Shift Happens

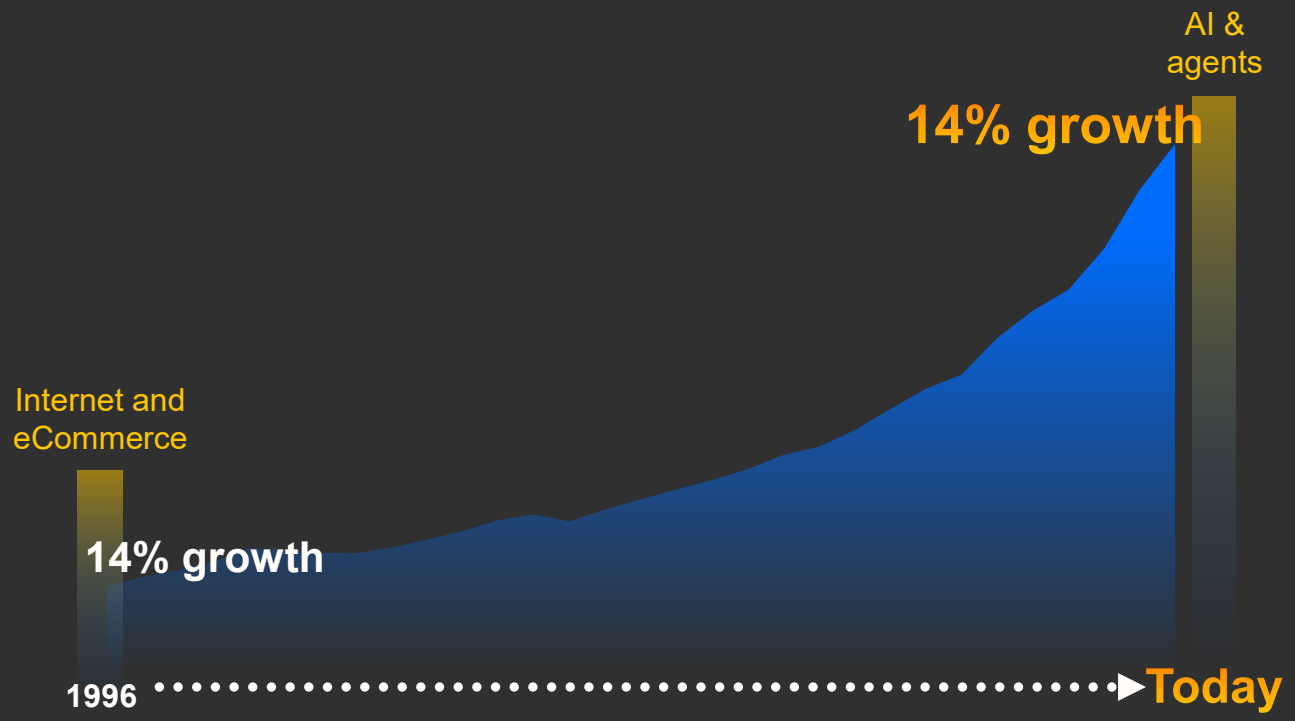
Closing AI Execution Gaps

Andrea Siviero

IDC Research VP
asiviero@idc.com

IDC CIO Summit Adriatic – October 12, 2026

Strongest **IT spend** since 1996



Market impact

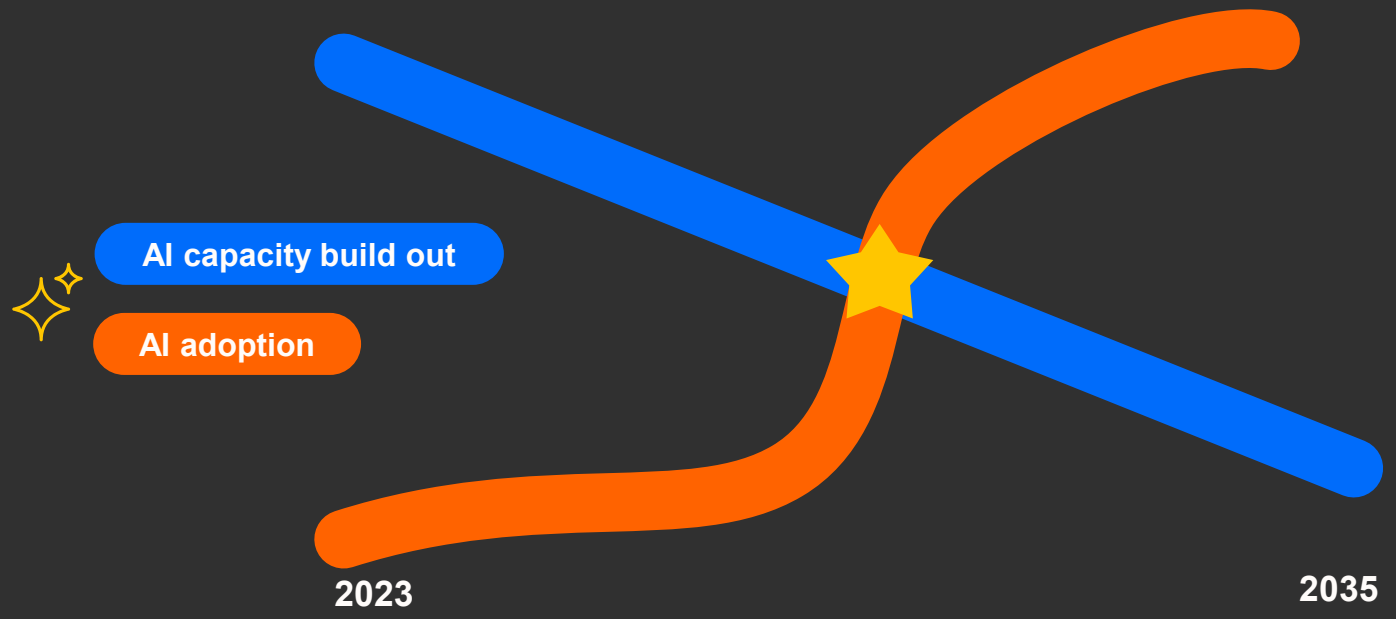
1996
14%
On $700 billion market

2025
14%
on $4.2 trillion market

CEE Market +8% on $115 billion

© 2026 IDC
Private and confidential. Not for public consumption or distribution
Source: IDC Worldwide Black Book 31-March-2026, Forecast

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?

© 2026 IDC
Private and confidential. Not for public consumption or distribution

Leading within the AI supercycle?

