

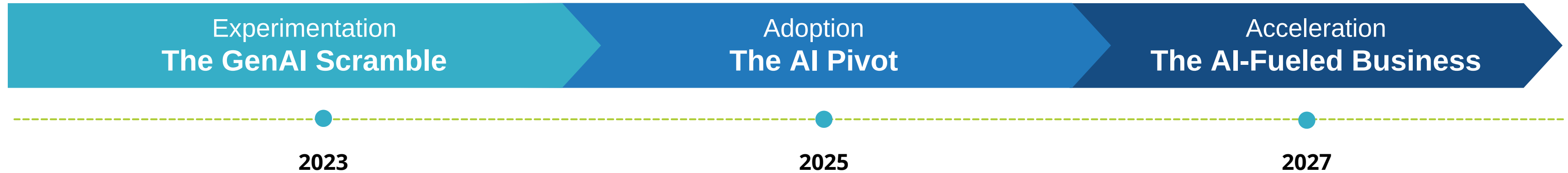


EMEA Leaders in the Age of AI Everywhere

Giulia Carosella, Andrea Siviero,
Thomas Meyer, Meike Escherich,
Duncan Brown
November 2024



Executive summary



- The past two years have been marked by the rising enthusiasm of business executives for the opportunities and promises of GenAI to reimagine their businesses and operating models and drive sustainable business value. What stands out in EMEA is that 99% of CEOs in EMEA have identified "using AI responsibly" as a paramount priority for their respective organizations.
- This excitement in EMEA has resulted in a prolific experimentation phase, with an average of 40 GenAI proofs of concept (PoCs) developed per organization in a very short timeframe. However, less than 13% of those pilots made it to production.
- Moving AI out of the experimentation phase means overcoming strategic and organizational issues that prevent AI initiatives from succeeding.

Average Numbers of GenAI initiatives in EMEA in the Last 12 Months



Future Enterprise Resiliency & Spending Survey Wave 4, IDC, April, 2024 (EMEA N=220)

Leveraging interviews with EMEA CxOs, this ebook focuses on the hurdles leaders face in implementing their AI initiatives and provides guidance on how to move beyond the GenAI Scramble to scaling AI adoption at an organization level.

Executive summary

What will it take for an organization to move from the experimentation phase to scaling GenAI investments? This ebook takes a closer look at the business model transformation aspect, exploring key requirements and action items for organizations, covering strategy, people, governance, and impact.

