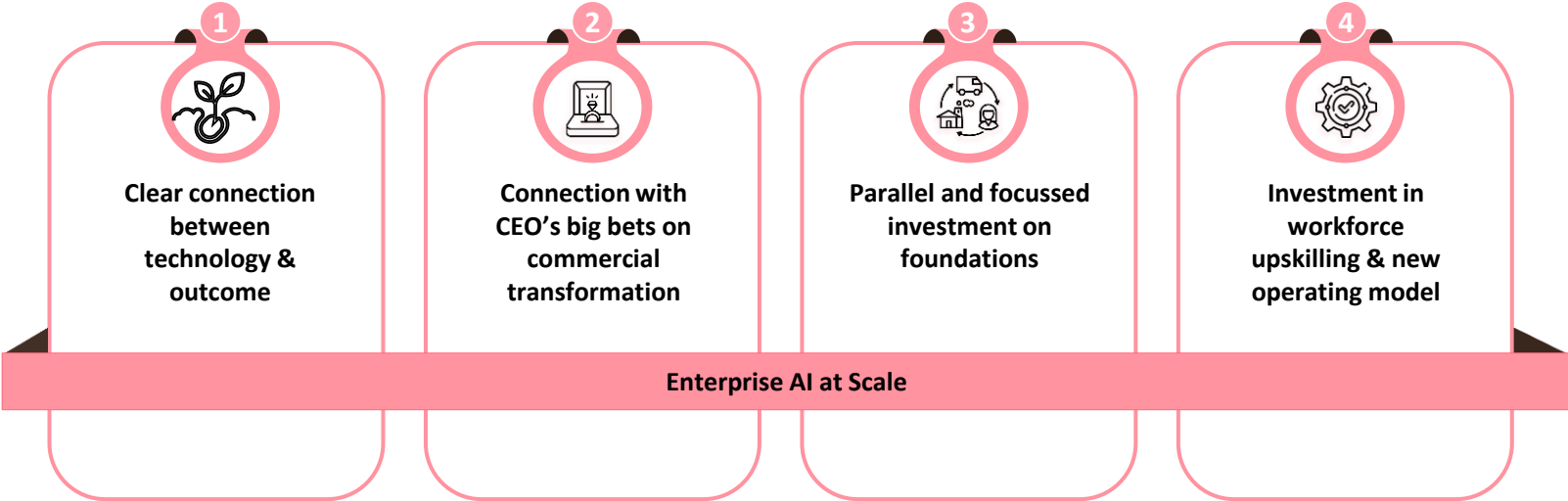


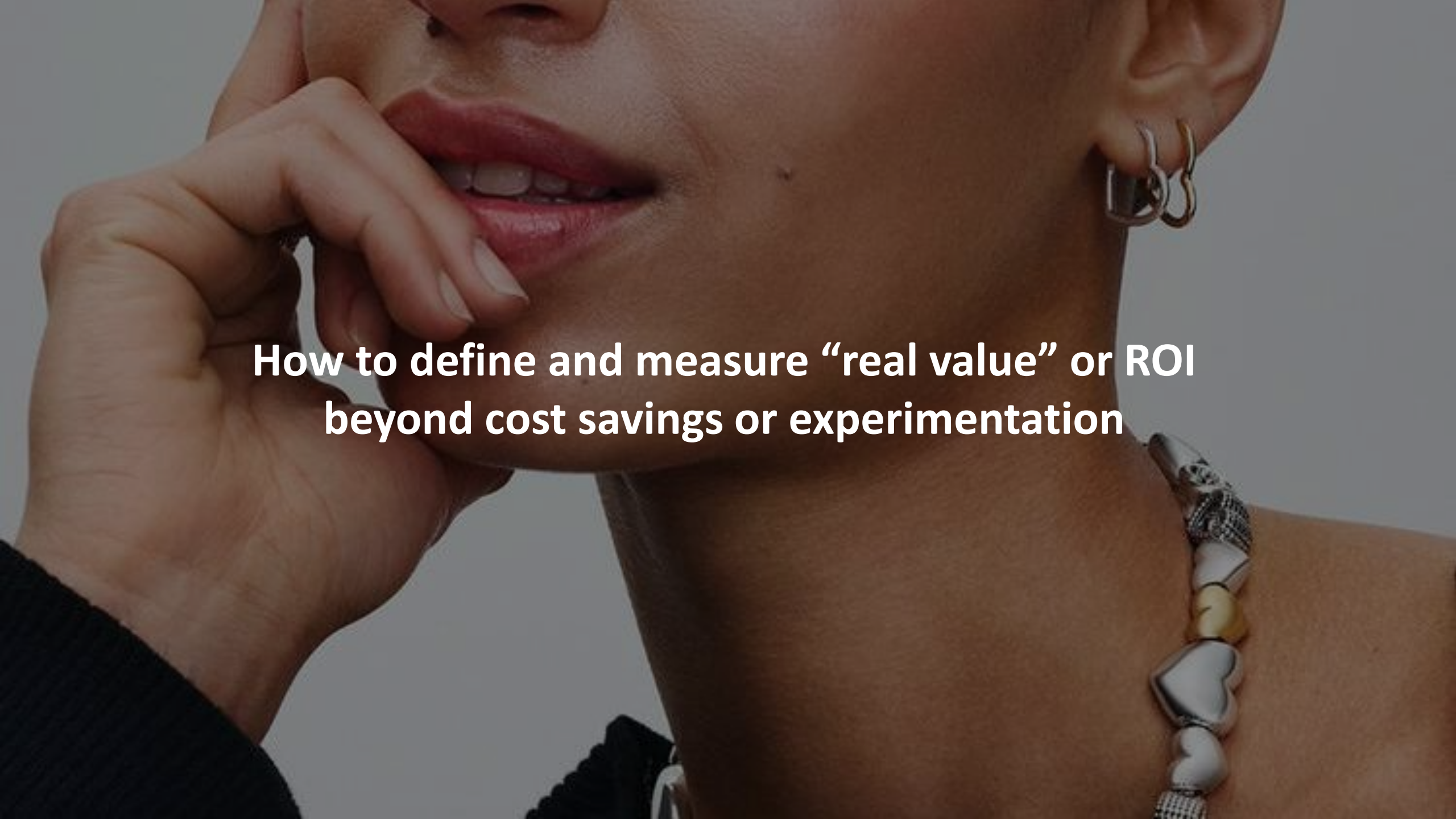
AGENDA

1. **The strategic levers - to move from exploration to scale**
2. **Foundations that needs executive attention to enable the AI scale**
3. **Navigate the AI hype with value driven mindset, real world examples**
4. **Spotlight on leadership shift, workforce management and operating model**
5. **Cross industry & cross domain learnings on scaling AI**
6. **Looking ahead 3-5 years, what's ahead of us as leaders**



STRATEGIC LEVERS – ENABLING AI FROM PILOT TO SCALE





**How to define and measure “real value” or ROI
beyond cost savings or experimentation**

FIRST STEP: DEFINING CLEAR “WHY AI” STRATEGY LINKED WITH COMPANY’S GOALS

**WORLD CLASS
RETAILER**

WIN IN ECOM

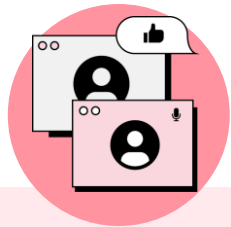
**TAILORED
EXPERIENCE**

**NETWORK
EXPANSION**



STEP 2: LINKING “WHY AI” STRATEGY with KPIS & ROI

Business growth & predictability

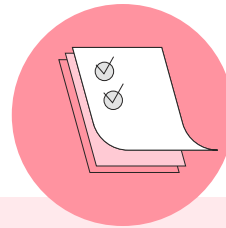


Consumers are increasingly expecting brands to demonstrate relevance and consistency in customer experiences and across channels.

KPIs:

Better customer conversion,
Seamless customer journey from product discovery to checkout

Business operational effectiveness



Colleagues are becoming more tech- and data-driven showing increased interest in using tech incl. AI to augment how they deliver their work.

KPIs:

Throughput in manufacturing products,
Effective workforce management,

Business Innovation

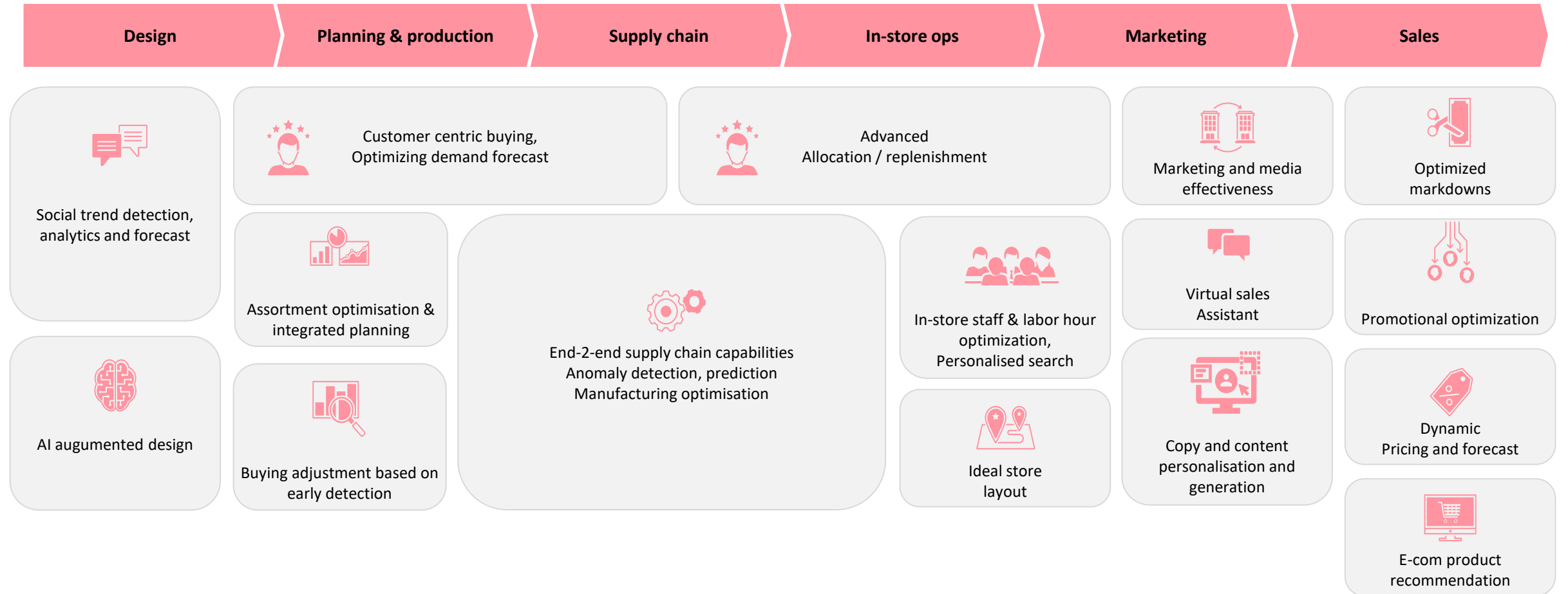


Companies with high levels of business predictability and operational effectiveness, can make better informed decisions, allocate resources effectively and set the organization towards creativity instead of day-to-day operational work

KPIs:

New product development

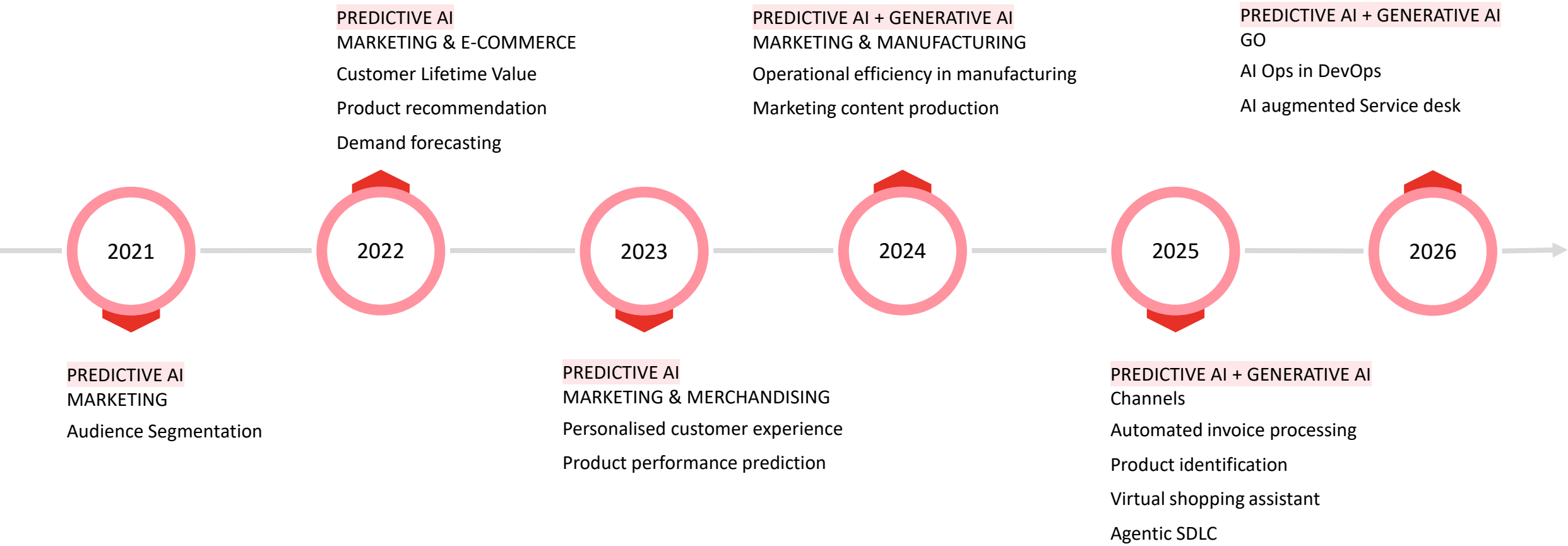
STEP 3: IDENTIFICATION OF AI OPPORTUNITIES ACROSS THE VALUE CHAIN



Gen AI + Agentic AI Foundation for Enterprise AI

STEP 4: A CLEAR & FOCUSED RUNWAY

A mix of short term impact vs long term bets



A close-up photograph of a woman's face, focusing on her eye and ear. She is wearing a diamond bracelet on her left wrist. The image is dimly lit, with the text overlaid in white.

“Foundation”

Make or break for enterprise scale of AI

FOUR ESSENTIAL FONDATIONAL ELEMENTS FOR AI SCALE



Strategic Data domains & clear lifecycle management strategy

Operating model around data (Federated/Central)

**Enterprise foundational platforms:
Data/AI platform, Enterprise context DB, Agentic
orchestration etc**

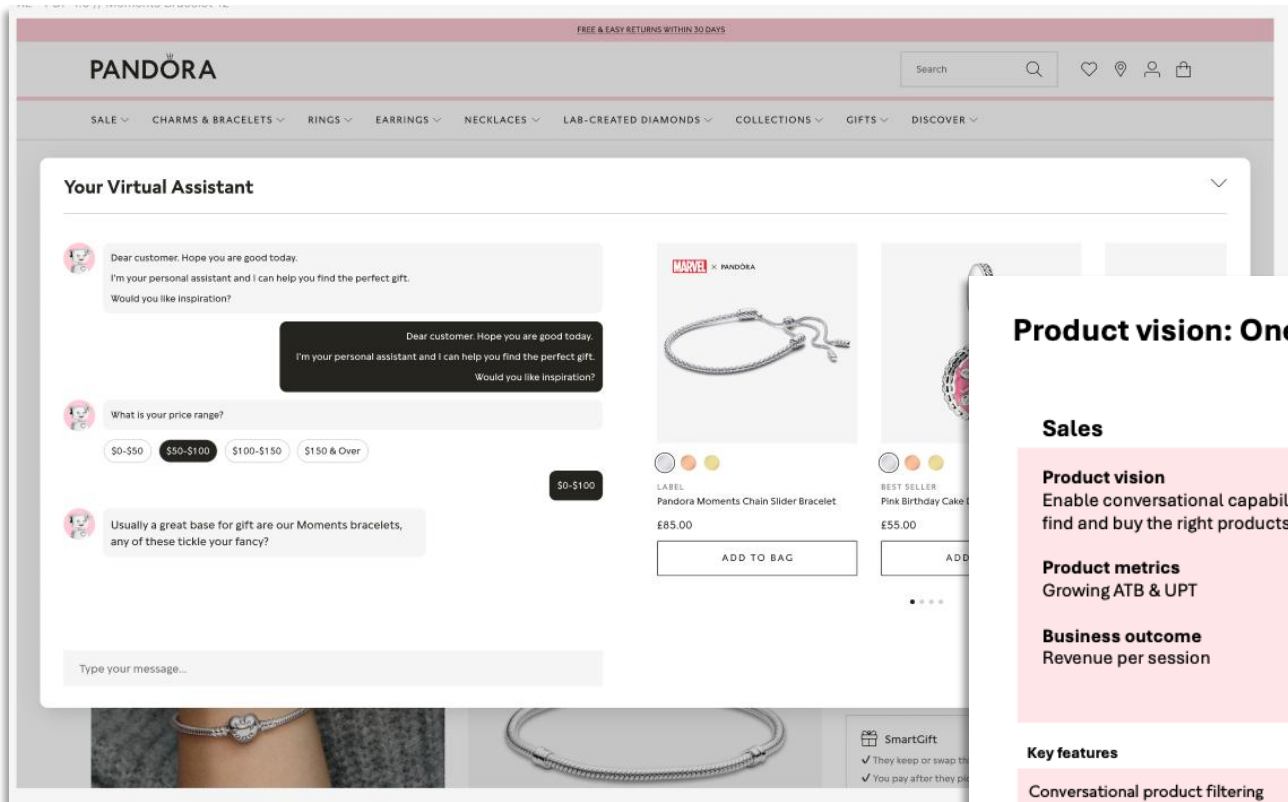
**AI/Data Governance and guardrails
around AI tools**



LETS HAVE A LOOK AT REAL LIFE EXAMPLES !!!