01 AI Supercycle Readiness

02 The Execution Gap

03 Moving from experimentation to production

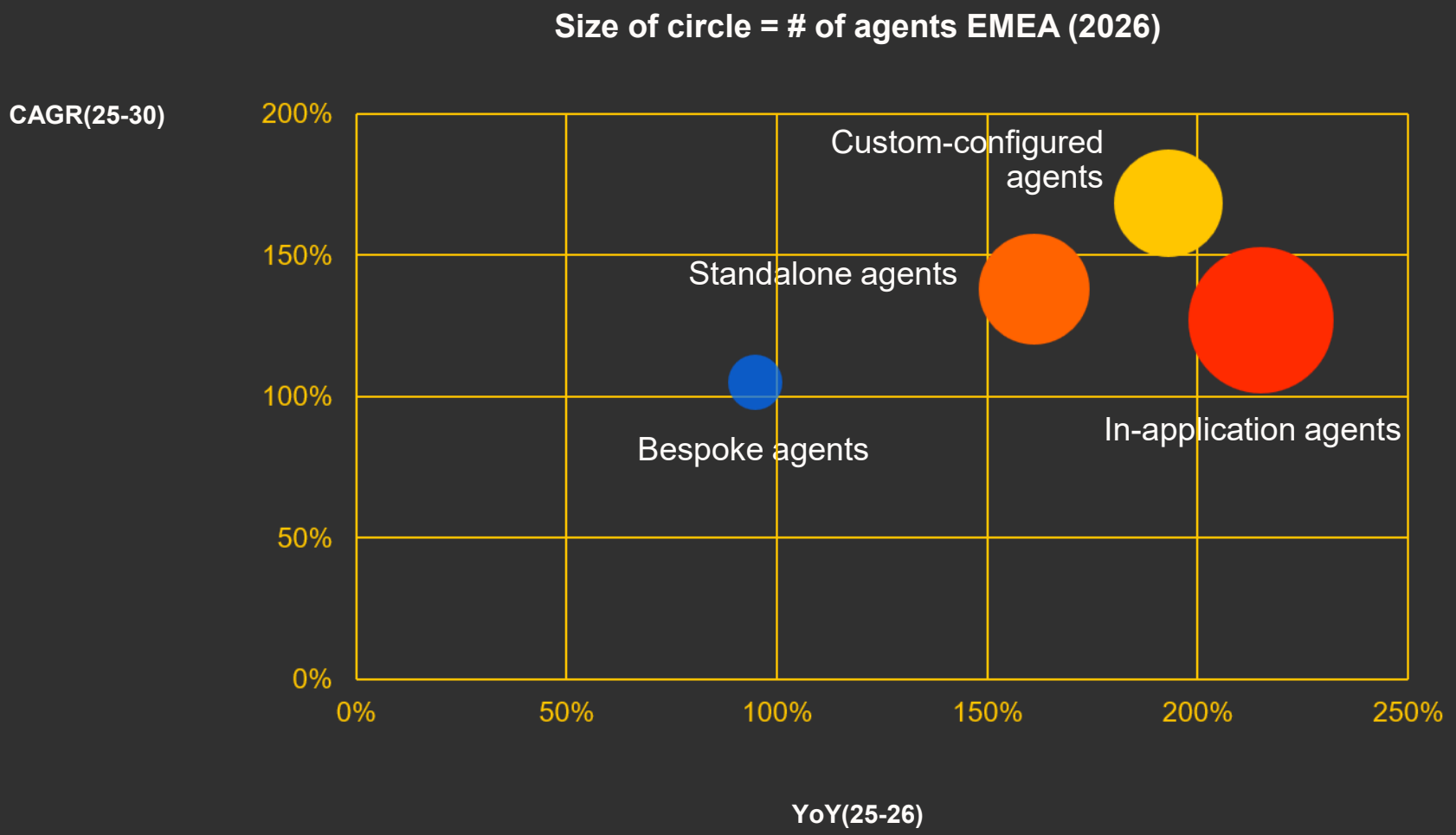
© 2026 IDC

Private and confidential. Not for public consumption or distribution



The Market Innovation pace is going fast

630M **Agents** in EMEA by 2030

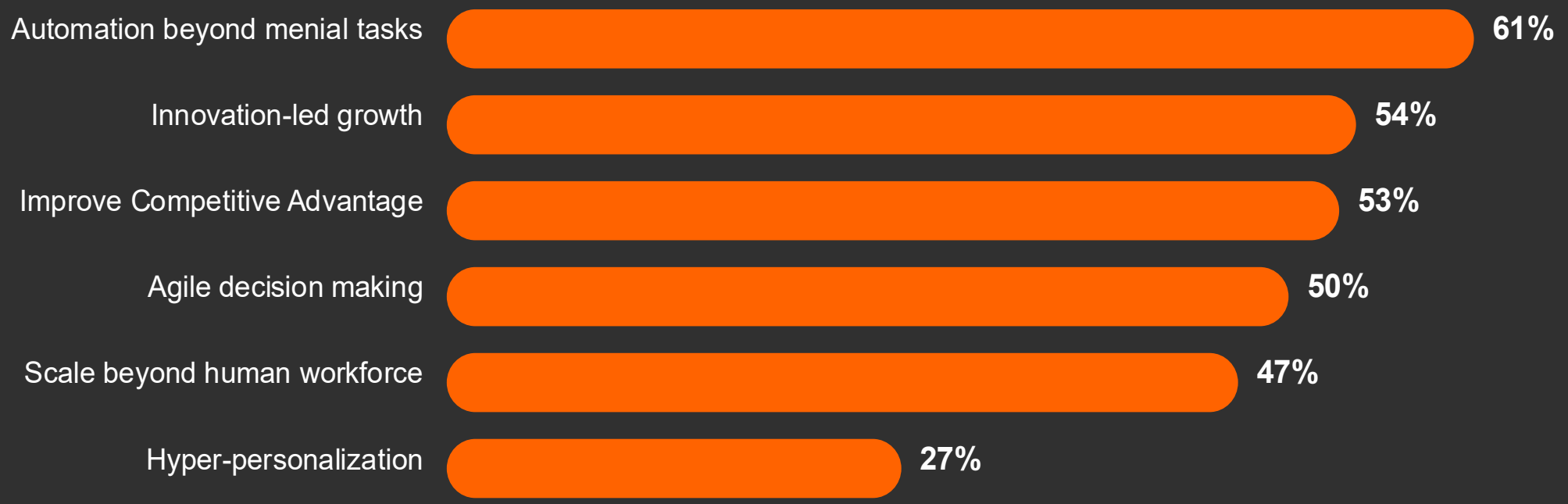


© 2026 IDC
Private and confidential. Not for public consumption or distribution

Source: Worldwide Agentic AI Adoption Guide, IDC, June 2026

AI Agents shift strategic priorities

GenAI changes how organizations create. Agentic AI changes how they act.



Source: AI use case study, IDC, Jan 2026 n= 975

© 2026 IDC

Private and confidential. Not for public consumption or distribution

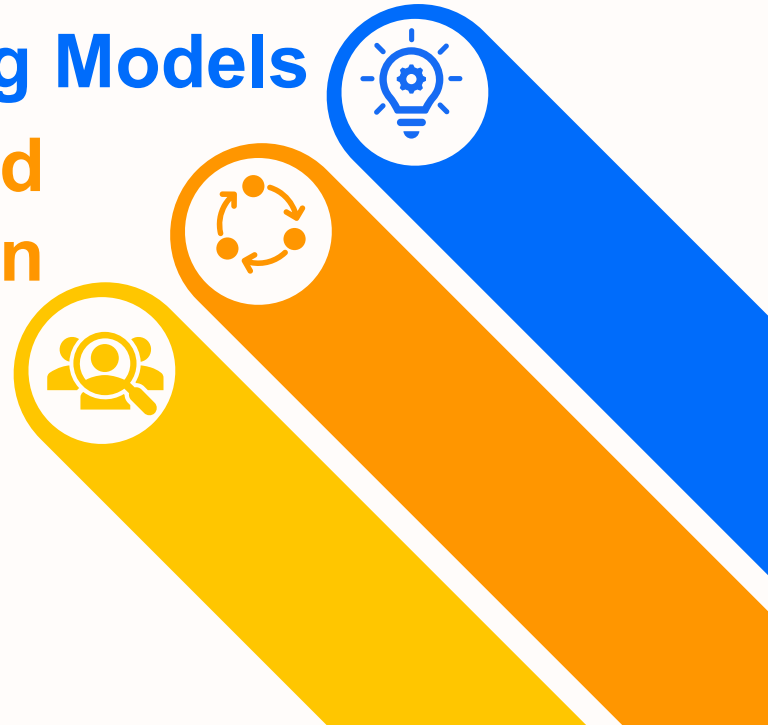
All EMEA CEOs believe AI will offer their organization a chance to **reinvent their business model** over the next 3-5 years