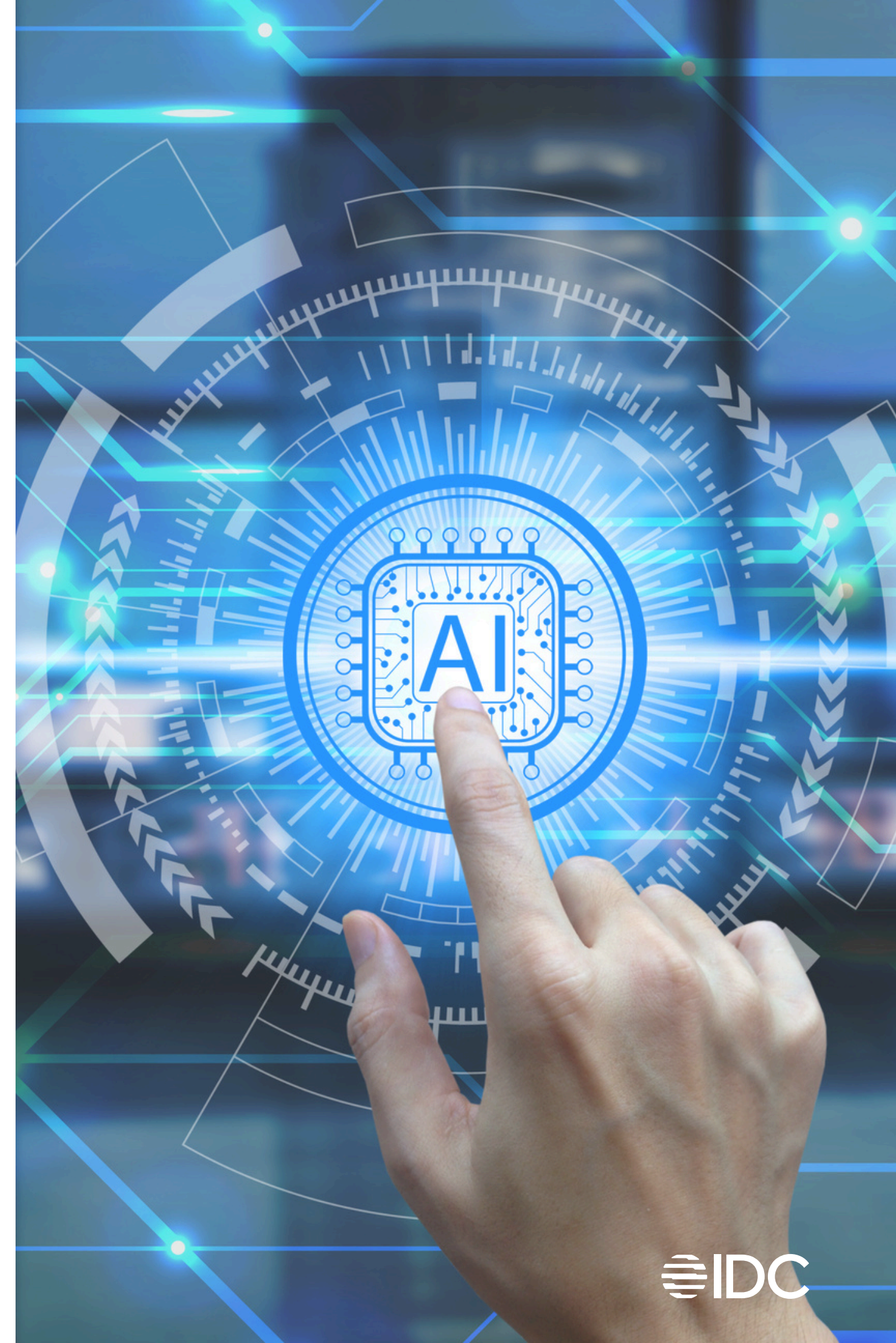


AI-fueled business model:

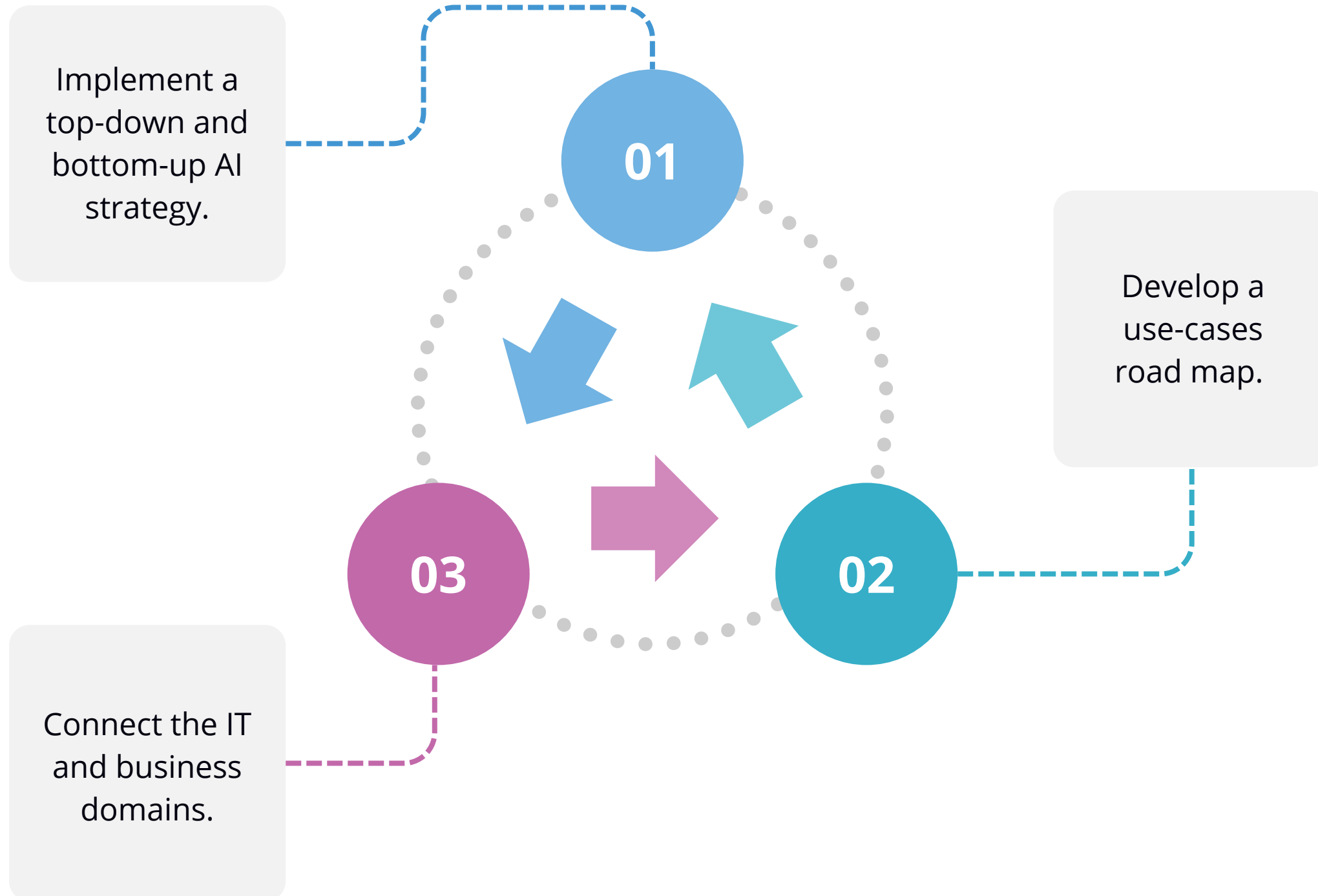
- AI-fueled business strategy
- AI-augmented work
- Unified AI governance model

