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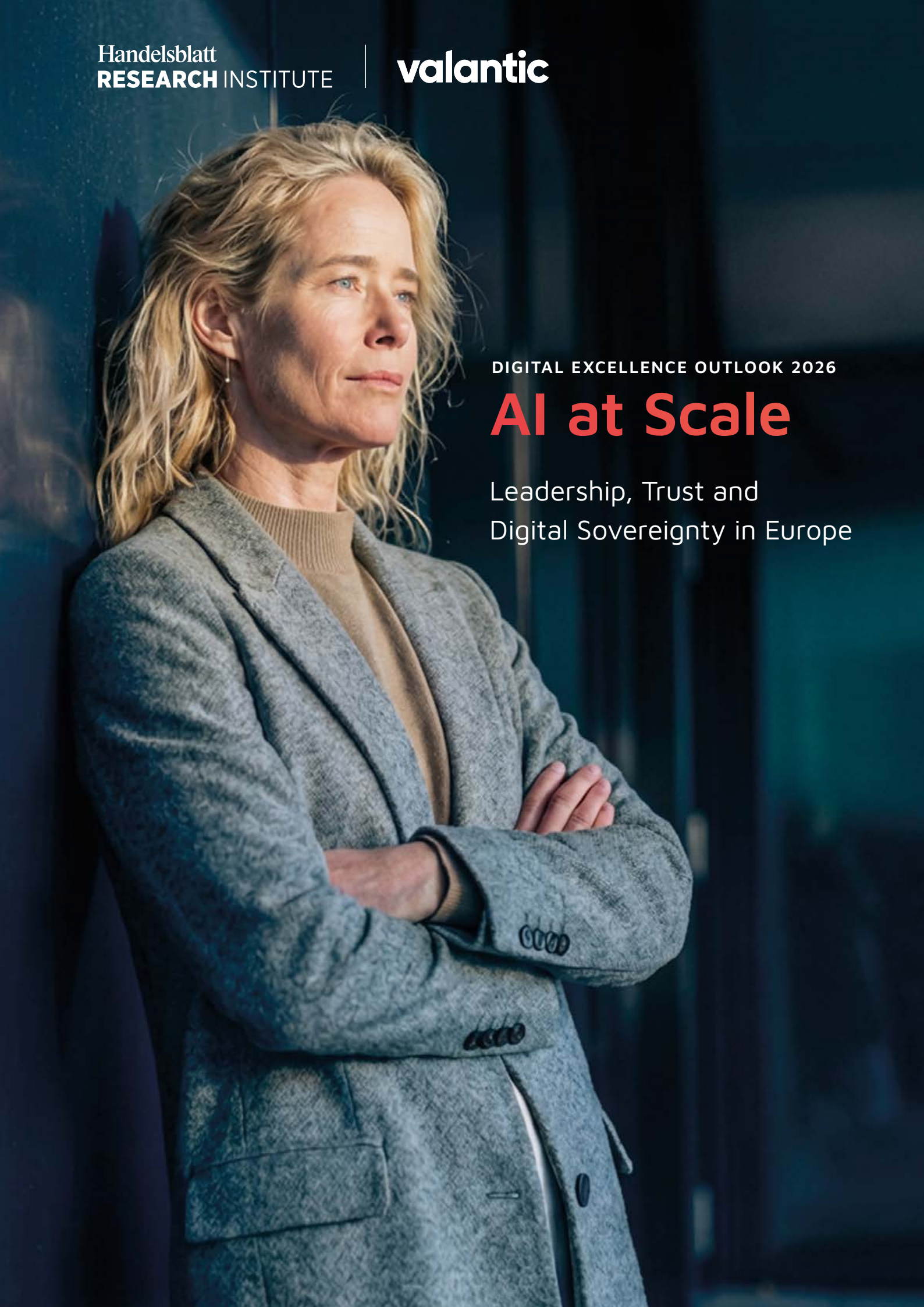

DIGITAL EXCELLENCE OUTLOOK 2026

AI at Scale

Leadership, Trust and Digital Sovereignty in Europe

Contents

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EDITORIAL

The path to AI maturity: opportunities and challenges

How can companies specifically advance their AI maturity? What structures and skills are crucial for successfully exploiting the potential of AI? And how can we strike a balance between technological innovation and responsible action?

In addition to these key questions, this study report also addresses the central challenge of digital sovereignty: How can companies reduce their dependence on external technology providers? What steps are necessary to ensure data sovereignty while remaining globally competitive?

The study also addresses one of the most exciting dimensions of digital transformation: the collaboration between humans and AI bots. How can managers ensure that humans and machines complement each other optimally and work together effectively as a team? This requires not only new roles and skills, but also a deep understanding of how AI is changing the world of work and how these changes can be actively managed.

Our answers to these questions are based on the valuable insights from over 1.000 decision-makers who shared their experiences and perspectives in interviews. Their input was crucial to the depth and quality of this study report and impressively demonstrates how companies from a wide range of industries are actively shaping digital transformation.

The findings of this study report are intended to provide you with guidance and inspiration for your own next steps. Use the perspectives presented here to make your organization fit for the future and actively shape the possibilities of AI.

We would like to express our sincere thanks to all participants who have enriched this study report with their expertise. Your contribution is essential for a well-founded discussion of the challenges and opportunities of AI.

We hope this report offers valuable guidance and supports you on your journey toward AI maturity.

Laurenz Kirchner (valantic) and
Dr. Sven Jung (Handelsblatt Research Institute)

Executive Summary

AI is the most important technology for business success in the next five years

At 86 percent, the vast majority of 1.000 decision-makers surveyed by consider AI to be important for corporate success by 2030. Compared to the results from a year ago, the technology is now clearly in the lead.

According to their own assesment, one-third of companies today have a high level of AI maturity

A high level of AI maturity is essential for the use of AI to generate added value. This is characterized by a strategic understanding of the technology and ensuring that the necessary skills are in place.

AI generates measu-rable added value – in many ways

Almost all companies generate added value in various dimensions. AI is therefore a technology that offers companies a wide range of potential benefits. Workflows and processes become both cheaper and faster, while also delivering better results.

Data isn’t everything, but without data, is nothing

A quality-assured and trustworthy data basis is very important for success in the use of AI. However, success also rests on other pillars, such as enabling employees to work with AI. Companies with a high level of AI maturity are aware of this. In contrast, companies that currently have a low level of AI maturity are very strongly focused on data as a success factor.

Without AI in core processes, many companies risk losing their competitiveness by 2030

In addition to the added value, AI has a much more existential significance for companies. Almost four-fifths of respondents expect that companies will no longer be competitive by 2030 if they do not integrate AI into their core proces-ses and business model.

Leadership and work are undergoing fundamental changes due to the increasing use of AI

The role of managers is shifting from that of operational decision-makers to that of reviewers of intelligent systems, who classify, evaluate and ultimately bear responsibility. At the same time, companies must actively work to maintain key skills (e.g., problem-solving skills, critical thinking) among their workforce.

Human skills such as creativity, empathy and ethical judgment are becoming increasingly important

In the future, intelligent applications are likely to take on more analytical and operational tasks. The majority of decision-makers are convinced that creativity, empathy and ethical judgment will play a central role for employees in the future. Companies should promote these skills more strongly.

Digital sovereignty is an important aspect of AI deployment – leading companies have recognized this and are acting accordingly

The use of AI can create dependencies for companies that harbor potential risks. Companies with a high degree of AI maturity are particularly aware of this and are taking steps to counteract it: Nine out of ten companies have already taken measures to strengthen their digital sovereignty.

From pilot projects toproductive use: Those who hesitate now will be left behind

INTRODUCTION

From pilot projects to productive use: Those who hesitate now will be left behind

Artificial intelligence has been a key topic across the entire business landscape for several years now. The more intensively companies engage with this technology, the more its importance grows.

This debate is constantly evolving, accompanied by continuous technological advances. Following a phase of intensive testing and initial pilot projects, companies are now increasingly putting AI to productive use and gaining new experience with the technology. This experience can be used as a learning resource for others. The analysis focuses on use cases, added value, success factors and the AI maturity levels of companies.

Fundamentally, AI is a technology whose effects are not only being felt today, but will continue to be felt far into the future. This year's study therefore focuses on the question of what influence AI will have on the future competitiveness of companies and overall economic growth. It also examines the new demands that AI places on employees and managers.

However, AI is not the only digital topic currently at the top of companies' agendas. That is why digital sovereignty is another aspect of the analysis. Recently, the topic has become increasingly relevant in view of changes in the geopolitical framework. Especially when a new technology is implemented, ensuring sovereignty may play an even less important role. However, dependencies can quickly arise when using AI applications, which may be critical under certain circumstances.

With the various findings in this study report, companies can leverage their resources to achieve the best possible added value.

The results of our study are based on a quantitative and qualitative survey. In quantitative terms, 1.000 decision-makers from companies in Germany, Austria and Switzerland (DACH region) with more than 100 employees were surveyed, with one-third having more than 1.000 employees. Approximately 11 percent of the companies surveyed even have more than 5.000 employees. The survey was conducted in November 2025 in collaboration with the market research institute techconsult.

The respondents are primarily C-level decision-makers. The focus is on the automotive, pharmaceutical, retail, manufacturing, telecommunications, logistics and utilities (electricity, gas and water) sectors.

The survey consisted of three parts:

- First, we looked at various aspects – use cases, added value, success factors – of AI deployment.
- This was followed by questions about the future impact of technology on competitiveness and skills requirements, as well as the role of responsible AI and regulation.
- The topic of digital sovereignty concluded the event.

These survey results are supplemented and expanded upon qualitatively by eight interviews with experts from companies in various industries.

Like the surveys, this studyreport consists of three parts. The first part deals with current aspects of AI. It focuses on questions such as the importance attached to the technology, the most important use cases, the extent to which added value is generated and what makes its use successful.