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

New Operating Models

Business Partner and Ecosystem Orchestration

Customer Engagement

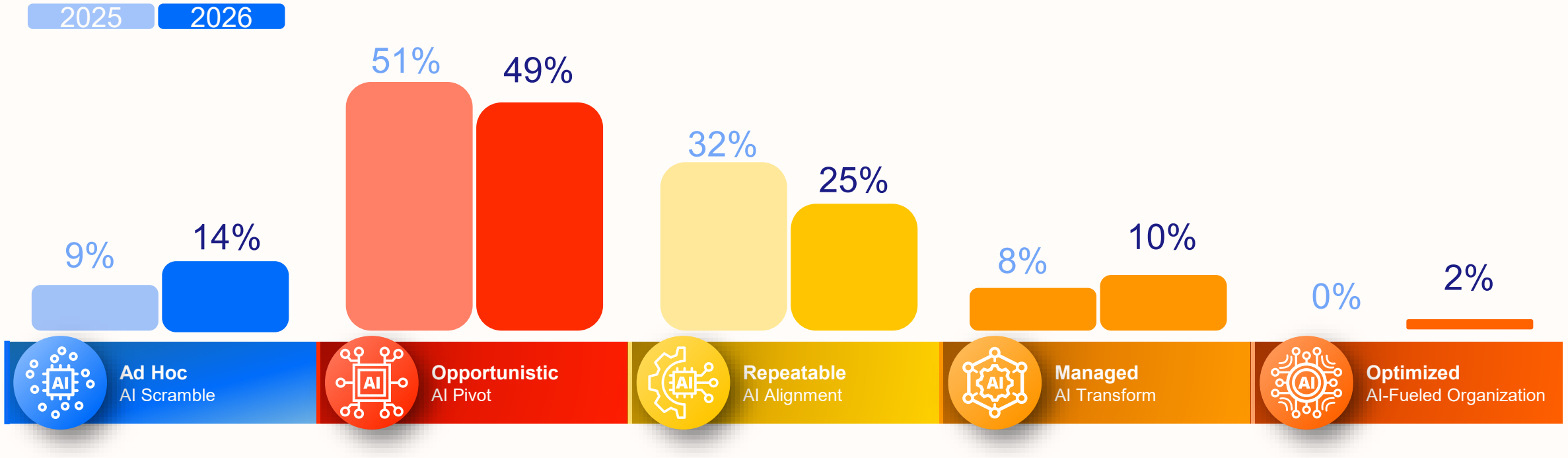


© 2026 IDC


You have the mandate.
Execution is where it breaks down.

AI Value is blocked by Execution, not Interest. Organizations are in the AI pivot.

IDC EMEA AI Fueled Organization Maturity Model Benchmark 2.0, 2026



© 2026 IDC

Source: IDC MaturityScape Benchmark: The AI-Fueled Organization 2.0, May 2026, EMEA n= 583

What Creates the Execution Gap

63%

of EMEA Companies are still in early stages of AI Maturity

Source: IDC MaturityScape Benchmark: The AI-Fueled Organization 2.0, May 2026, EMEA n= 583

WHY AI PROJECTS FAIL

01 **Data Quality**

02 **AI Model Performance**

03 **Governance Concerns**

04 **Low ROI**

05 **Change Management Failure**

Source: IDC's AI Business Trends Survey, August 2026, EMEA Sample N= 673

© 2026 IDC

Private and confidential. Not for public consumption or distribution



1. Start with Data

"Data is the light in the coal mine"

Stephen Minton, IDC Research GVP

AI Without Trust Is a Liability

Arup lost $25mn in Hong Kong deepfake video conference scam

UK-based engineering group identified as target of fraud that used digitally cloned CFO to trick staff



Companies are at growing risk from scams using hyper-realistic video, audio or other images generated using artificial intelligence © Getty Images

Cheng Leng and **Chan Ho-him** in Hong Kong

Published MAY 17 2024

101

OECD.AI Policy Observatory GPAI Global Partnership

Home > AIM > AI-Generated Voice Deepfake Enables €36 Million Bank Fraud in Italy

AI-Generated Voice Deepfake Enables €36 Million Bank Fraud in Italy



The information displayed in the AIM should not be reported as representing the official views of the OECD or of its member countries.

In February 2026, fraudsters used AI to clone the voice of a trusted lawyer, deceiving Fideuram's then-president Paolo Molesini via a fake WhatsApp message and phone call. This led to unauthorized transfers totaling €95

AI principles

Robustness & digital security

Transparency & explainability

Industries

Financial and insurance services

Affected stakeholders

Business

Harm types

Economic/Property

AI system task:

Content generation

© 2026 IDC

2. Develop a clear Trust Strategy

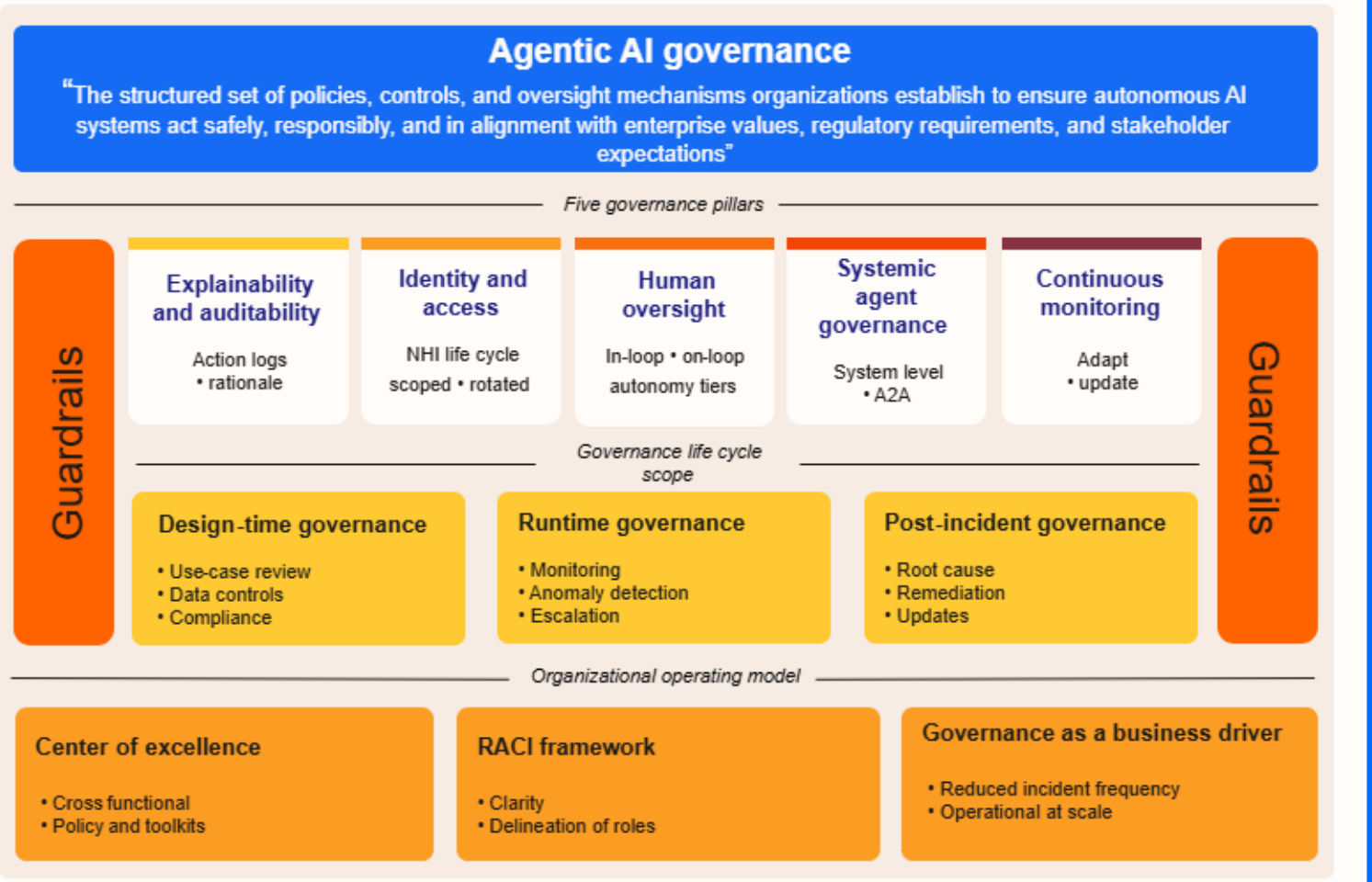
01 Who is acting?