*Its NOT about adopting tool or technology,
Its about how to leverage AI as strategic advantage*

PANDORA VIRTUAL ASSISTANT – SALES AND SERVICE



Product vision: One bot, two use cases

Sales

Product vision
Enable conversational capabilities for customers to find and buy the right products

Product metrics
Growing ATB & UPT

Business outcome
Revenue per session

Key features

Conversational product filtering

Add to basket

Recommendations

Context

Customer service

Product vision
Enable conversational capabilities to support customer shop and with questions post-purchase

Product metrics
Increase case deflection rate (BellaBot 30%)

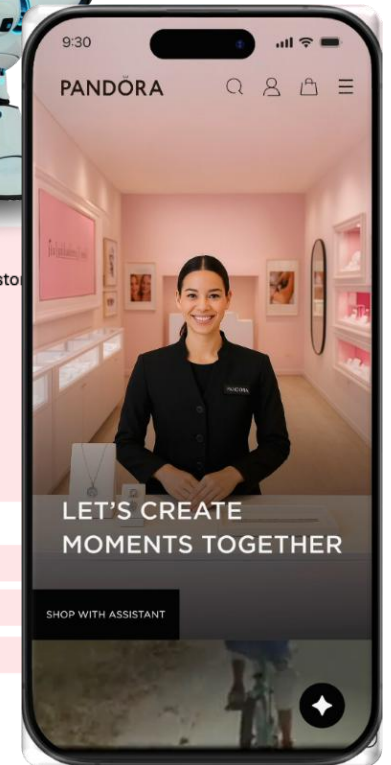
Business outcome
Reduce cost per contact

Key features

FAQs

Where is my order

Order amendments



AGENTIC DEVOPS & SERVICE OPERATIONS

 Claude



 GitHub Copilot

 servicenow®

- Proven productivity gain in software development lifecycle and DevOps by 30%
- Major breakthrough is legacy migration & documentation

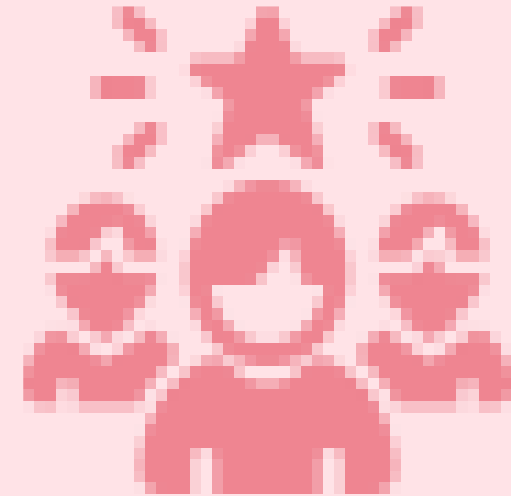
- Automated ticketing solution by 30%
- Major breakthrough is speech-based service desk, with multilingual support

SPOTLIGHT
ON
LEADERSHIP, CULTURE &
WORKFORCE CHANGE
MANAGEMENT



BARRIERS THAT BLOCKS AI ADOPTION

- Anxiety about AI and its impact on their current role
- AI literacy to enable well informed choices and adaption
- Fear of failure
- No clarity on transformation roadmap, investment and commitment from top management





LEADERSHIP BEHAVIOR THAT MAKES A DIFFERENCE

- Extra efforts in overcommunicating the “WHY” , “WHAT” , “HOW” and “WHEN”
- Place AI as workforce amplifier, instead of alienator
- Celebrate early adaptors, but also bold movers
- Role based AI literacy and training program, along with role modelling on learning new tech
- Move AI from “IT initiative” to “Enterprise priority”



Learnings so far & Looking ahead !!!