The second part of this study examines the future effects of the technology. It investigates the role of AI in maintaining the competitiveness of companies and as a driver of growth. This section also covers the requirements for employees and managers associated with the use of AI in the future. In addition, it discusses the importance of governance, the ethical use of AI and AI regulation.

Part three concludes with a focus on digital sovereignty. Current dependencies and possible measures to strengthen sovereignty are outlined.

A year ago, the report "DIGITAL2030 – The Rise of Applied AI" was published, focusing on AI and the productive use of intelligent applications. Comparing the results of both studies provides further insights.

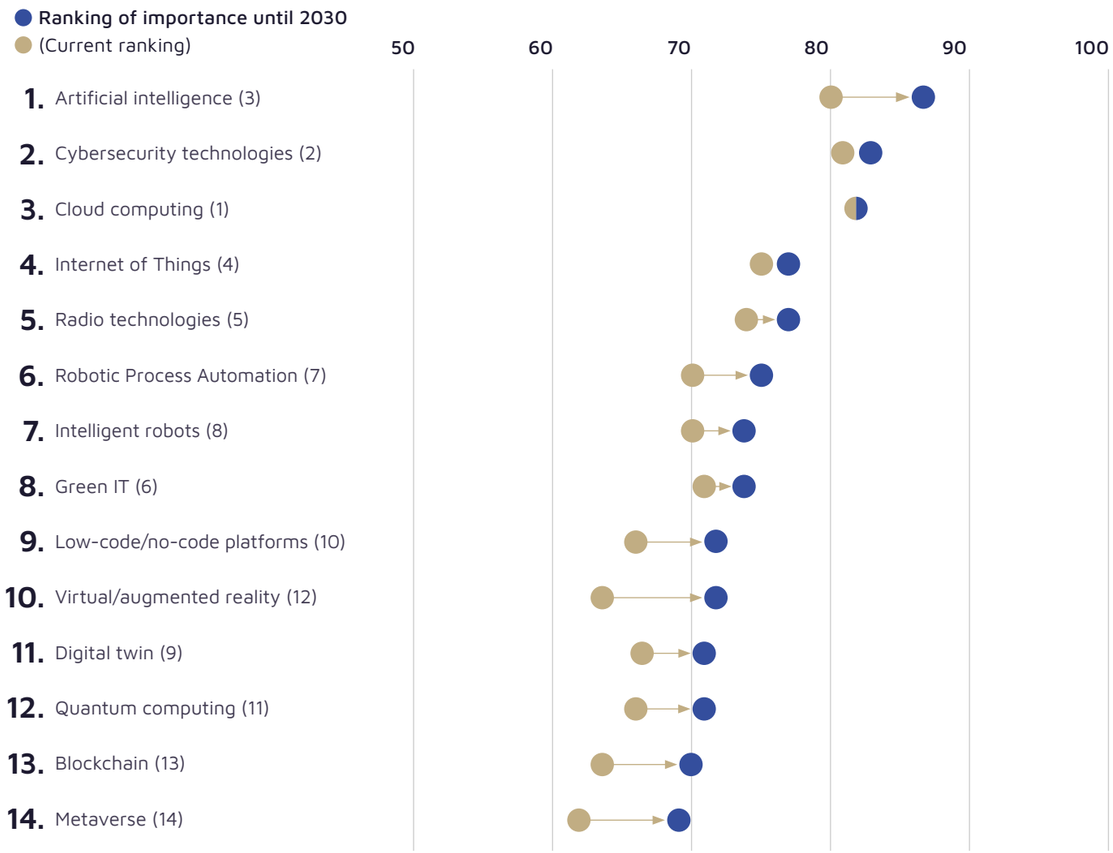
www.valantic.com/ai-at-scale

CHAPTER 1

Technologies critical to success – currently and until 2030

FIGURE 1

AI WILL BECOME THE MOST IMPORTANT TECHNOLOGY FOR BUSINESS SUCCESS BY 2030*



* Percentage of surveyed corporate decision-makers who consider the respective technology to be "rather important" or "very important" for the success of their company, either currently or in the next five years.
Source: Handelsblatt Research Institute/valantic (2026)

Technologies critical to success –currently and until 2030

I don't believe that companies will be able to remain competitive in the future without using AI. The technology is absolutely central and will manifest itself everywhere in companies. No one will be able to escape it.

Gunnar Weider,
SVP Enterprise Architecture, Evonik Industries AG

In the corporate world, AI remains the most discussed and dominant technology. However, when looking at its current significance for corporate success, this dominance is not reflected in the statements of the decision-makers surveyed (see Figure 1). AI is not the only technology that plays a major role in the success of today's companies. Cybersecurity technologies and cloud computing are also crucial. With 82 percent of respondents currently considering the cloud to be important for the success of their companies, it is clearly a key issue.

It is also interesting to take a look at the technologies that very few decision-makers consider relevant to success. These are virtual and augmented reality, blockchain and the metaverse. But even though these technologies are at the bottom of the importance ranking, blockchain and the metaverse, for example, are still considered important for current business success by slightly more than three-fifths of those surveyed. In this respect, potential continues to be seen in these technologies. Although there have been two major attempts in recent years to establish the metaverse in the market (Second Life, developments surrounding the renaming of Facebook to Meta Platforms), these have so far been unsuccessful. There is still a lack of value-adding use cases. The same applies to blockchain.

When asked about the significance for corporate success over the next five years – i.e., until 2030 – blockchain and the metaverse still rank at the bottom of the list, but now slightly more respondents (more than two-thirds) consider these two technologies to be important for success. Blockchain and the metaverse may therefore play a role in the future.

However, the top technologies are more decisive. And here, AI ranks first. 86 percent of those surveyed believe that AI will be crucial to the future success of their companies. AI is therefore the top trend technology for 2026. In last year's analysis, the technology only ranked third in terms of importance. This was attributed to lingering uncertainties. Companies now seem to have a clearer view of the potential of AI and clearly regard it as critical to success.

Cybersecurity technologies and cloud computing round out the top three. Furthermore, cyberattacks continue to pose a major threat and cybersecurity therefore plays an important role in securing the existence of companies. Cloud computing is the basis for many other digital technologies.

Furthermore, it is evident that, with the exception of cloud computing, all technologies are rated by more respondents as important for future success than for current success. In the ranking, however, there are only minor shifts. The most striking improvement is in AI and virtual and augmented reality, which moved up two places and a similar decline in green IT.

It is important for our employees to understand that AI is not a threat to them but actually makes their work easier. They work better together, using digital tools.

Nicole Blohm,

VP Portfolio Strategy & Product Management, Ricoh USA

Our training courses explain the background and rules for using AI, as well as the corresponding applications. We encourage its use and offer opportunities to exchange experiences.

Dr. Kerstin Borgards,

Global Head of Strategy Realization and Process Improvements – Pharma Clinical Manufacturing Network, Roche

There are differences in assessment across the various industries. Although AI is one of the three most important technologies for future business success in all industries, it is not always considered the most decisive. This is currently the case in the automotive, logistics and manufacturing industries, where most respondents consider AI to be important for future business success.

The assessment is different in the pharmaceutical sector, where green IT ranks first. Respondents from retail and telecommunications companies, on the other hand, most frequently cite cybersecurity technologies as important for future success. Apart from pharmaceutical companies, this technology is also among the top three in all other industries.

In the utilities sector, on the other hand, cybersecurity technologies and AI are only the second most frequently mentioned technologies. Cloud computing is considered the most important technology for future business success in this industry.

However, it is clear that the current and future success of almost all companies depends primarily on three technologies: AI, cybersecurity and cloud computing. Compared to last year's survey, this year's survey highlights that AI is now the most crucial technology for the business success of tomorrow.

It is essential that company management, employees and society at large recognize that the use of AI is very helpful. This will cause the trust curve to continue rising until AI decisions are accepted.

Nico Michels,

Head of Digital Enterprise, Siemens Digital Industries Software

CHAPTER 2

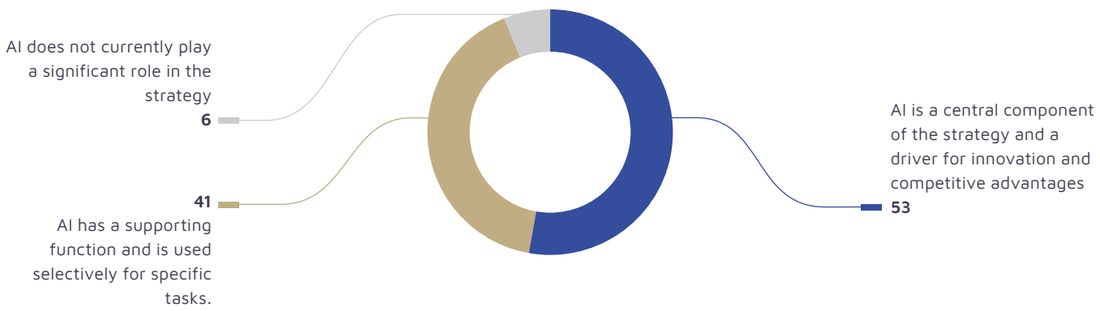
AI maturity level – a good third of companies can already use AI with potential for success

The use of AI involves more than just implementing technology and applications. AI is not a simple software program that companies can install and use overnight. Rather, there is a strategic dimension to the technology and its implementation, as will be shown by the success factors. Proper preparation is important in order to generate as much added value as possible with artificial intelligence.

The many facets of AI necessitate a strategic approach. Against this backdrop, it is encouraging that around half of respondents state that AI is a central component of their company's strategy (see Figure 2). This demonstrates an appropriate awareness of the extensive requirements involved in deploying AI.