02 What may agents do alone?

03 Can we show why?

04 Does it still behave?

AI Governance Is Complex but Necessary



1 **Pillars**

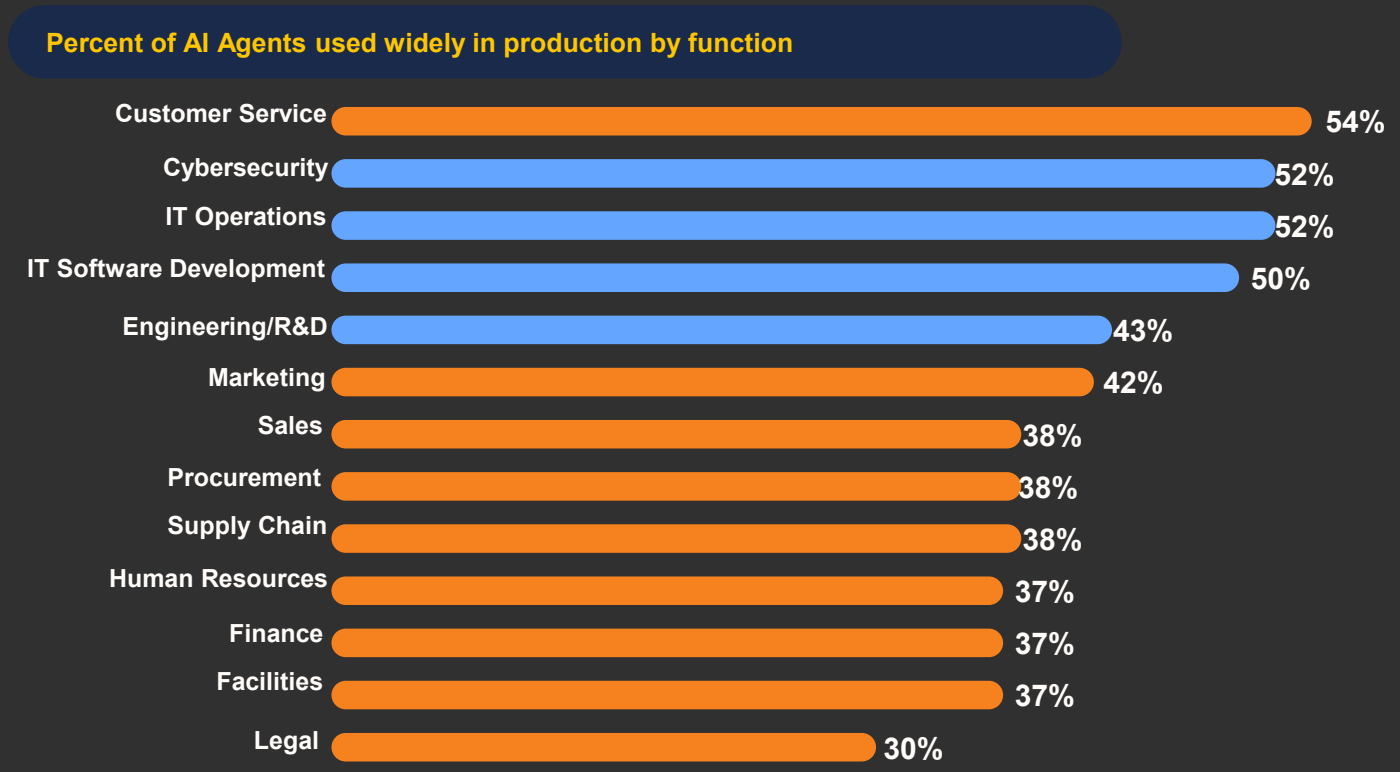
2 **Life Cycle**

3 **Operating Model**

Source: IDC's Autonomy on a Leash: A Framework for Agentic AI Governance – August 2026, EUR154859826

© 2026 IDC

3. Agentify existing **business processes**



Advice

Work Redesign

Redesign workflows and define where AI replaces or augments human work before deploying

Repeatable Deployment

Standardize pre-built workflows and pre-integrated architectures so scaling doesn't mean starting from scratch

Source: AI Leaders View Of Functional Agentic Initiatives, IDC. March 2026. Q: What is the current status of AI Agent implementations in each of these functional areas? n=984

