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Enterprise AI Maturity Index for Technology

2026

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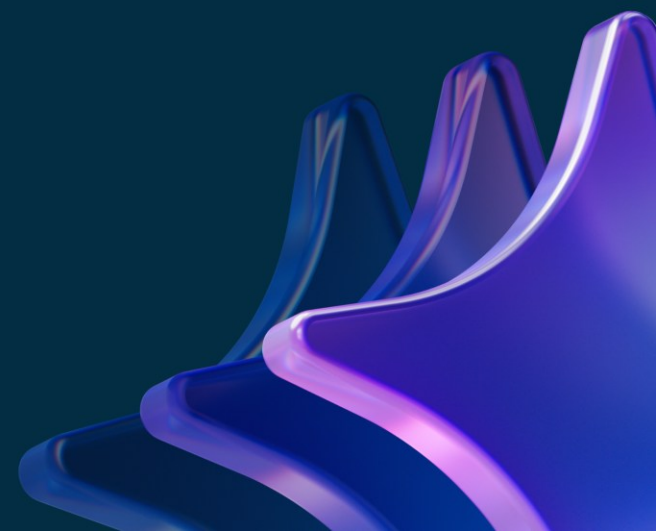

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Everyone bought AI. Few built for it.

Agentic AI is here. Can tech lead the transformation it's selling to everyone else?

Technology runs on disruption: rapid release cycles, constant iteration, and the relentless pressure to obsolete yourself before a competitor does. Agentic AI—AI that doesn't just assist, but autonomously senses, decides, and acts—is the sharpest disruption yet. And for technology, it's arriving on two fronts at once.

No other industry carries this dual mandate. Technology companies must deploy agentic AI internally while simultaneously shipping agentic products to customers who are watching closely. Your market judges your AI maturity before it trusts your AI products. Falling behind isn't just a competitive risk. It's a credibility problem.

In this, our third annual AI Maturity Index, ServiceNow and NVIDIA surveyed more than 4,500 executives and employees across 19 countries to understand how organizations deploy AI and where they get stuck. The technology picture is striking: after a dip in 2025, maturity scores rebounded sharply.

Yet beneath that momentum, a critical gap is forming. Most firms still apply AI to automate a single task—a smarter support bot, faster code review, AI-assisted triage. That's not agentic AI. That's AI as a tool. The shift to agents that sense, decide, and act across entire workflows—autonomously, end to end—is where most organizations remain stuck.

The leaders have made that shift. They deploy AI agents across entire workflows—from software delivery and customer success to infrastructure operations and product development. These agents don't just respond to prompts. They investigate, orchestrate, and adapt, with multiple agents working in concert to compress work that once took days into minutes.

But deploying agents without governing them isn't a strategy. It's a risk. For tech companies, it's a double exposure: you're running agents internally and selling them externally. The organizations pulling ahead run their agents using guard rails like AI Control Tower—a centralized layer that supervises every agent action, enforces guardrails, and keeps a human in the loop where it matters most.

This report brings together ServiceNow's view of how work moves across an enterprise and NVIDIA's view of what is technically possible with agentic AI today. It shows where agents are delivering results—and what separates the organizations scaling from those that are stuck.

In this industry, you can't sell what you haven't mastered.

Cedric Parent

GVP, Global Industries Go-to-Market
ServiceNow

The gap between AI ambition and execution

Technology providers have made strong advances in AI maturity and dramatically increased AI investments—this industry is committed and on par with the most mature sectors. The question now is whether tech providers are built for what comes next.

To find out, we partnered with ThoughtLab to survey 425 technology executives and 317 employees across hardware, software, service, and integrated technology providers.

We measured AI progress across seven pillars: vision and leadership, management and culture, data modernization, AI governance, talent and skills, AI-enabled workflows, and driving value from AI. Full methodology details are available in the appendix.

A small group made a different bet. Early.
While most organizations deployed AI into existing infrastructure and moved fast, a handful paused to ask a harder question: Are we building something that will scale or something that will break? That distinction is now showing up in the results—and the gap is widening. The organizations pulling ahead aren't those with the most advanced models. They're the ones with the infrastructure to execute reliably at scale.