FIGURE 2

Only half of companies have already incorporated AI into their corporate strategy*

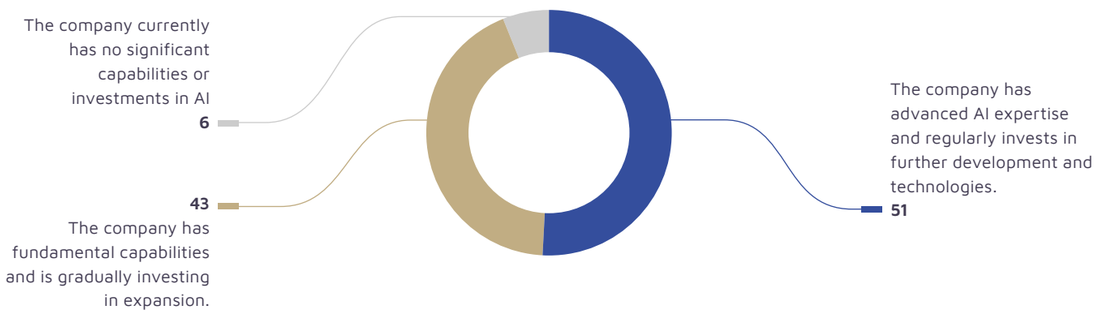


* Question: "What role does AI play in your corporate strategy?" Percentage of corporate decision-makers surveyed.
Source: Handelsblatt Research Institute/valantic (2026)

AI maturity level – a good third of companies can already use AI with potential for success

FIGURE 3

AI capabilities still have room for improvement at many companies*



* Question: "How would you rate your organizational and technical skills in the field of AI?" Percentage of corporate decision-makers surveyed.
Source: Handelsblatt Research Institute/valantic (2026)

At the same time, however, the result also means that almost 50 percent of companies are not yet where they ideally should be. After all, only six percent of decision-makers say that AI does not play a significant role in their strategy.

In order for companies to use AI profitably, they need the necessary skills in their workforce. Employees must therefore be empowered to use and collaborate with intelligent applications. This is one facet of the strategic dimension.

When it comes to skills, the current picture is similar to that of strategy. According to the decision-makers surveyed, a good half of companies have advanced AI skills and invest regularly in further development (see Figure 3). However, many companies still need to focus on further skills development, although most are already well on their way. Only six percent of respondents have no significant skills.

The strategic understanding of AI and existing capabilities form the essential basis for the effective use of technology that generates added value. This represents a certain basic capability of companies, which is referred to below as AI maturity. The degree of maturity indicates the extent to which companies are already able to effectively design the use of AI and thus get the most out of it.

There are three levels of maturity (see Figure 4). Companies with a high level of AI maturity have firmly anchored the topic in their strategy and possess advanced skills. For the medium level of maturity, at least basic skills must be in place and AI must not be completely left out of the strategy. If the latter is the case or if there are no significant skills, the AI maturity level is low. Since both dimensions are crucial, a deficiency in one dimension cannot be compensated for by progress in the other. In this respect, the lowest score in one of the dimensions determines the AI maturity level.

FIGURE 4

Only a few companies are still completely immature when it comes to AI*

* Percentage of surveyed corporate decision-makers who gave the corresponding answers to the two questions "What role does AI play in your corporate strategy?" and "How would you rate your organizational and technical capabilities in the field of AI?"; derivation of AI maturity (high, medium, low).
Source: Handelsblatt Research Institute/valantic (2026)

This approach paints the following picture: slightly more than a third of companies are already well positioned to successfully deploy intelligent applications and generate added value thanks to their high level of maturity. Another 55 percent are on their way there with a medium level of maturity. All that is needed here is a little further development. However, another nine percent still have some way to go. These companies currently lack a strategic view of AI and/or the necessary skills.

Looking at the various industries, it is clear that automotive, telecommunications and retail have the highest level of AI maturity (see Figure 5). Almost half of the companies in these industries are already able to use AI successfully. The situation is different in manufacturing and logistics, however, where three-fifths of companies have only reached a medium level of maturity.

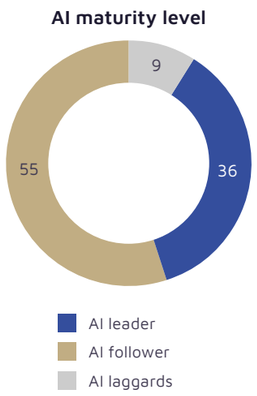
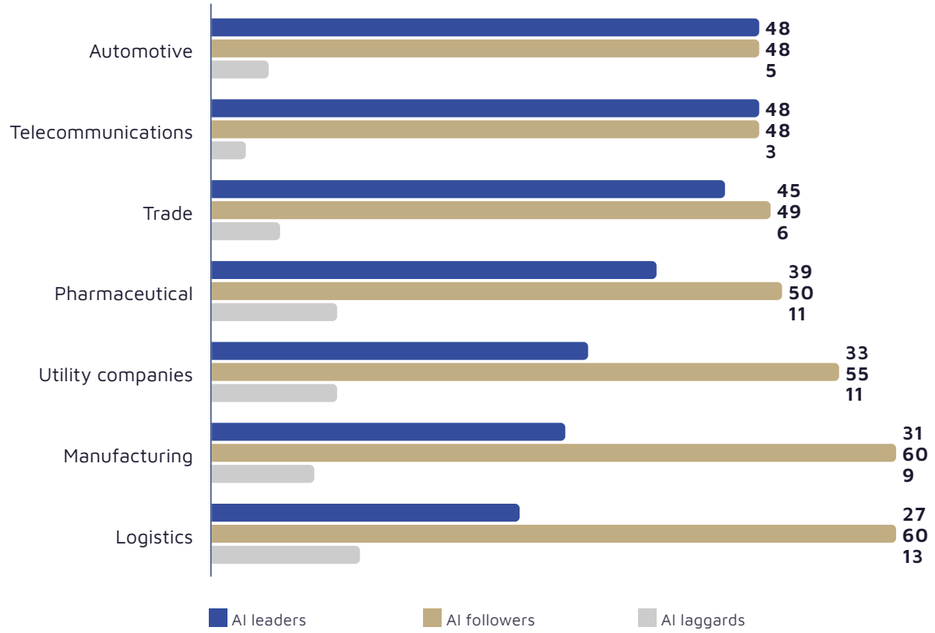


FIGURE 5

The automotive and telecommunications industries are leading the way in AI maturity*.



* Percentage shares for the classification of companies into the three AI maturity levels based on the responses of the surveyed company decision-makers in the respective industry; differences from 100 percent are due in part to rounding.
Source: Handelsblatt Research Institute/valantic (2026)

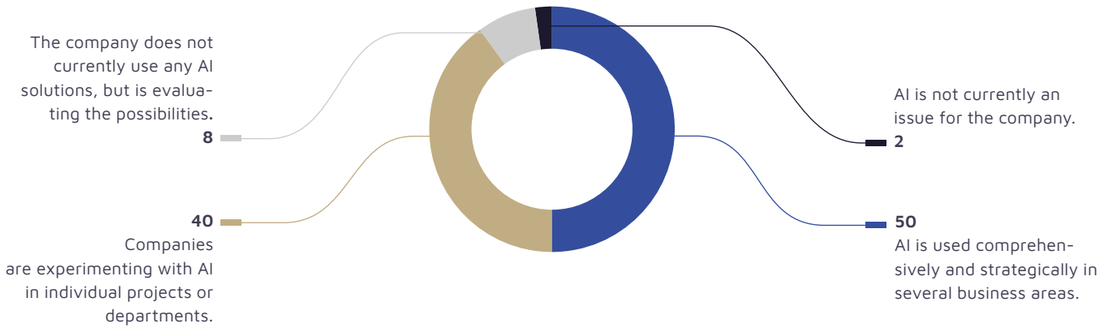
In addition, there is a close correlation between AI maturity and the current use of AI in companies. Following the release of ChatGPT – based on GPT-3.5 – a real hype surrounding AI developed from December 2022 onwards. As a result, many companies began to try out AI tools and test potential applications. Initial pilot projects were initiated. Meanwhile, companies – especially those with a high maturity level – are in the process of implementing intelligent applications company-wide, thereby scaling their use.

This is reflected in the statements made by respondents (see Figure 6). Half of the decision-makers state that AI is used extensively in their companies. For another 40 percent, this is likely to be the case in the medium term. They are already using intelligent applications in individual projects or departments. With the experience they have gained, they are likely to roll out AI further soon. In this respect, the majority of companies will soon be using AI extensively, strategically and company-wide.

In terms of AI maturity, it can be observed that more mature companies are further advanced in their use of the technology. If AI is an integral part of the strategy and advanced skills are available, companies are more likely to use the technology comprehensively.

FIGURE 6

Half of companies are already making extensive use of AI*



* Question: "To what extent do you currently use AI technologies in your company?" Percentage of corporate decision-makers surveyed.
Source: Handelsblatt Research Institute/valantic (2026)

Many companies still have to go through a valley of tears. Although they have set up projects in various fields of application, they are now confronted with a lack of expertise within their companies, the quality of company data is often insufficient, the amortization of AI investments takes more time and the added value is not immediately apparent.