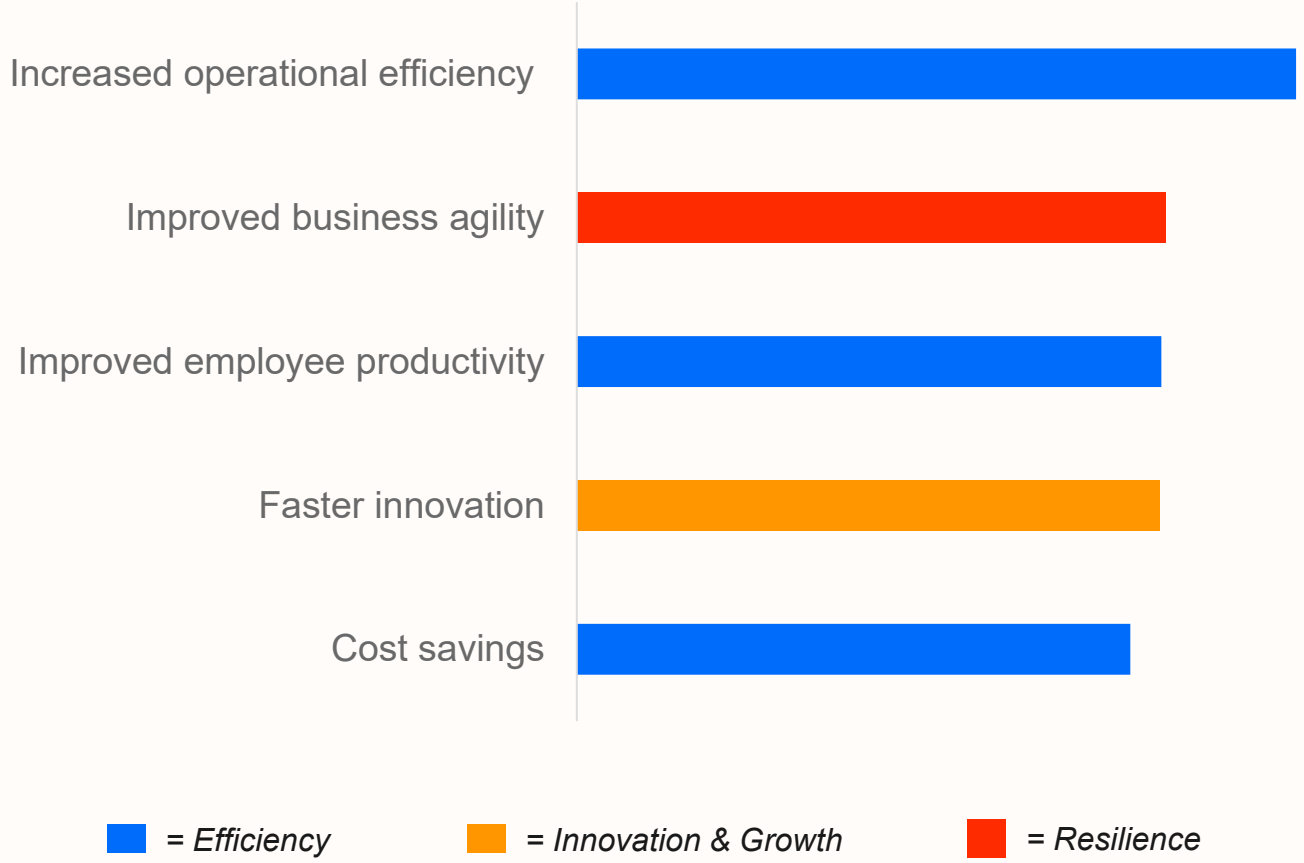
© 2026 IDC

Private and confidential. Not for public consumption or distribution

Where AI Delivers Today: Efficiency First

What are the expected main business benefits to your organizations from Agentic AI implementation?

(Top 5 Only)

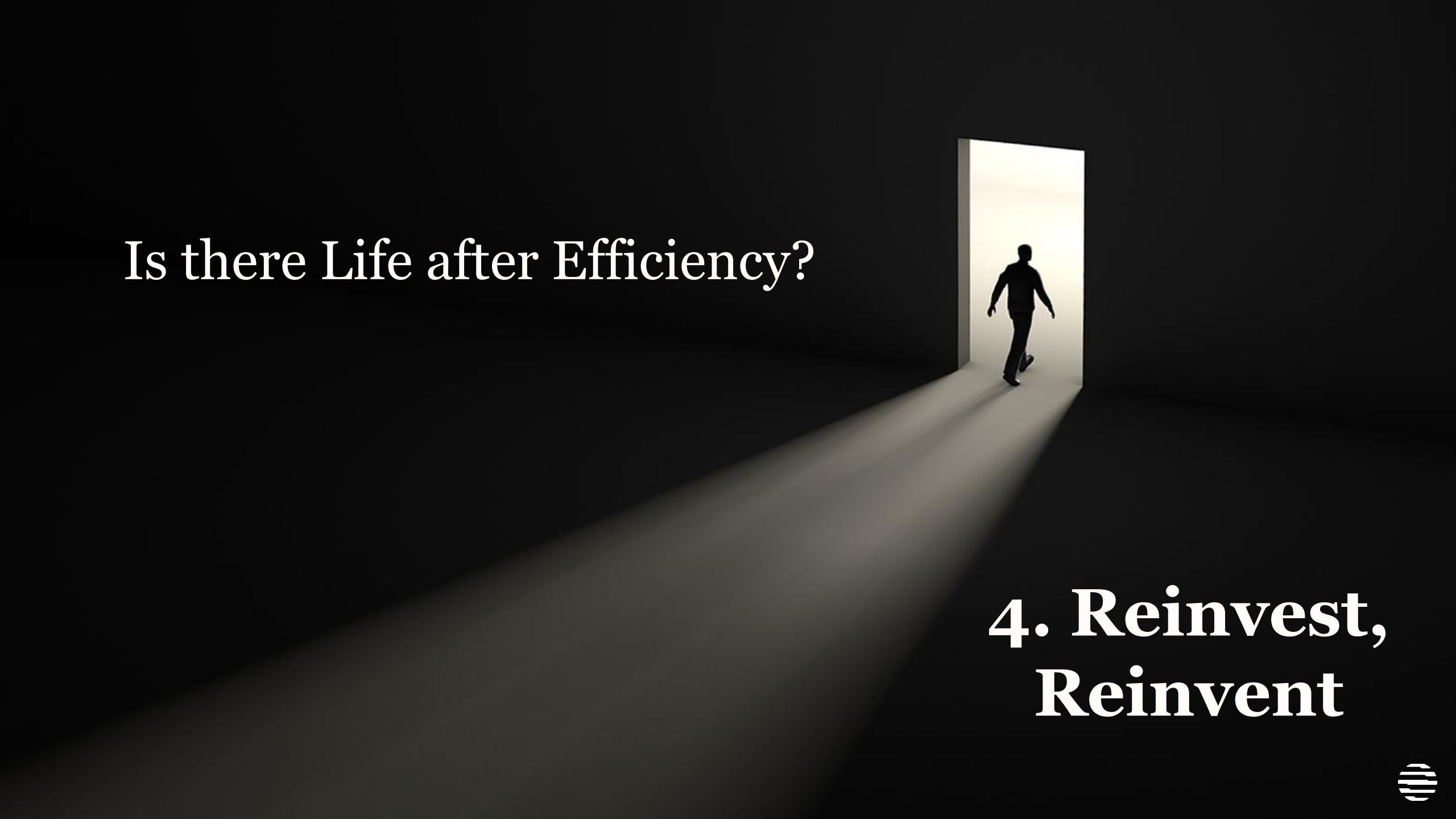


Source: IDC's Agentic AI Functional Use Case, April 2026, EMEA N=652

© 2026 IDC

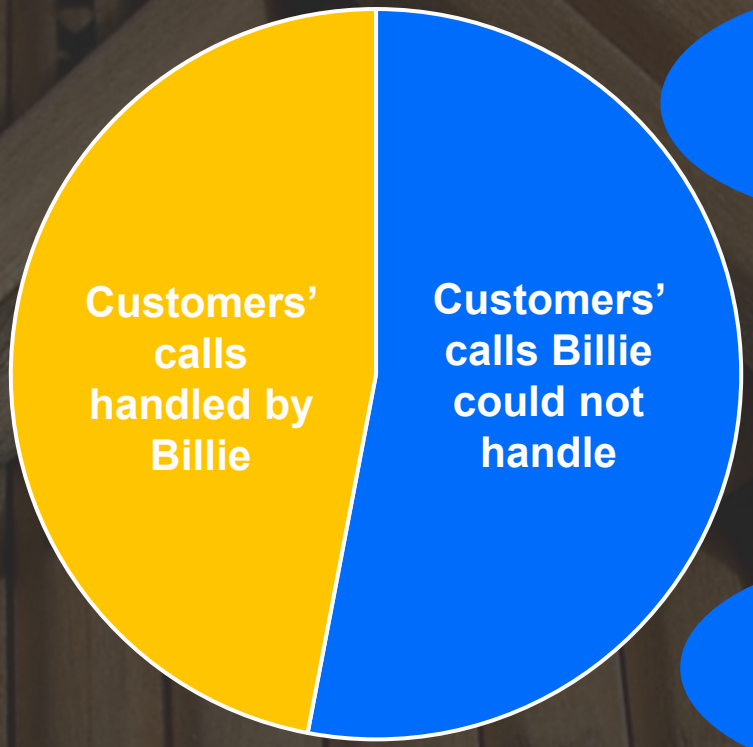
Distribution is forbidden without written consent of IDC. All rights reserved.