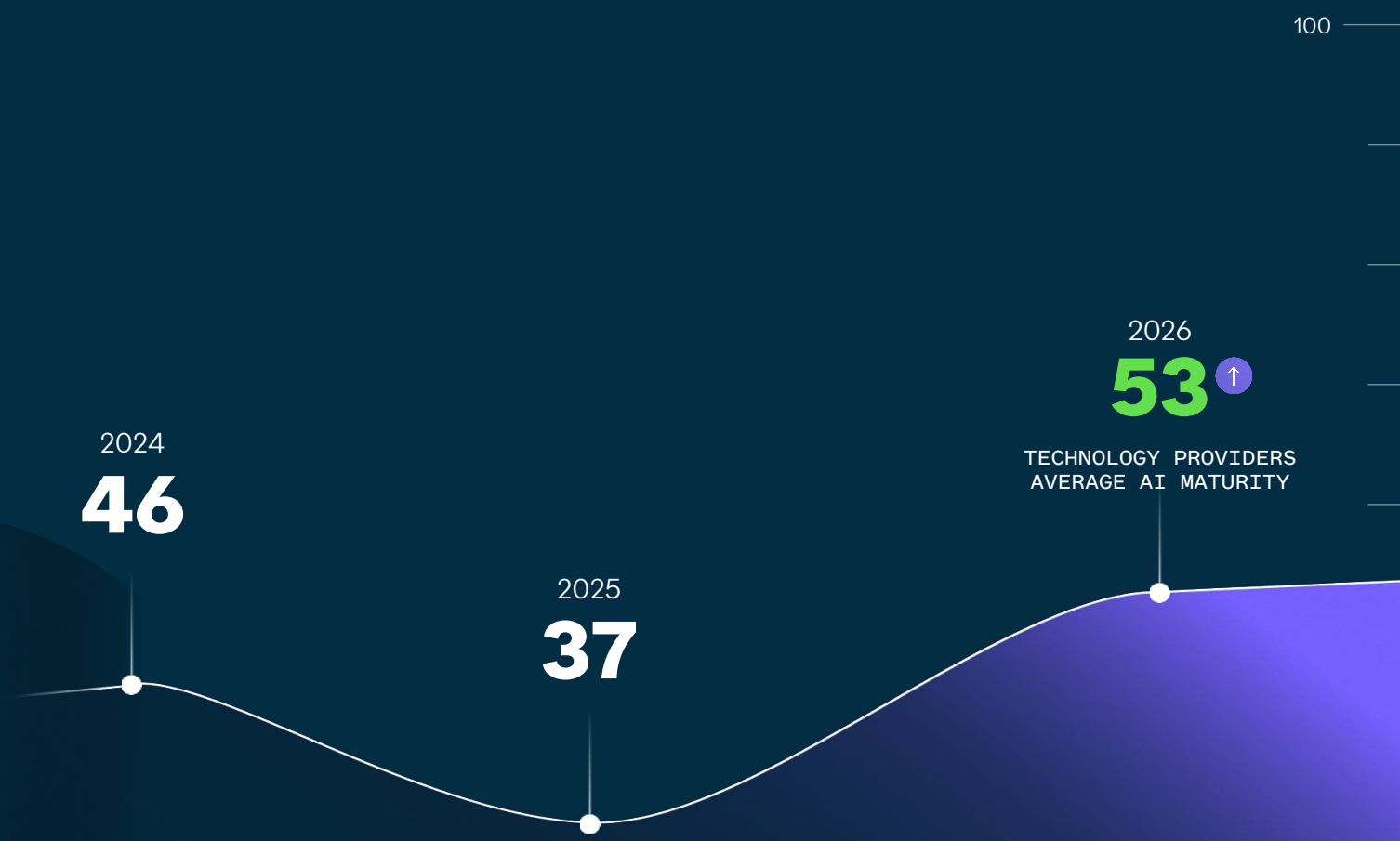
We call them Pacesetters, and what they do differently is a roadmap for others.
They represent 25% of this study's technology providers. They are defined by orchestration, connected data, and governance built before deployment, not after. This report shows how they got there and what others can do to follow.

Tech providers are bolting AI onto broken infrastructure

- **Investment is outpacing infrastructure.**
  While spending on AI jumped 80% with another 71% increase expected this year among technology providers, most still struggle with inadequate data accuracy & access and over half struggle with high costs. The money is moving. The architecture isn't.
- **Agentic AI is everywhere. Autonomous work is not.**
  Sixty-seven percent of technology providers have moved beyond piloting agentic AI, but only 10% have made meaningful progress building autonomous, multistep workflows. Most are paying for a capability they haven't unlocked.
- **Confidence is masking an execution gap.**
  Overall, AI maturity rebounded to 53 out of 100. But AI-enabled workflows score is 41—the lowest of all seven pillars. The ambition is real. The infrastructure to execute it isn't.

Underneath the confidence, chaos is growing

AI maturity rebounds. Execution at scale lags.



Average pillar scores for technology providers

Technology companies stand out as one of the most advanced sectors in AI innovation. They have built strong AI visions and strategies, and the cultures and data systems to support them. However, they fall short on people and process, where they face persistent gaps in AI talent and AI-engineered workflows.

Vision leads, execution lags

Technology firms score highest in vision, strategy, and leadership, well ahead of their scores for talent and skills and AI-enabled workflows, showing that strategic intent is outpacing operational follow-through.

"There is a time gap from vision, strategy, and leadership to execution," explains Dirk Ramhorst, Chief Transformation Officer at ServiceNow. "But rather than rush, it's important to execute and automate in the right way. In the past, many companies just digitalized bad processes, and if they just put in AI, these would become bad processes on steroids."