Dr. Bettina Uhlich,
Chair of the Executive Committee, VOICE – Federal Association of IT Users

CHAPTER 3

The use of AI leads to added value for in several dimensions

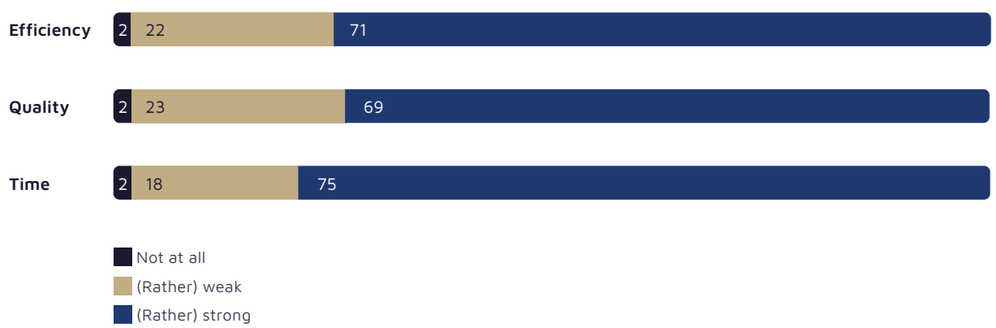
Of course, companies do not implement AI as an end in itself, but rather want to achieve added value through the use of intelligent applications. And this is indeed the case. Only six percent of decision-makers state that their companies have not yet realized any added value through the use of AI (see Figure 7). In this respect, AI is a value-adding technology for almost all companies.

In doing so, 94 percent of companies achieve added value in various dimensions. AI is therefore a technology that offers companies a wide range of potential. Here, added value is initially most evident in the time dimension. Three-quarters of respondents say they are experiencing faster processes. At the same time, around 70 percent of decision-makers say that the added value is also strongly evident in the dimensions of efficiency and quality.

AI enables companies to make their workflows and processes both cheaper and faster, while also delivering better results. This is precisely what makes the technology so important for the economy.

FIGURE 7

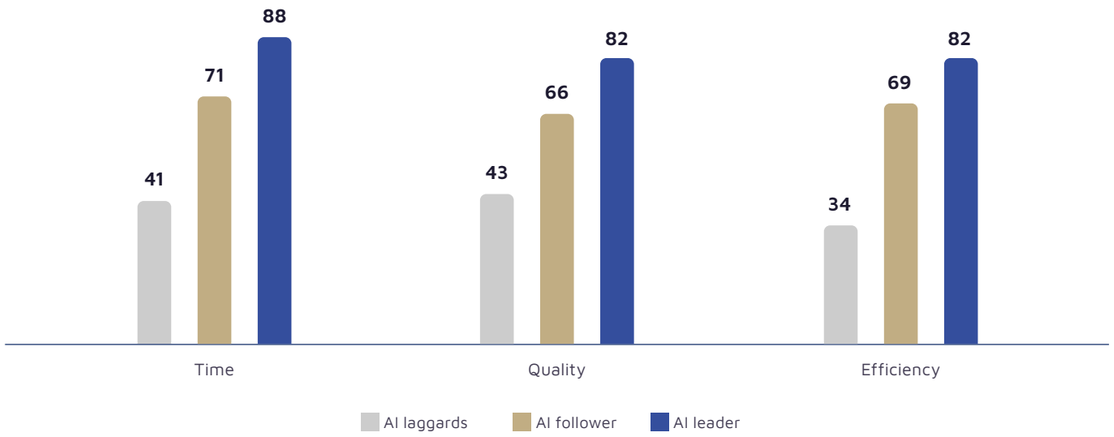
AI enables added value in all dimensions*



* Question: "How significant is the added value of applied AI in processes across all use cases in the following areas?"; percentage of corporate decision-makers surveyed; difference from 100 percent: "No added value realized yet".
Source: Handelsblatt Research Institute/valantic (2026)

FIGURE 8

AI leaders are most likely to realize added value*



* Question: "How strong is the added value of applied AI in processes across all use cases in the following areas?" Percentage of corporate decision-makers surveyed according to AI maturity level who answered" rather strong" or" very strong".
Source: Handelsblatt Research Institute/valantic (2026)

Companies do not achieve these added values through the mere use of AI alone. Rather, they benefit from deploying intelligent applications where these use cases are meaningful and beneficial. There are also other relevant success factors. These factors and possible use cases will be discussed in the next two chapters.

However, the degree of AI maturity also plays a role in achieving added value. Accordingly, decision-makers from companies with a higher level of AI maturity more frequently report added value across all three dimensions (see Figure 8). For this reason, companies should also keep an eye on their degree of maturity in order to be successful with AI. The right strategic approach to the technology and the promotion of the necessary skills are key to achieving added value quickly.

There are also differences between industries when it comes to the extent to which the use of AI is already paying off. Compared to other industries, relatively few decision-makers in the pharmaceutical and telecommunications sectors report no added value. These two industries are clearly ahead in terms of achieving added value.

The situation is different for automotive and retail companies, whose respondents indicate slightly more frequently than in other industries that no added value has been achieved yet. However, the reason for these differences does not lie in industry-specific AI maturity, as the differences in this area do not correspond to those in added value. Rather, these differences are likely to be due to other characteristics that vary in intensity across industries.

For example, this could be the complexity of the products and the underlying manufacturing processes, as well as the use cases that are suitable for them. The extent to which companies in a particular industry are already achieving added value with AI is also influenced by factors such as the regulatory framework, data availability and quality and the competitive situation, which may create pressure to innovate.

CHAPTER 4

Numerous Use Case cluster s are relevant for the use of AI

There are numerous fields of application and clusters of Use Cases for the use of AI in companies. None of the Use Case clusters considered (see box "Outline of the various Use Case cluster s" on p. 20) is considered irrelevant by the majority of the corporate decision-makers surveyed (see Figure 9). More than 80 percent consider them relevant. According to 92 percent of respondents, the most important of these is the automated extraction, processing and management of large amounts of information from documents and data sets in high quality.

The three most relevant Use Case clusters also include the creation of media content and the automation of customer service. Although still at a high level, supply chain optimization, personalized marketing, robotics and smart products are considered relevant Use Case clusters by very few.

A year ago, the corporate decision-makers surveyed gave a slightly different assessment of relevance. This resulted in a different ranking of Use Case cluster s. For example, in 2025, the creation of media content was considered important by very few respondents at the time. This Use Case is now seen as significantly more relevant in relation to the other clusters. The situation is different, however, for quality control, robotics and smart products. In last year's study, these were still ranked first and third. Now, their relevance is considered significantly weaker compared to the other Use Case cluster s.

The comparison over time shows that the significance of Use Case clusters is changing as technology advances and companies gain experience. For companies, this means that they need to continuously and actively examine and review Use Case cluster s.

Document and data management is not only the Use Case cluster that most respondents consider relevant, but also the one currently most widespread in companies. AI is used in this area in approximately three-fifths of companies. The use of intelligent applications for quality control and fraud detection and prevention is also widespread. Document and data management as well as quality control had already been identified as the most important Use Case clusters by most respondents in last year's analysis.

In contrast, AI is only used in robotics and smart products by around 48 percent of respondents. This makes it the Use Case cluster with the lowest prevalence. Intelligent robots in particular represent a technologically very elaborate AI application, meaning that widespread use simply needs a little more progress and is therefore a matter of time. Furthermore, this Use Case cluster is only relevant for some of the companies.

The situation is different when it comes to document and data management. Every company can use AI for this application, which explains its current widespread use. In addition, this Use Case cluster is currently most often associated with added value. Almost 30 percent of respondents say that their companies are already achieving measurable added value through the use of AI in document and data management. The top three Use Case clusters for this question also include fraud detection and prevention, as well as financial planning and risk management.

Overall, document and data management ranks highest in all three dimensions considered – relevance, dissemination and added value. It is therefore currently the most important Use Case cluster and a promising starting point for companies wishing to implement AI.

Outline of the various Use Case cluster s

Automation in customer service

Chatbots and virtual assistants for handling customer inquiries and providing support

Fraud detection and prevention

For example, analysis of transaction patterns, anomaly detection and real-time identification of potentially fraudulent activities

Document and data management

Automatically extract, process and manage large amounts of information from documents and data sets with high quality

Financial planning & risk management

Predicting, planning and performing essential and complex analyses, identifying and managing financial risks to improve profitability and reduce risk

Create media content

Creating creative content (images, text, audio, video) for publication in media such as print media, websites and social media

Supply chain optimization

For example, accurate demand forecasting, optimization of delivery routes, reduction of inventory, optimized manufacturing and logistics planning.

Personalized marketing

Individually tailored marketing messages and product suggestions based on the analysis of customer data and behavior

Human resources management

Automation of administrative tasks and optimization of measures throughout the entire HR lifecycle

Predictive maintenance, asset management and maintenance

Wear prediction and support for maintenance and management of, for example, machines, components or vehicles

Price optimization in purchasing and sales

For example, optimizing purchase prices and negotiating positions based on market data, supplier performance and historical cost data or dynamic pricing in sales, taking into account demand, inventory levels, customer behavior and competitor prices.