Is there Life after Efficiency?



4. Reinvest, Reinvent

In 2021 IKEA introduced Billie



Which desk color would match?

How should I organize my home office?

What works well in a small living room?

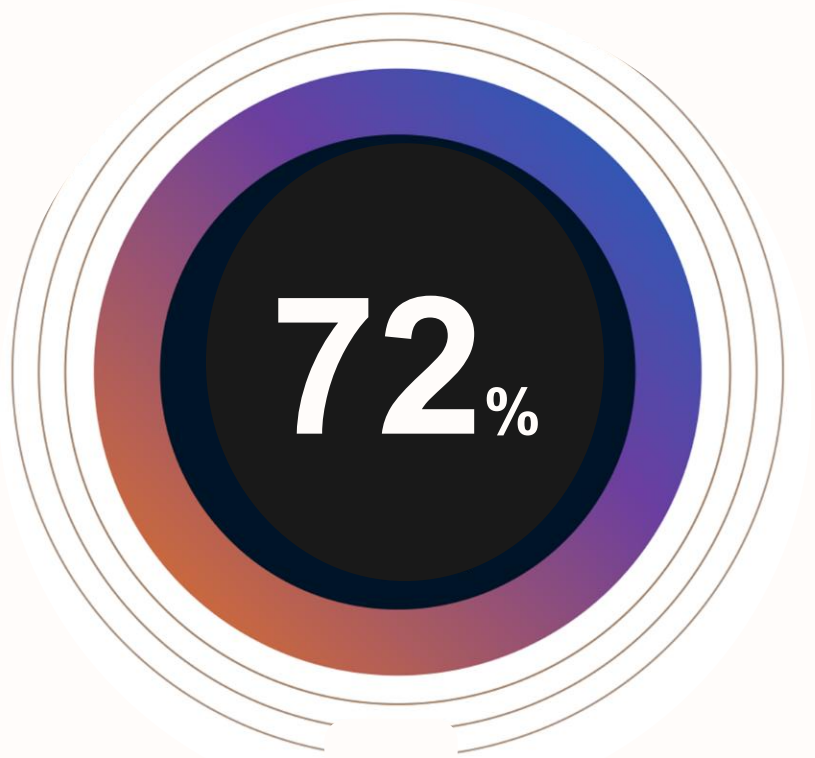
8,500 Call Center Operators

Interior Designers

With AI, IKEA unlocked a €1B-scale human-led service business

Source: Reuters

Despite cost control concerns, AI spending remains a must-do



of EMEA organizations
ran over budget on agent spend

Where does the extra AI budget come from?

62% sits in central IT budget

From other existing Digital Transformation initiatives

New budget from CFO

How do they mitigate cost overruns?

49% imposed hard spend limits

44% cut headcount to compensate

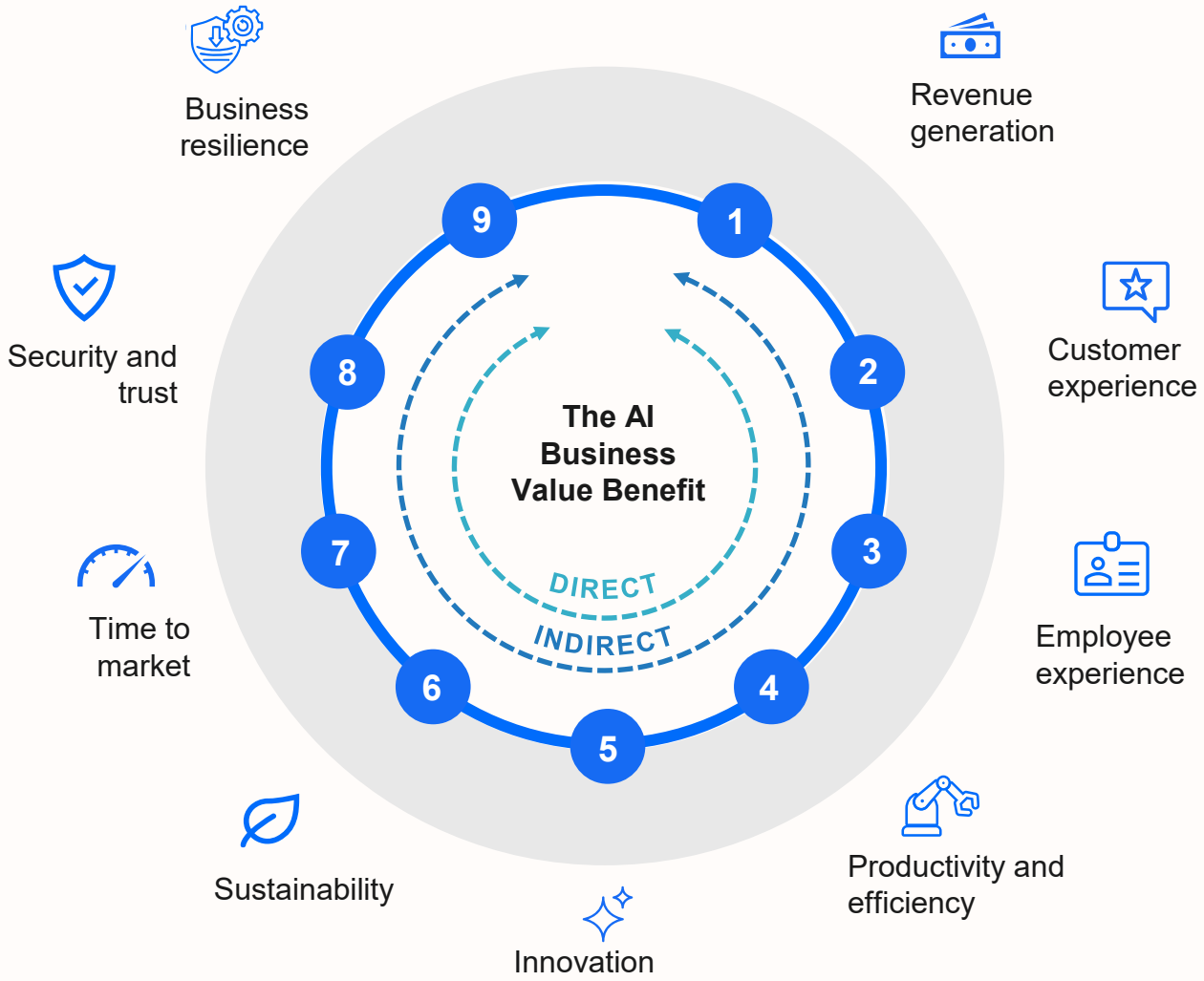
Source: IDC Future Enterprise Resiliency & Spending Survey, Wave 4, August 2026, EMEA n= 479; IDC Global Future of Work Survey, 2026, EMEA n= 474

© 2026 IDC

Distribution is forbidden without written consent of IDC. All rights reserved.