AI technology operating model:

- Unified AI platform
- Autonomous processes
- AI-ready data
- Fit-for-purpose infrastructure



Develop an AI enterprise-wide strategy



“Mediolanum uses AI almost everywhere. We can say that we use AI in customer care, risk management, and investment strategies. AI is really everywhere.”

— **Demetrio Migliorati, Head of Innovation, Banca Mediolanum**



“The strategy is to take a top-down and bottom-up approach, implement fast, learn fast, and move on.”

— **Michael Carstens, former CIO, WE, Carlsberg**



“We [IT] are business partners, and we are measured on business impact. Every business function is involved, and IT is really a part of the business.”

— **Andrea Roero, Group CIO, Molteni&C**





Who should be the orchestrator?

TECH LEADER COORDINATION



BUSINESS LEADER COORDINATION



FEDERATED C-Suite CENTER OF EXCELLENCE

Orchestrator

AI responsibilities are added to existing tech leaders' roles, or new tech teams or tech leader roles are created.

Benefits

- Unified and consistent tech road map
- Clear understanding of technology operating model challenges (data, infrastructure, apps)

Orchestrator

AI responsibilities are added to existing business leaders' roles — those typically with responsibilities in corporate strategy/governance.

Benefits

- Business agility and innovation
- Promotes specialized knowledge and expertise

Orchestrator

AI responsibilities are shared in a federated C-suite committee, jointly led by business and tech leaders.

Benefits

- Promotes scalability and cross-organization acceptance of the strategic direction
- Leverages expertise across functions
- Strengthens tech and business strategy alignment

Tech leaders in EMEA are most likely to be AI orchestrators

Strategy

“Time is ever pressing. Literally, 18 months back, I would never have imagined that I’d be hiring a chief AI officer.”

— Anindya Biswas, Chief Digital and Product Officer, Mitie



“We have established an AI and innovation team under our data platform leadership team. The team focuses on broad AI, using machine learning, predictive models such as those for supply chain processes, and GenAI. However, generative AI is spread across the business. It’s not something that you can keep centralized in a data and analytics area at the moment. The team provides guidelines on how to use AI responsibly, what you can do, and who to consult for all Pandorans [employees of Pandora] and is currently focused on discovering use cases.”