Product and application development

AI-supported definition of requirements and product specifications, as well as automation of technical design and software development

Quality control

Identify defects and ensure product quality through visual or other sensory inspections

Robotics & Smart Products

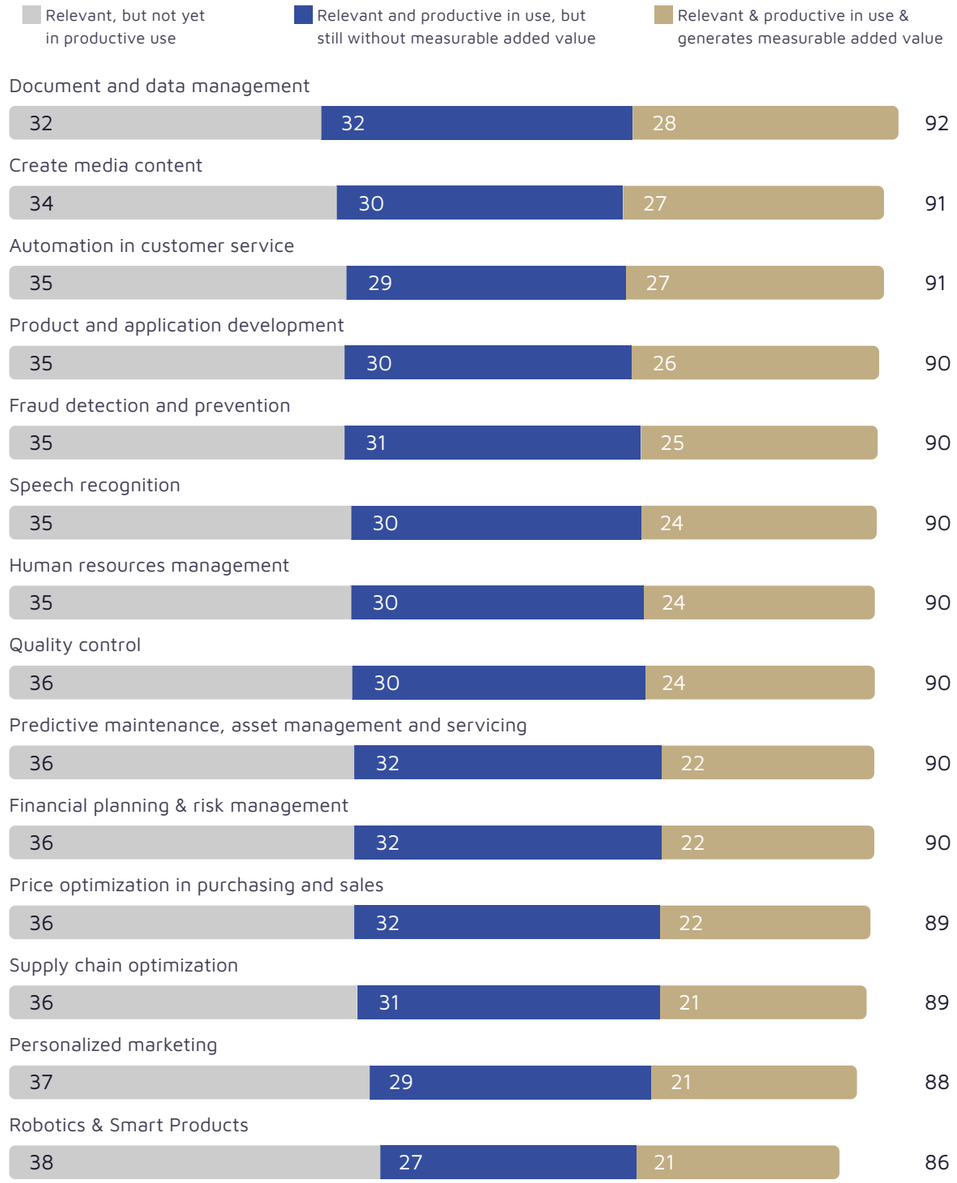
Automation of product functions; Interaction of sensor technology, control systems and logic for autonomous functioning and Optimization of hardware products

Speech recognition and control

Understanding and processing of naturally spoken language for business processes

FIGURE 9

Data and document management is currently the most important Use Case cluster *



* Question: "How relevant are the following AI-Use cases currently for your company and at what stage are they in terms of implementation?"; percentage share of the company decision-makers surveyed in each case. Figure on the far right: total share of respondents who consider the respective Use Case cluster to be "relevant".
Source: Handelsblatt Research Institute/valantic (2026)

Although the creation of media content is considered the second most relevant, companies use such use cases much less frequently than other clusters and therefore currently generate less added value. It is possible that the high relevance will only lead to more widespread and value-adding use in the future.

This applies even more to robotics and smart products. These may be very elaborate use cases and it will take some time before AI is used in this context in many companies. At present, the technology is probably not yet ready for commercial application. That is why this Use Case cluster ranks last in all three dimensions.

However, the extent to which the various clusters are relevant for companies is not just a question of time. Reason in addition, it is apparent that the Use Case clusters are not equally applicable to all companies. The degree of AI maturity also plays a role here.

Document and data management is clearly the top priority for companies with low or medium maturity levels in terms of releasevanz, distribution and added value. However, the situation is different for companies with a high level of AI maturity. Here, product and application development is at the forefront across all three dimensionsze.

This cluster represents significantly more complex and far-reaching use cases that involve not only internal processes, but also products and applications – in other words, the core of the companies.

However, only those companies that already have more experience with AI and are better equipped for its use are likely to focus on this. At the outset, less mature companies are initially placing greater emphasis on intelligent applications for document and data management.

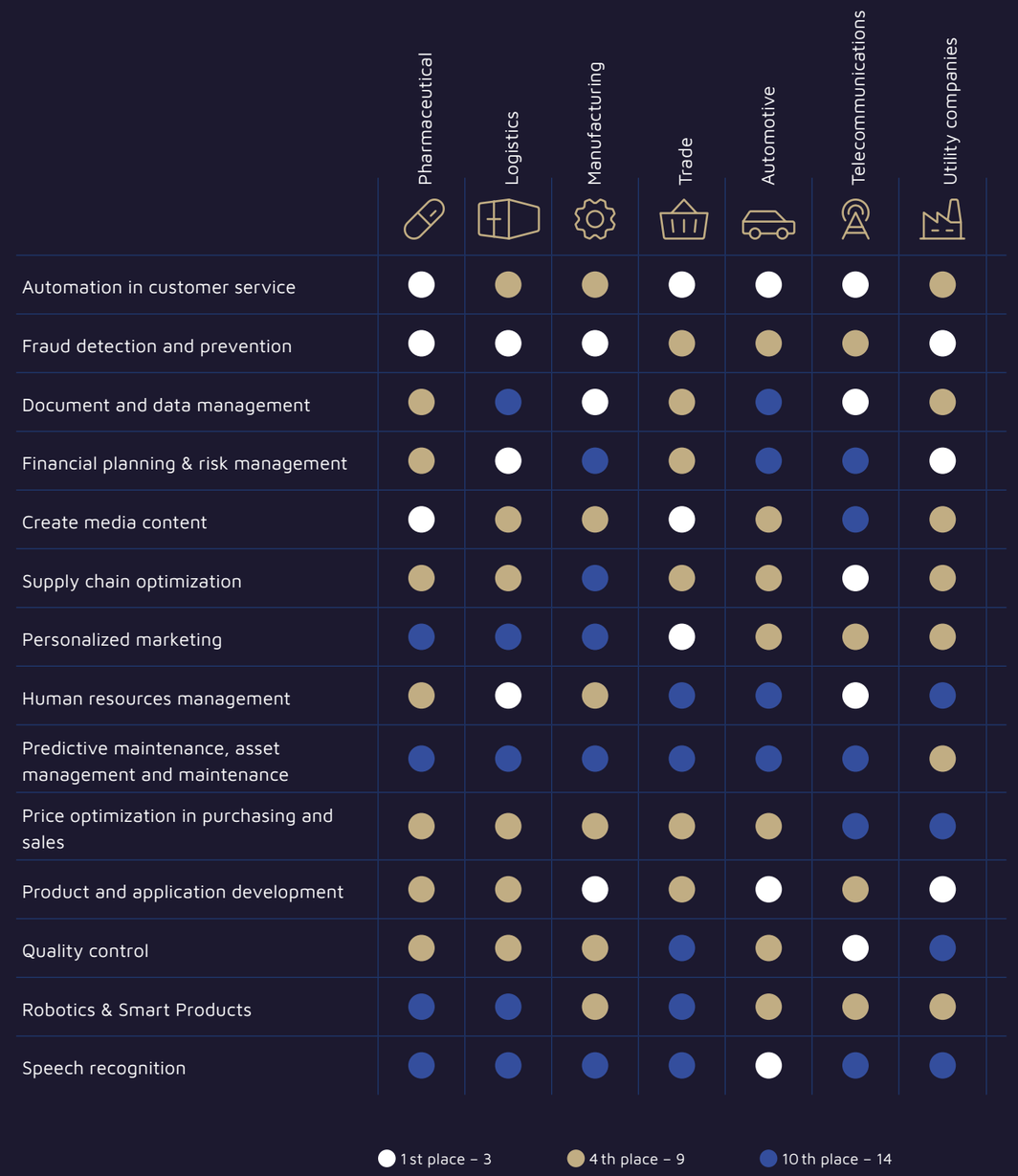
Further variations in the relevance and frequency of use of use cases can be seen between industries (see Figure 10). In some cases, the most frequently used Use Case clusters can be explained by the specific industry. For example, intelligent product and application development plays a greater role in the automotive and manufacturing sectors. And, appropriately, retail companies more frequently rely on personalized marketing, automated customer service and the creation of media content – all supported by AI. In the telecommunications industry, on the other hand, there is a greater focus on AI applications for quality control, document and data management and automation in customer service, among other things. In this respect, as in last year's study report, the industry plays a major role in identifying suitable Use Case clusters.

Employees must be able to reflect critically on the results and decisions of AI, assessing them from an ethical perspective to determine their consistency with the company's values and goals.

Jo Svendsen,
CFO, Søstrene Grene

FIGURE 10

The most relevant and most frequently used Use Case clusters vary from industry to industry*



Ranking based on the percentage of decision-makers surveyed whose companies use and find relevant the respective use case; some places are shared.
Source: Handelsblatt Research Institute/valantic (2026)

valantic Framework forApplied AI success factors

valantic Framework for Applied AI success factors

Management support

Visible support for AI use by management

Corporate strategy

Anchoring AI in corporate strategy with specifically formulated goals

Use cases

Ability to identify and implement business-critical AI use cases

Collaboration

Cross-departmental Working together on the implementation of AI applications

AI lab

AI lab for exploratory and agile Research into use case ideas

AI talent

Success in recruiting and developing AI talent

Empowerment

Empowering employees to work with AI

Governance

Governance structures for Data & AI

Ethics

Confident handling of ethical/legal AI implications

Data

Quality-assured and reliable data basis

Platform

Modular and scalable AI-System architecture or AI platform

LEADERSHIP COMMITMENT

ABILITY TO EXECUTE

CAPABLE PEOPLE

ROBUST OPERATING MODEL

CHAPTER 5

Success factors for AI deployment – it depends on the data basis, but not only that

Various aspects are important for companies to achieve the best possible added value from the use of AI (see "valantic Framework for Applied AI success factors" p. 24 & p. 25). The relevance of a strategic approach and the necessary skills have already been discussed in the context of AI maturity.