5. Prove the Business Value of AI

IDC's AI Business Value Income Framework



Source: IDC's From AI Return on Investment to Business Value: A Practical ROI and Business Value Calculation Framework for IT Leaders

© 2026 IDC

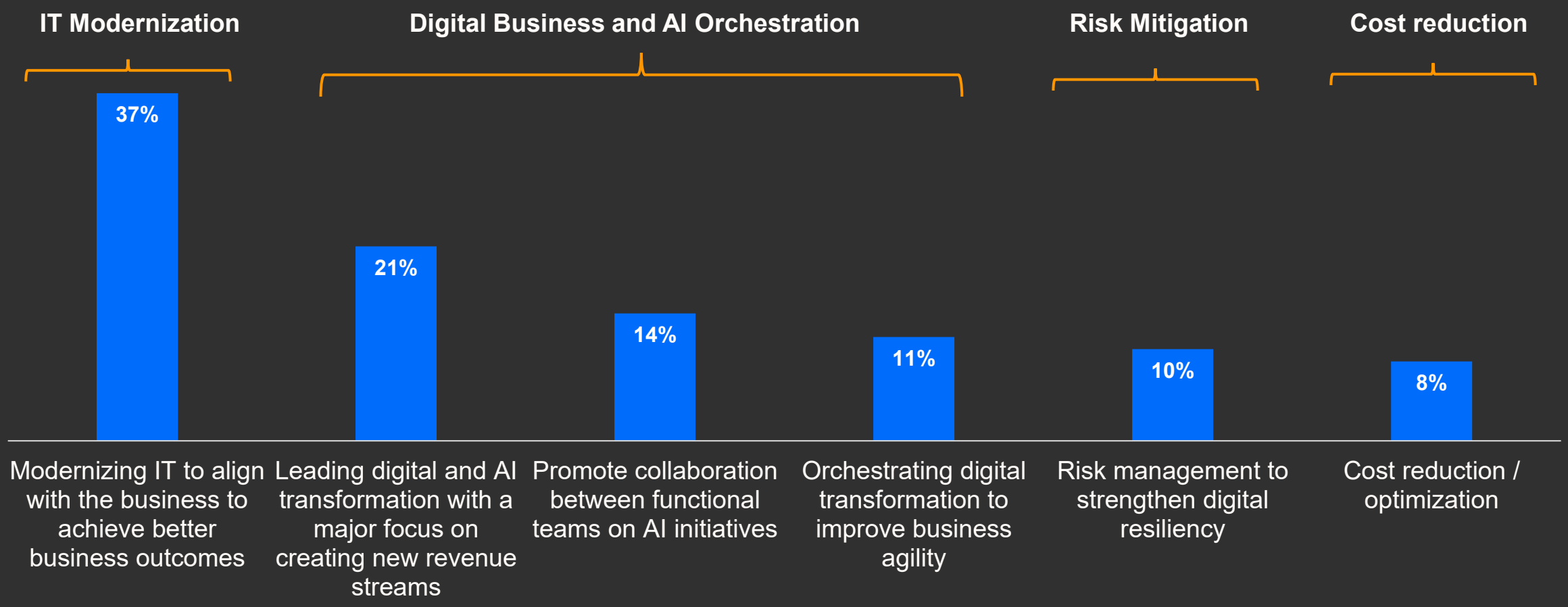
Private and confidential. Not for public consumption or distribution



© 2026 IDC
Private and confidential. Not for public consumption or distribution

What CEOs think about you

Which statement best represents the CIO's primary focus in your organization today? (% of respondents)



© 2026 IDC

Private and confidential. Not for public consumption or distribution

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

“We've always been **the orchestrator**, but the **orchestra is getting bigger**. On the AI front, we must help our peers build their **AI muscle** and understand change management.”

– CIO, Global Manufacturing Company

© 2026 IDC

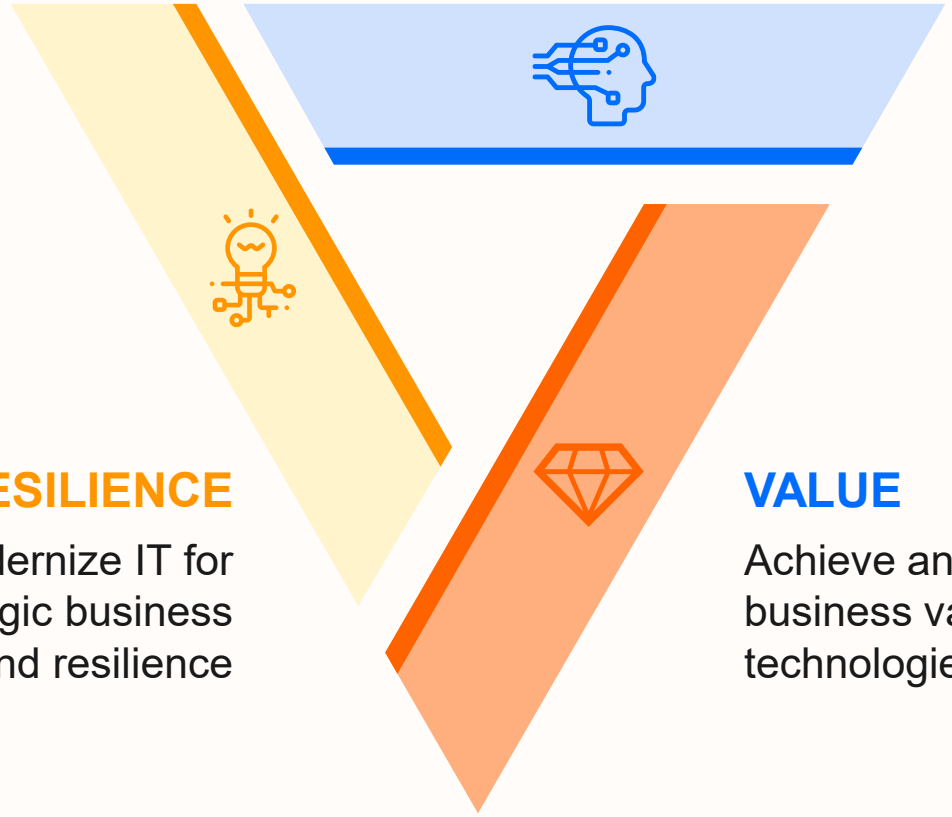
Distribution is forbidden without written consent of IDC. All rights reserved.