— Casper Jensen, Engineering Director,
Enterprise Architecture, Pandora



Workers themselves want to be involved in how generative AI will be used at work

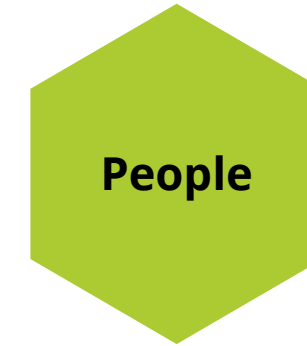


“If you understand that this is a change-management project instead of a technological project, then the focus of your project shifts to people instead of solutions. And when you look at the people and the impact on them — the impact on their roles — and you try to remove their fears, you learn something. At the end, the solution will be extremely customized for your organization.”

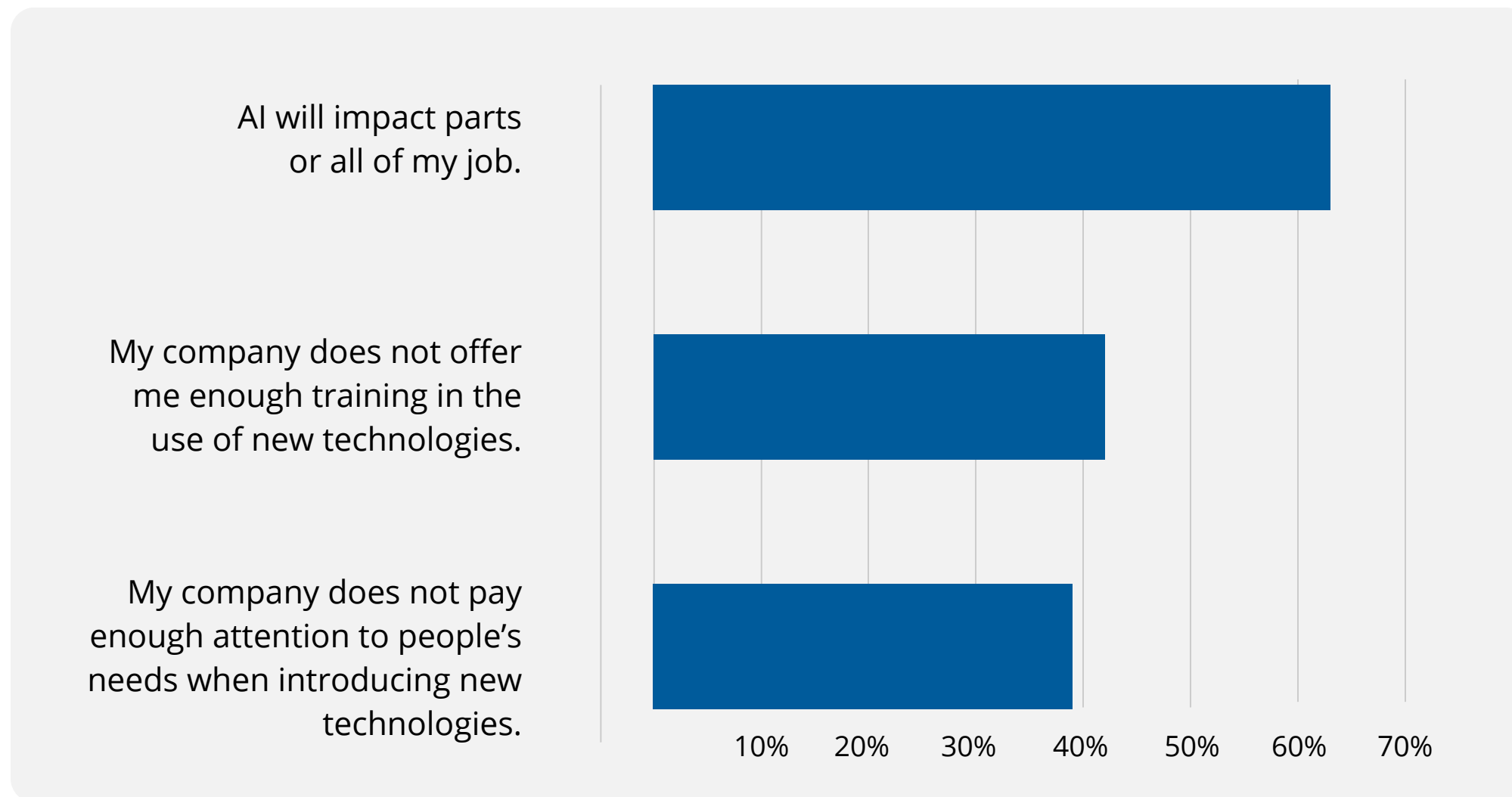
— Demetrio Migliorati, Head of Innovation, Mediolanum Group