Furthermore, the data basis is a key factor for success. At almost 70 percent, most decision-makers state that a quality-assured and trustworthy data basis is very important for the successful use of AI (see Figure 11). A year ago, data was only considered the second most important factor. However, the essential role of data quality for the success of intelligent applications is widely discussed and well known.

The key factor – and this echoes the findings of last year's study – is that success does not depend on data alone, but rests on several pillars. Empowering employees to work with AI is also important and, for this very reason, is an aspect of AI maturity. The potential of the technology unfolds particularly well when companies do not rely on individual, isolated applications, but instead adopt a modular and scalable AI system architecture. This allows different AI tools to exchange information, learn from one another and form an AI network.

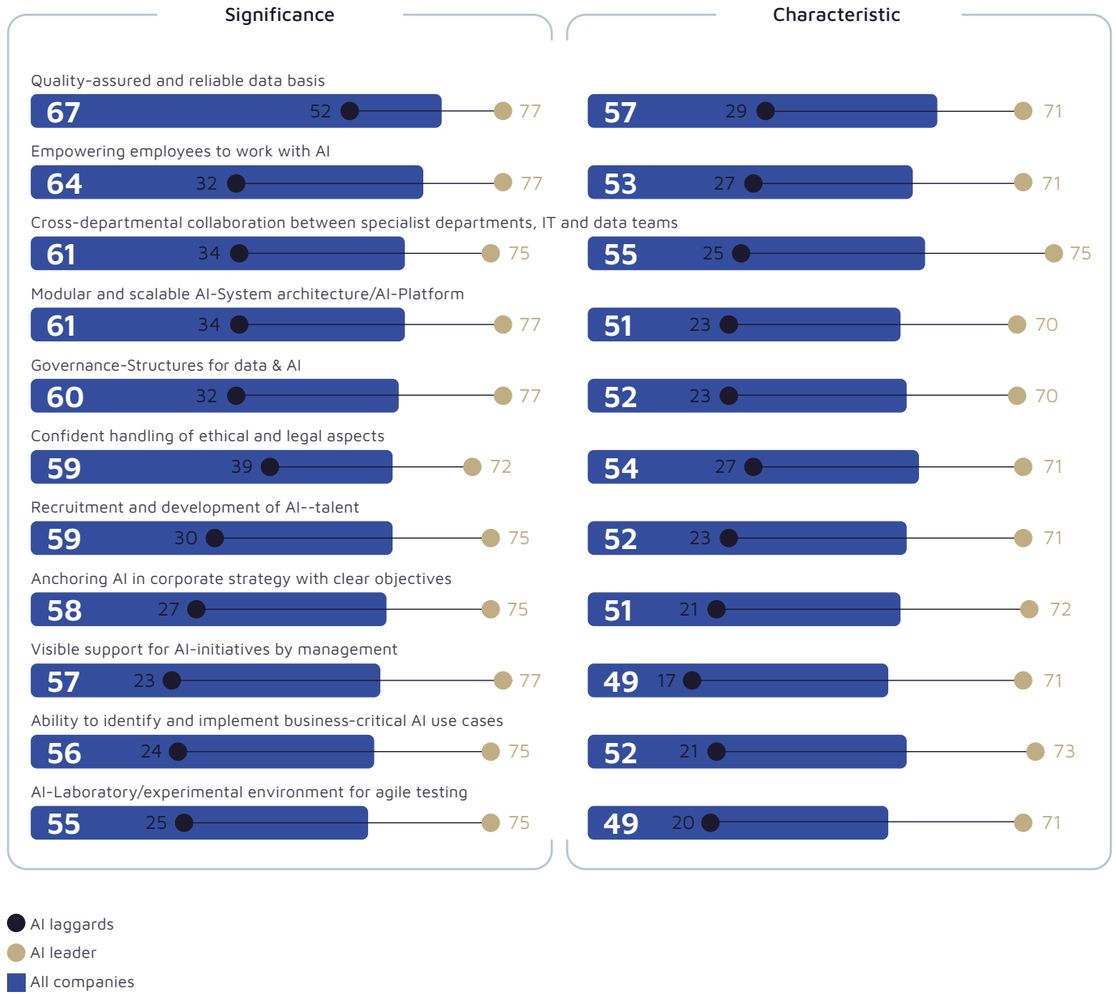
Responsible AI gives us a competitive edge. Many of our customers come from highly regulated industries. Data protection is a key concern for them. And that's why we are so committed to it.

Nicole Blohm,
VP Portfolio Strategy & Product Management, Ricoh USA

Success factors for AI deployment – it depends on the data basis, but not only that

FIGURE 11

AI leaders know what it takes to succeed – and they put it into practice.*



*Question: "How important and how pronounced is the respective success factor?"; percentage of surveyed corporate decision-makers (by AI maturity level) who gave a score of 8 or higher on a scale of 1 (not important at all/not present at all) to 10 (very important/fully established).
Source: Handelsblatt Research Institute/valantic (2026)

In order to identify meaningful use cases in companies, information on requirements and technological possibilities must be brought together. To this end, cross-departmental collaboration between specialist areas, IT and data teams is very important. And last but not least, in view of regulatory requirements such as the EU AI Act, appropriate governance structures are also essential.

However, this awareness of the importance of numerous aspects beyond the data basis for success only emerges with increasing AI maturity. Companies with a high degree of AI maturity demonstrate this awareness. They have recognized that all of the factors considered are important if the use of AI is to be successful. With this knowledge, they also ensure that the factors are established as widely as possible. This is often the case.

In contrast, companies that currently have a low level of AI maturity are still very focused on data as a success factor. This is clearly evident in the responses from decision-makers. They pay little attention to any other factors. It is possible that they are not yet aware of their relevance.

Since they focus primarily on the data basis and attach little importance to other factors, their significance is also extremely low. Even for data that is considered important for success, the significance is not much better.

Basically, it can be observed that companies with a lower level of AI maturity are less concerned with the possibilities for improving the success of AI deployment. They do not consider all factors and therefore do not strengthen them. But if they rely solely on data, these companies will lag behind in the successful use of AI. If they want to move forward, they should learn from the more mature leaders and focus in particular on the success factors.

That said, mature companies can also improve their success by working on the consistent implementation of success factors. For all factors, the proportion of companies in which these aspects have already been implemented to a large extent lags behind the proportion that consider the respective factors to be important. For the use of AI to be a success for companies, even more commitment is needed here.

An ethical approach to AI is essential. Transparency about where AI is used and how decisions are made is essential for building trust.

Dr. Lutz Seidenfaden,
Chief Information Officer (SVP Information Technology), MTU Aero Engines

CHAPTER 6

Future of AI: New requirements for companies

The use of AI is not only resulting in new requirements for companies at present. The technology will also necessitate change in various respects in the future. The potential of AI also extends beyond individual companies. The following assessments by the corporate decision-makers surveyed show the potential impact of AI in the future. These are expectations that may not necessarily come to pass. However, the forecasts paint a picture that illustrates a possible future and that companies can use to prepare themselves as best as possible for future requirements.

79 %

Decision-makers believe that by 2030, companies that do not consistently integrate AI into their core processes and business models will lose their competitive edge.

Source: Handelsblatt Research Institute/valantic (2026)

AI: Key to competitiveness and overall economic growth

The use of AI applications can generate various added values for companies. Investments in the technology pay off. Beyond the added value, however, AI may have a much more existential significance for companies. Without integrating AI into their core processes and business models, companies will no longer be competitive in the future. Almost four-fifths of those surveyed believe that the use of AI is essential for their competitiveness – and thus for the long-term survival of their companies.

This view is particularly widespread among decision-makers from companies with a high level of AI maturity. They are already more aware of how critical and essential the technology is for the survival and competitiveness of their own companies. In other companies, the importance of AI is often still considered marginal, which can prove risky if it results in insufficient commitment.

However, AI not only plays a major role in the economic development of companies, but is also significant for the economy as a whole. Just over four-fifths of corporate decision-makers expect AI to increase overall economic productivity in the future and thus stimulate economic growth. This makes the technology particularly important for Germany, as the country has not seen any significant economic growth for three years in a row.

However, these potentials and added values do not arise automatically. Rather, achieving success with AI requires commitment from companies beyond the mere use of technology. This has already become evident in the discussion of success factors. Ensuring a suitable data basis plays an important role in the success of AI. For two-thirds of respondents, this is more crucial than the performance of AI models. Here again, it is particularly the more AI-mature companies that have already internalized this understanding. However, it bears repeating that success does not depend on data alone.

Currently, it is still very important for many companies to work on the successful implementation of intelligent applications. This is because two-thirds of respondents believe that many companies are failing to achieve business value through the use of AI. In this respect, they need to increase their commitment and specifically strengthen the necessary success factors in order to realize the potential.

81 %

Decision-makers assume that AI will increase overall economic productivity by 2030, thereby stimulating economic growth.

Source: Handelsblatt Research Institute/valantic (2026)

67 %

Decision-makers believe that by 2030, it will not be the performance of AI models but the quality and trustworthiness of the underlying data that will make the difference between leading and lagging companies.

Source: Handelsblatt Research Institute/valantic (2026)

67 %

Decision-makers state that the current AI investment boom will end before 2030 because many companies are unable to derive real business benefits from the technology.

Source: Handelsblatt Research Institute/valantic (2026)

It may take some time, but eventually managers will no longer just lead people, but also AI agents and bots. This will require new and advanced skills.