The CIO of the future

Architect of…

WORKFORCE

Orchestrate AI-fueled workforce transformation and change management



RESILIENCE

Modernize IT for strategic business alignment and resilience

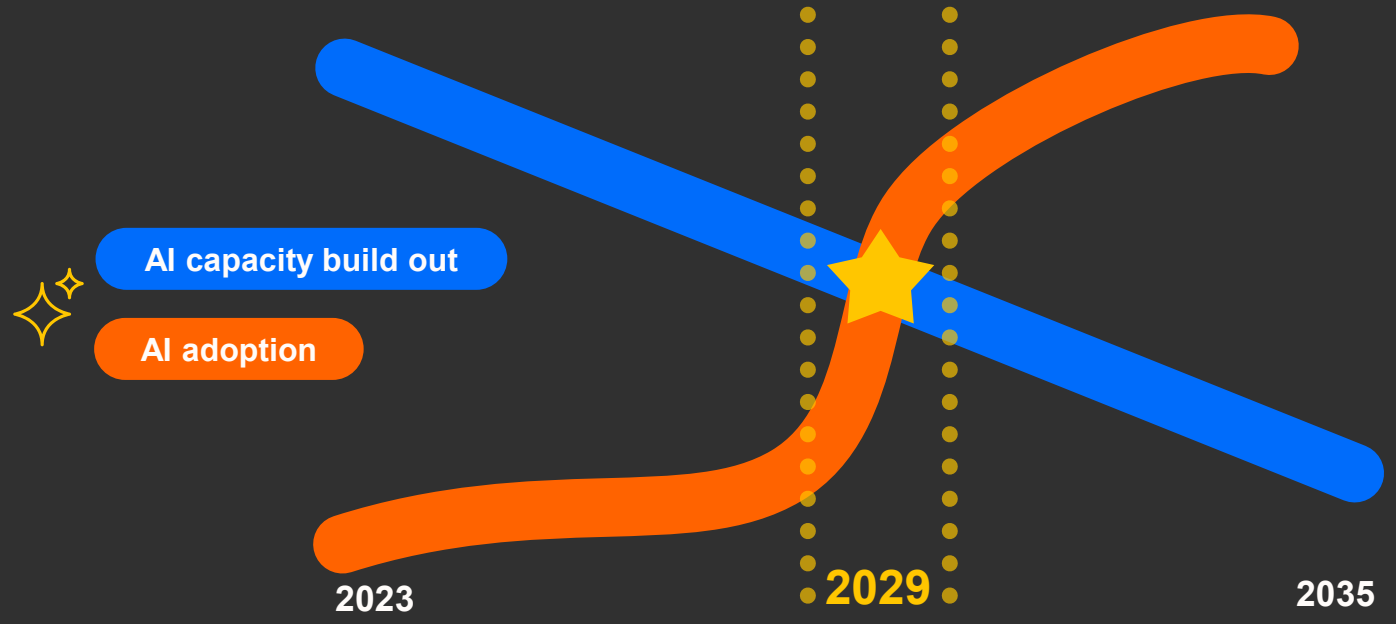
VALUE

Achieve and demonstrate business value from digital technologies

© 2026 IDC

Private and confidential. Not for public consumption or distribution.

The AI supercycle: Strategy is set. Execution is on You!



01 Start with Data
Audit your top use cases for data readiness before you buy more tools.

02 Develop a clear Trust Strategy
Govern every AI system and agent with risk tiers, ownership, and clear escalation.

03 Agentify existing processes
Redesign workflows first, then scale agents with repeatable deployments.

04 Reinvest, Reinvent
Ring-fence a share of efficiency gains to fund new business models.

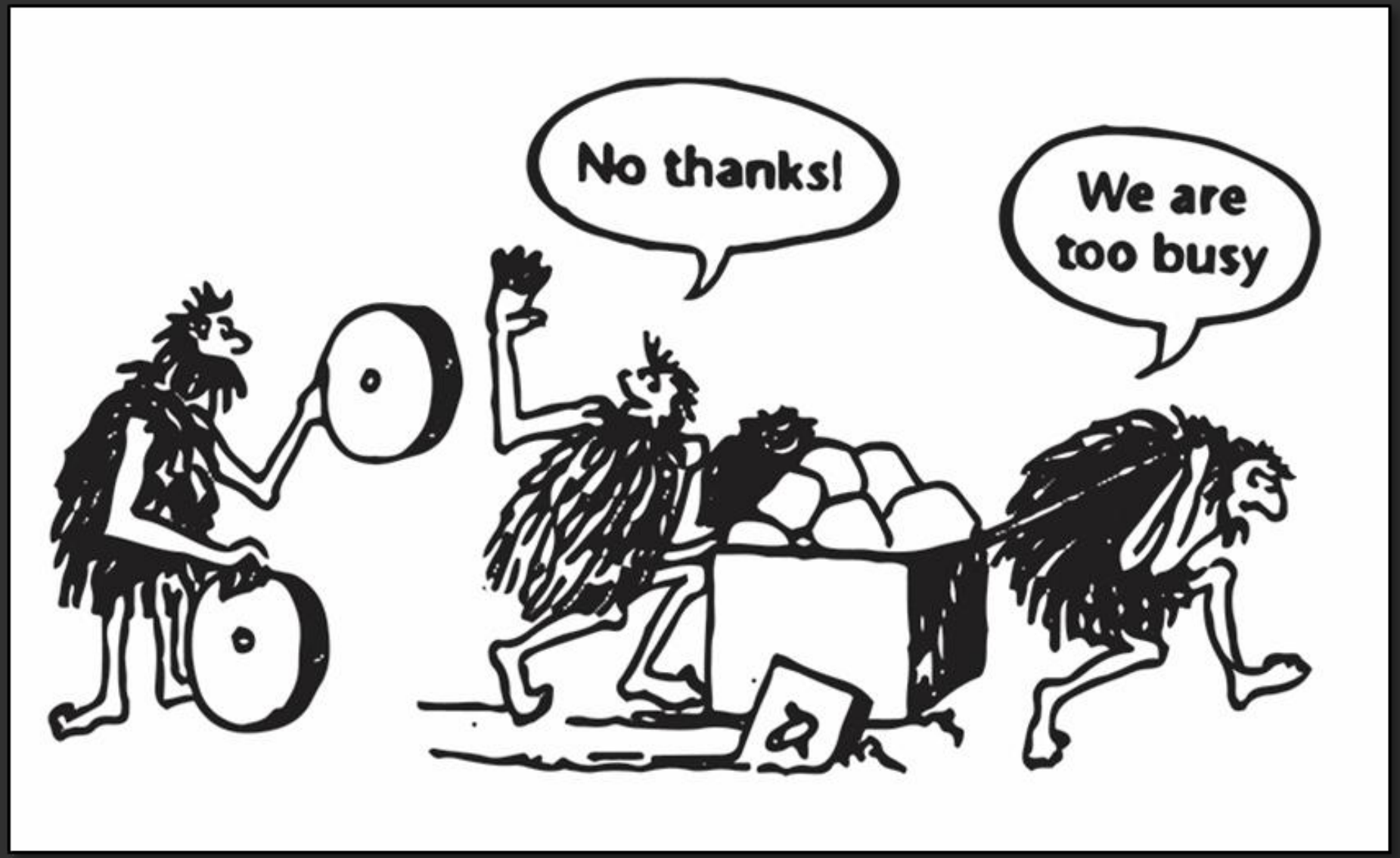
05 Prove the Business Value of AI
Measure against a baseline, and scale or stop every pilot within 90 days.

© 2026 IDC
Private and confidential. Not for public consumption or distribution

“

Some changes are so slow that you don't notice them, others are so fast that they don’t notice you.

© 2026 IDC
Private and confidential. Not for public consumption or distribution



© 2026 IDC
Private and confidential. Not for public consumption or distribution

“

You can train a chicken to climb a tree, but it's better to hire a squirrel.

© 2026 IDC

Private and confidential. Not for public consumption or distribution

> Those who solve problems stay, those who create emotions stay, those who do things well stay.

© 2026 IDC

Private and confidential. Not for public consumption or distribution

Shift Happens!*

Andrea Siviero

asiviero@idc.com

**Title AI-generated*