Learning and training are critical



% of EMEA employees who agree



IDC, EMEA FoW Employee Experience Survey 2024 (N=4,300)

“The role of HR is going to be critical in this, too, and that’s to facilitate the learning that’s required to enable this disruptive technology to be used successfully.”

— Barry Lowry, CIO,
Government of Ireland



“HR needs to be open minded, and they don’t have to know everything about AI. They must trust technical people to do their jobs.”

— Chiara Pranteda, Data-Driven HR
Specialist, Reale Mutua
Assicurazioni



Develop your governance by design

Governance

“AI governance is strategy,” says Group Vice President Duncan Brown, IDC. “Neither AI governance nor AI strategy is complete without the other. Don’t forget culture: Align internal values and practices with external AI ethics commitments.”

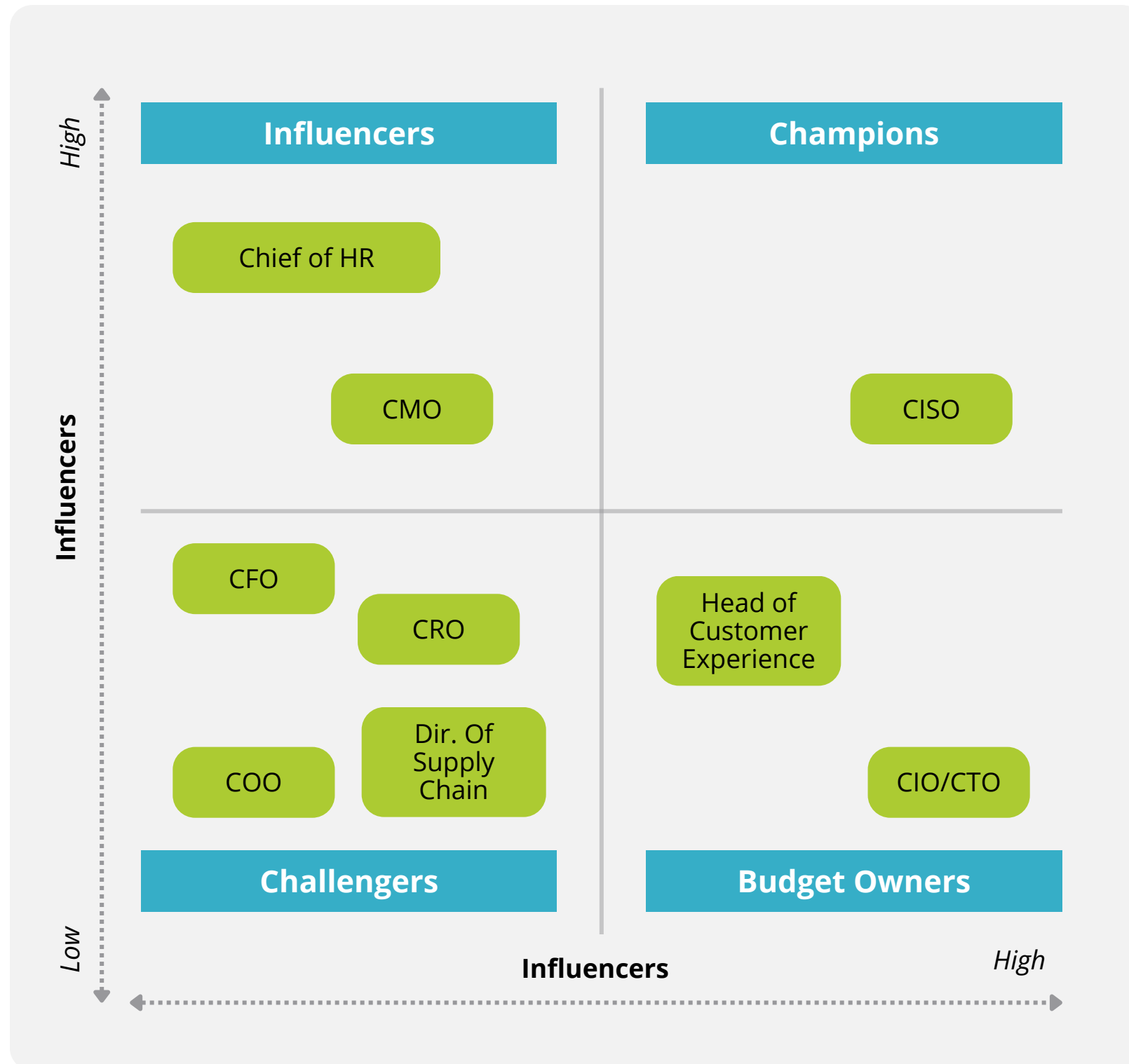


“We developed a governance framework for responsible AI with its own KPIs and an assessment that all new systems have to complete in order to make sure they are implemented ethically and responsibly.”

— Alejandra Diaz, Head of AI, Telefonica



The role of the CISO



“The AI landscape is fast changing, so the CISO, CIO, and business leaders together need to drive AI strategy. We don’t lead AI, but we are deeply involved.”

— Wolfgang Bitomsky, CIO, FCC, an environmental services firm



“AI is such a fast-growing area that it's hard for leaders to keep up — and we shouldn't necessarily expect them to. A key capability of an effective IT leader is understanding high-level concepts and being able to locate and bring in the right people with the right expertise to evaluate technologies, carry out due diligence and research, conduct pilots, etcetera, and really understand the details of how to ensure AI accuracy and trust.”

— **Mark Singleton, Chief Digital & Information Officer,
Blackpool Teaching Hospitals NHS Foundation Trust**