Nico Michels,

Head of Digital Enterprise, Siemens Digital Industries Software

80 %

Decision-makers believe that by 2030, creativity, empathy and ethical judgment will be the most valuable human skills, while analytical and operational tasks will be largely automated.

Source: Handelsblatt Research Institute/valantic (2026)

82 %

Decision-makers assume that by 2030, most business decisions will be heavily supported by AI systems – the role of executives is changing from decision-makers to reviewers of intelligent systems.

Source: Handelsblatt Research Institute/valantic (2026)

67 %

Decision-makers believe that by 2030, heavy reliance on AI will cause companies to lose key skills in problem solving, innovation and entrepreneurial thinking – and thus lose their adaptability and competitive edge.

Source: Handelsblatt Research Institute/valantic (2026)

75 %

Decision-makers assume that progressive companies will establish targeted programs to promote cognitive performance and mental health by 2030, because AI places less demands on human thinking.

Source: Handelsblatt Research Institute/valantic (2026)

Change for employees and managers

The use of AI requires a strategic examination of the technology. One reason for this is the impact on employees and managers. The aspects of skills and collaboration have already been addressed in the analysis of AI maturity and success factors.

In the future, intelligent applications are likely to take on more analytical and operational tasks. This has concrete consequences for the skills required of employees. Creativity, empathy and ethical judgment will play a central role for them in the future. At least, that is what the majority of respondents believe. Companies should respond to this. These skills are becoming more important and must be promoted more strongly.

The use of AI is significantly changing the role of managers. With the spread of AI agents that are more heavily involved in decision-making processes or even make decisions autonomously, managers themselves have less and less to decide. For more than 80 percent of those surveyed, it is clear that their role is changing and that in the future, their managers will increasingly focus on reviewing the decisions made by AI applications.

All employees must embrace the changes and accept the new roles and skill requirements. The use of AI necessitates change management, the most important aspect of which is consistent further training. This also extends to well-known skills that will be less in demand in the future but will still be needed. These include problem solving, innovation and entrepreneurial thinking. According to approximately 67 percent of respondents, companies are losing these skills due to their dependence on AI. Neglecting these skills has a potentially negative impact on the adaptability and competitiveness of their companies, according to the respondents.

Three-quarters of respondents expect companies to respond by establishing targeted programs to promote cognitive performance and mental health. None of these aspects are directly related to the use of technology, but they are essential pillars of successful and value-adding AI use.

Governance and ethical conduct are key success factors – but what about regulation?

The establishment of governance structures for AI and data is one of the top success factors in the use of AI. With the right governance, companies can ensure that intelligent applications are used in an ethical and transparent manner. This is very important, as more than 80 percent of respondents indicate that companies that invest in ethical, transparent and well-managed AI will be more successful by 2030 than those that focus solely on speed and automation.

Ethical use requires companies to take responsibility for the impact of AI deployment. Large companies in particular, which find it easier to allocate resources for this purpose, should keep this in mind. At least, this is what almost four-fifths of respondents emphasize.

Companies need specific responsibilities for this ethical approach, but also for the strategic discussion of AI in general. These could be dedicated AI executives. According to around 79 percent of respondents, successful companies are characterized by such executives. For example, the main task of a Chief AI Officer would be to take care of all aspects of the use of intelligent applications – including the necessary prerequisites, such as a suitable data basis or the necessary skills among the workforce. In this way, a company can benefit as much as possible from the use of the technology.

82 %

Decision-makers point out that companies that invest in ethical, transparent and well-managed AI will be more successful by 2030 than those that focus solely on speed and automation.

Source: Handelsblatt Research Institute/valantic (2026)

79 %

Decision-makers assume that by 2030, large companies will be expected to take responsibility for the impact of AI – through retraining, fair data use and promoting human well-being.

Source: Handelsblatt Research Institute/valantic (2026)

79 %

Decision-makers believe that by 2030, every successful company will need a dedicated AI executive – such as a chief AI officer, agent team lead, or agent workforce lead – to strategically manage the economic and ethical value of AI.

Source: Handelsblatt Research Institute/valantic (2026)

70 %

Decision-makers criticize that the current wording of the EU AI Act worsens the competitive situation of European companies that use AI.

Source: Handelsblatt Research Institute/valantic (2026)

78 %

Decision-makers expect that adequate regulation of AI in the EU can improve the competitiveness of European companies.

Source: Handelsblatt Research Institute/valantic (2026)

Ethical conduct is not only the responsibility of individual companies; appropriate framework conditions can also provide support in this area. Regulation plays a role here. For example, in mid-March 2024, the European Parliament passed the Artificial Intelligence Act (AI Act). The EU AI Act regulates aspects such as the authorship of information and the guarantee of fair, transparent and ethical algorithms. Depending on the risk associated with the respective AI system, its use is regulated to varying degrees or, in extreme cases, prohibited. If companies do not comply with requirements such as effective risk management or ensuring quality and (technical) documentation, they face financial penalties.

Although this may serve ethical purposes, the majority of respondents view the current regulatory framework critically in terms of the competitive situation of European companies that use AI. For example, some of the experts interviewed point out that the EU AI Act involves significant bureaucratic requirements and thus a great deal of effort. The goal may be right, but the implementation is not appropriate.

However, the corporate decision-makers surveyed do not fundamentally reject regulation in the field of AI. If it is appropriately designed, it may even improve the competitiveness of European companies. It can build trust. Partners and customers who work with such regulated companies in the field of AI can better assess any risks.

AI will be incorporated in the company's future strategy. This also signals to our employees the great importance of this technology.

Jo Svendsen,
CFO, Søstrene Grene

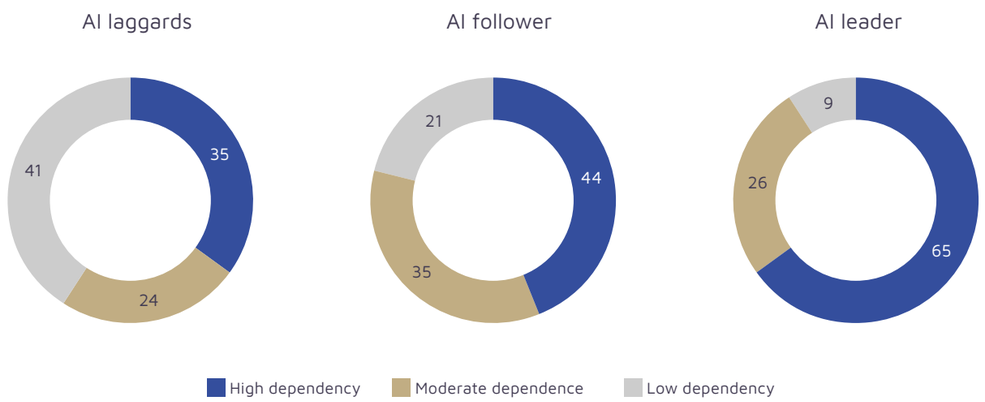
CHAPTER 7

Digital sovereignty – also an issue with AI

One topic that has been discussed more intensively recently against the backdrop of changing global economic and geopolitical conditions is digital sovereignty. This refers to the ability of states, administrations, organizations and companies to act independently with the digital technologies they use and their data. Those who are digitally sovereign have control over their own actions and the degree of their dependence on providers and partners at all times. However, digital sovereignty does not mean self-sufficiency.

FIGURE 12

With AI maturity come dependencies*



* Question: "How dependent is your company on non-European cloud, data, or AI providers today?" Percentage of surveyed corporate decision-makers by AI maturity level.
Source: Handelsblatt Research Institute/valantic (2026)

When strategically addressing AI, the aspect of digital sovereignty must also be taken into account. This is because US companies are currently the main focus of this technology. Although there are also European providers, development is being driven forward particularly in the US.

Many companies are currently focusing primarily on implementing AI applications and are probably paying less attention to the sovereignty aspect. However, if sovereignty is taken into account from the outset, this may potentially increase the effort required for implementation. However, making improvements later on is even more time-consuming and costly once path dependencies have already formed.

In any case, the use of AI creates dependencies. Companies with a high degree of maturity in particular report high levels of dependency in the majority of cases (see Figure 12): 65 percent of decision-makers in these companies say this is the case. Among respondents from companies with a low degree of AI maturity, only 35 percent rate their dependency on non-European cloud, data, or AI providers as high.

The use of AI usually also requires the use of cloud and data services. AI applications are executed in the cloud and are based on large amounts of data.

The connection with maturity is obvious, as companies with a high level of maturity already make more extensive use of the technology, which inevitably results in greater dependencies. This is because the cloud, data and AI providers currently in widespread use are still based in the US or Asia.

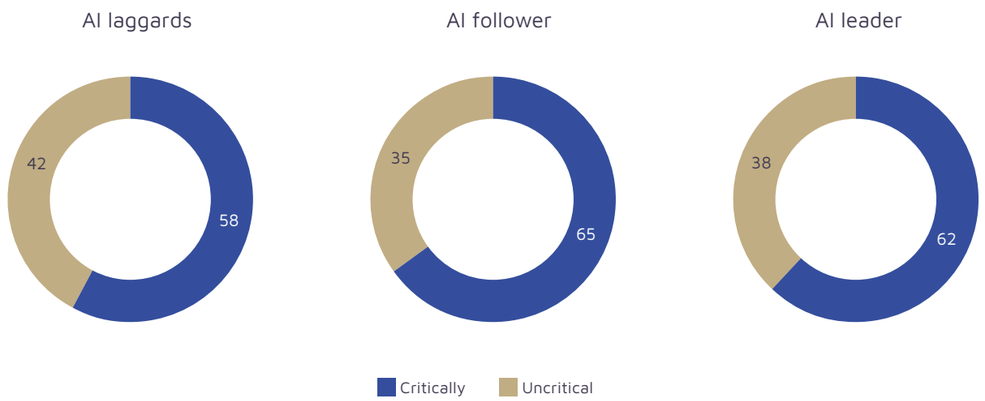
In principle, dependencies are not necessarily a problem, as they are compatible with digital sovereignty as long as companies still have a certain degree of control – for example, over the use of applications or access to their data. The most important thing is to be aware that dependencies can potentially give rise to risks. This is the case for more than three fifths of companies with a higher level of AI maturity (see Figure 13), which view these dependencies as critical to their competitiveness by 2030.