LEARNINGS SO FAR

- **Focus on outcome instead of tool or tech, with clear ROI**
- **Foundation & reimaging business processes are essential prerequisite for success of enterprise AI**
- **Balanced pace with AI transformation**
- **FOCUS with few tools and initiatives, with a mix short term to long term impact**
- **AI literacy, catered for roles is the key for mass adoption**

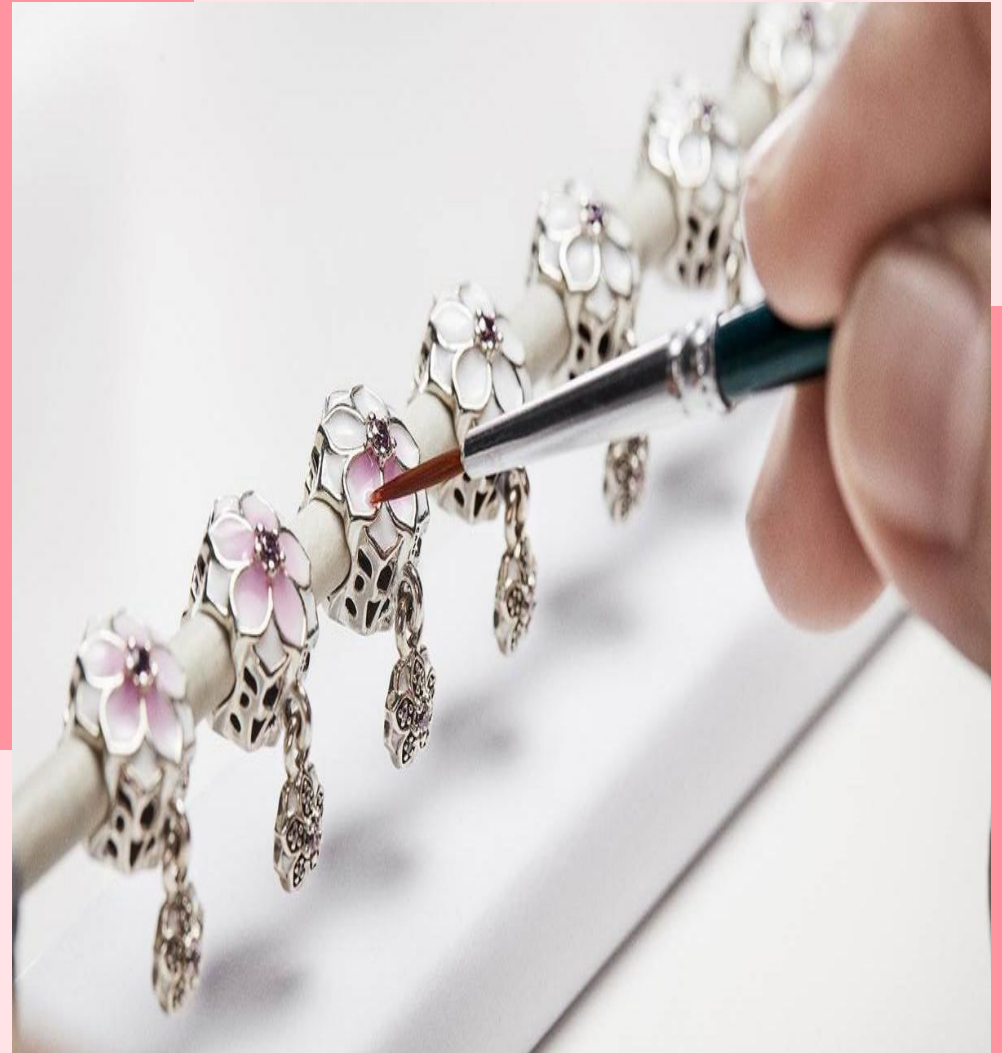
WHATS AHEAD OF US AS LEADERS TO THINK ABOUT

- The future question isn't "which model or Tool?" but "where does intelligence sit in our digital landscape to give us extra factor in market?"
- Future workforce, talent strategy & pipeline
- Flexible digital eco system, with strong foundation
- Cost discipline & governance
- Security will become even more essential than ever



“Transformation is not a destination; it’s a journey of continuous growth !!”

THANK YOU !!!



Fireside Chat

Garima Singh, CTO

Pandora

Shivaun Anderberg, Head of Data & AI, Nordics

Publicis Sapient



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Data How are you approaching the management of AI outputs?

Orchestration Are you seeing improvements from orchestrating different AI tools and Agents together?

Change What tools are actually helping achieve adoption and process change?

Thank you for joining!

A recording of the webinar will be shared with you shortly.



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