Your road map to becoming an AI-fueled digital business

**Don't regard AI as an IT tool.
It's a business reimagination.**



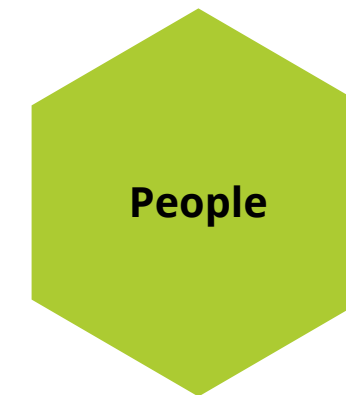
- Develop an enterprise-wide AI strategy, setting goals for the entire organization.
- Set up a dedicated AI leader/team to orchestrate the implementation of use cases.
- Start small, experimenting with a few use cases, and quantify the business impact as you progress.

**Focus on governance and the
responsible use of tech.**



- Establish a dedicated team to build a governance-by-design program, and make sure the CISO is involved.
- Take a high-security approach, ensuring high-quality data, strictly controlling sensitive data, understanding what data has intellectual property ownership issues, and tracking internal data use with external GenAI models.

**Don't underestimate the importance
of change management. Humans
should be at the center.**



- Communicate to employees a vision of AI that fits in with the overall business strategy and with their day-to-day jobs.
- Develop a change-management program, and make sure the CHRO is involved in developing the AI strategy from the start.

Additional resources

- Practices for Successfully Coordinating AI Initiatives, the AI Orchestrator — an EMEA Leaders in the Age of AI Everywhere Study – Oct 2024
- IDCPeerScope: Practices for Successfully Building AI-Fueled Business Strategies — an EMEA Leaders in the Age of AI Everywhere Study – Oct 2024
- IDCPeerScope: Practices for Successfully Implementing AI Governance — an EMEA Leaders in the Age of AI Everywhere Study – Oct 2024
- Practices for Successfully Implementing AI, the Role of Employees — an EMEA Leaders in the Age of AI Everywhere Study – Sept 2024



European Headquarters

5th floor Ealing Cross, 85 Uxbridge Road, London W5 5TH, United Kingdom

Malé nám. 459/11, 110 00 Prague, Czech Republic



Register now for IDC's EMEA
FutureScape - Predictions for 2025
and beyond

[Register](#)