The opportunity to regain digital sovereignty is always particularly great when there are technological leaps forward. If, for example, quantum computing becomes the next "game changer", all efforts should be put into developing this technology – ideally without immediately introducing restrictive regulations at the same time.

Dr. Sebastian Träger,
Head of Digitalization and IT (CDO/CIO), enercity AG

FIGURE 13

Digital dependencies can reduce competitiveness*



* Question: "How critical are dependencies on non-European cloud, data, or AI providers for your competitiveness by 2030?" Percentage of surveyed corporate decision-makers by AI maturity level.
Source: Handelsblatt Research Institute/valantic (2026)

This awareness also provides the basis for possible action to strengthen digital sovereignty in the field of AI. And here it is clear that at least those companies with a high degree of maturity are already active (see Figure 14). Nine out of ten companies have already taken measures to strengthen digital sovereignty.

Of the decision-makers from companies with a low level of AI maturity, 13 percent state that digital sovereignty is not currently a focus and a further 26 percent are still reviewing options.

More advanced companies primarily rely on active investments in their own data or AI infrastructures in Europe and on collaborations with European technology or cloud providers to strengthen their sovereignty. Participation in national or European initiatives is of rather less importance.

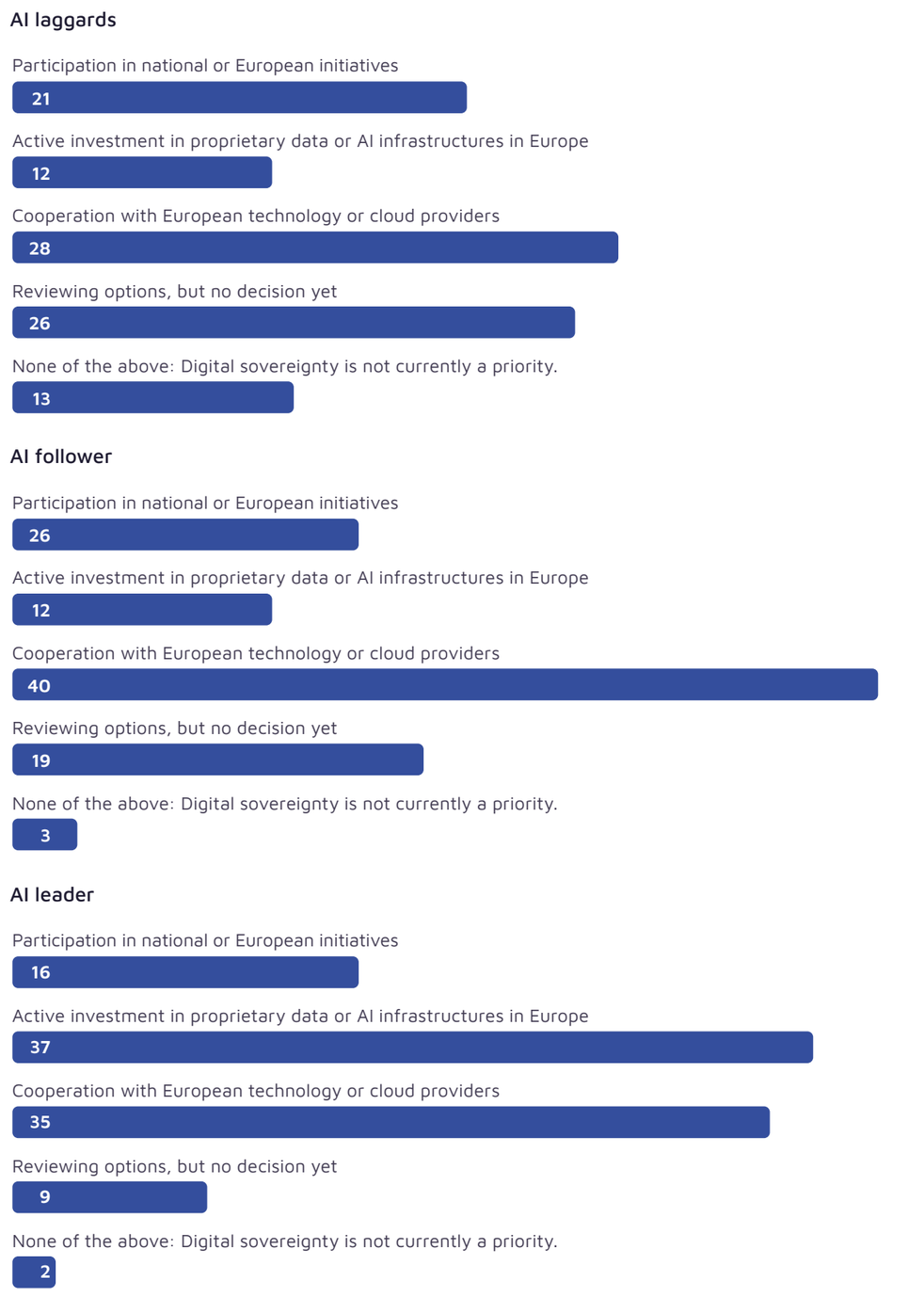
In any case, it is important to consider strengthening AI sovereignty from the outset for the reasons mentioned above. Even if there are currently few alternatives to US providers, it is at least important to raise awareness that the use of AI also poses challenges for companies.

Whether the use of AI works well also depends on personal attitude. Being willing to experiment, trusting AI and being open to trying out new tools again and again helps a lot.

Dr. Kerstin Borgards,
Global Head of Strategy Realization and Process Improvements – Pharma Clinical Manufacturing Network, Roche

FIGURE 14

AI leaders are most focused on digital sovereignty*



* Question: "What measures is your company planning to take to build its own sovereign data or AI capabilities within Europe?" Percentage of corporate decision-makers surveyed, by AI maturity level.
Source: Handelsblatt Research Institute/valantic (2026)

CHAPTER 8

Conclusion

AI is the trend technology of 2026 and will be essential for the success of companies over the next five years. It is the starting point for generating added value in various areas. At the same time, AI represents the essential basis for the future competitiveness of companies and thus their very existence.

However, in order to enable the comprehensive use of intelligent applications, companies must take various points into account. AI requires a strategic approach. Numerous aspects must be taken into account during the preparation phase to ensure success. Although a quality-assured and trustworthy data basis plays a major role here, it is only one of many success factors. For example, empowering employees, cross-departmental collaboration and appropriate governance structures are also important.

Companies should generally demonstrate a suitable level of maturity for AI deployment, which manifests itself in two areas: "employee skills" and "strategic use of AI". However, only one-third of companies have achieved a high and thus adequate level of maturity.

Although only a few companies are still in the early stages, many still need to work on their AI maturity in order to be well equipped to use the technology.

Only with the appropriate maturity does the awareness arise that a whole range of success factors are important, which means that companies that are more mature in terms of AI are more likely to achieve added value.

The great significance of this technology stems not only from its potential for individual companies; AI is also important in economic terms. It increases overall economic productivity and thus stimulates economic growth. Germany in particular would currently be very dependent on this.

Furthermore, the use of AI also results in a need for change management within companies. New skills become relevant for employees and companies must ensure that they promote specific competencies in a targeted manner, otherwise they will be lost. Leadership roles are also changing and managers must be prepared for this.

All these points illustrate that implementing AI is not a quick process that can be carried out just like that. It requires the right preparation and constant monitoring to ensure that the measures taken are fulfilling their objectives.

This also includes the issue of digital sovereignty. The present study report shows that the companies surveyed have recognized the challenges that may arise from digital dependencies. Companies with a high level of AI maturity in particular have begun to actively strengthen their sovereignty.

The underlying finding is that if the aspect of sovereignty is considered from the outset in the digital transformation and strengthened as much as possible, higher costs can be avoided at a later stage.

The results of the analysis show that companies with a high level of maturity implement precisely those aspects that make AI deployment a success. Other companies can learn from these leaders in the use of AI (see box "Key takeaways from AI leaders").

Key takeaways that can be learned from AI leaders

- Strategic discussion and securing the relevant AI skills are the foundation for promising, value-adding AI deployment.
- Intelligent applications should not only be used for internal processes such as document and data management, but also, in the medium term, in core areas such as product and application development.
- A comprehensive and high-quality data foundation is more crucial to AI success than the performance of the models.
- However, data is not the only factor for success. Companies must be aware that a variety of aspects are important for the successful use of AI. All of these factors should be established and continuously strengthened.
- The use of intelligent applications is not only the starting point for achieving added value, but also the key to future competitiveness.
- The use of AI creates dependencies on non-European cloud, data, or AI providers that may pose potential risks to companies' digital sovereignty.
- It is important to take measures to strengthen digital sovereignty in the field of AI.

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More than 2,000 digitalization projects over the past five years have shown that valantic understands the business challenges of its customers. From strategy to tangible implementation, they have the necessary expertise to accompany projects from start to finish and make them successful. In this, valantic combines technological expertise with industry knowledge and the human touch.

valantic consults companies on all challenges of digital transformation, helps them to better manage their corporate performance and leverage the potential of data and artificial intelligence. In addition, valantic supports its customers in optimally shaping the customer experience, profitably using core digitalization technologies and optimizing company processes from end to end.

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As of February 2026

Gender in the text: Where the generic masculine form is used (, especially in compound words), this is solely for the sake of readability (); in principle, all genders are included ().