AI skills are a major constraint

For tech, AI adoption is moving faster than workforce readiness. According to Jeremy Hess, Director of Product Management for the technology industry at ServiceNow, "AI arrived overnight for tech firms, but the AI experts didn't. Everybody must now upskill as AI technology keeps changing under their feet." Ramhorst stresses that tech companies need to "build an AI mindset that reimagines how work gets done. This requires new skills and new ways of working across the organization."

AI spend surges. So does the pressure to deliver.

Reflecting AI's strategic importance to the industry, tech firms spend more on AI as a percentage of IT spending than any other sector surveyed. This greater investment yields higher returns, well above the all-industry average, giving executives the confidence to shift from experimentation to scaled deployment.

ROI is rising

"In some areas, such as customer support, you can get value pretty quickly," says Luke Morris, Global Head of Technology Providers GTM at ServiceNow. But to do so, firms need to identify the areas that will generate the best payback, notes Ramhorst. "They need to make a very specific use case evaluation to ensure it will achieve a targeted ROI," he says.

AI spending as a % of IT budget

Up from 17% in 2025

19%

YoY increase in AI as % of revenue

2025 → 2026

80%

ROI on AI

Increase to 181% by 2028

151%

Survey-reported projection

The foundation has cracks

The tech industry's ambition is running up against a familiar reality: AI scale depends on foundations that many companies still have not fully modernized. Data quality, access, and management remain major constraints, and those issues are compounded by infrastructure complexity, integration burdens, and the cost of building for enterprise-grade AI.

"The average large enterprise has more than 900 applications running, not counting shadow IT," notes Hess. "It's very hard to have control over your data when you have that many databases and applications in the wild. It's a huge issue for tech companies, with different departments on different systems and platforms that don't talk to each other."

High costs can be another issue, particularly if companies lack the needed controls. "Consumption rates, and bills, are getting sizeable, particularly for companies with thousands of employees using AI," Hess says. "At some point, companies will say enough is enough."

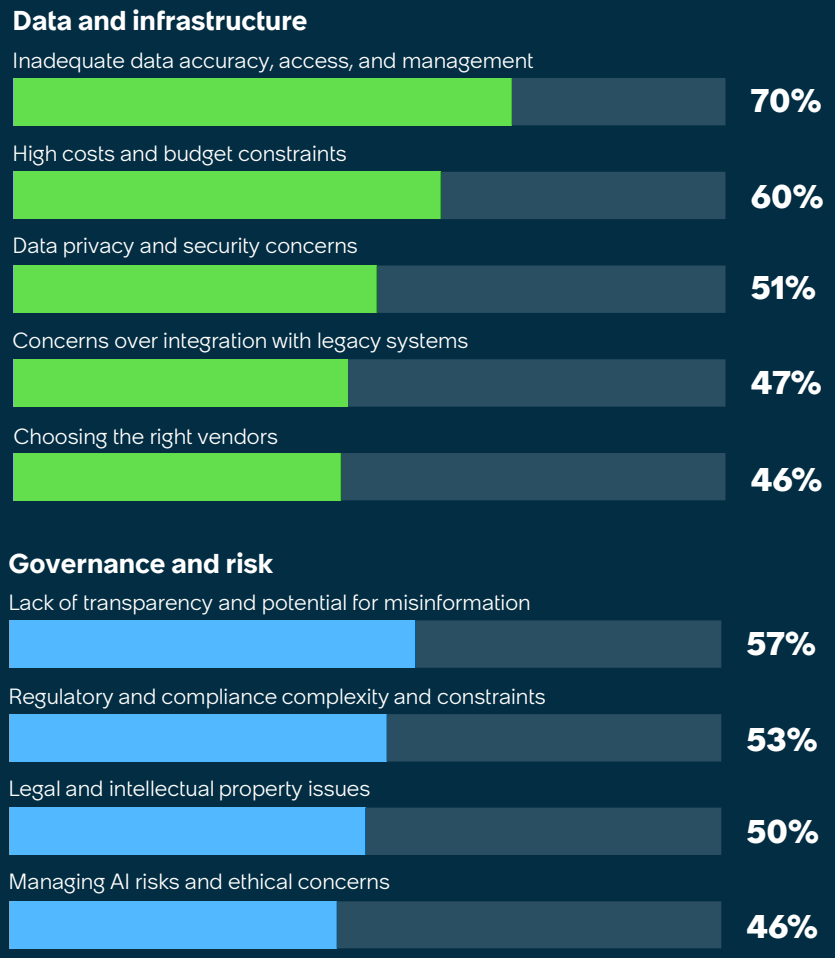
Governance and risk

Governance challenges add a layer of friction. Concerns around misinformation, privacy, compliance, intellectual property, and broader ethical risk show that firms are being forced to manage AI as both an innovation opportunity and a control challenge. That tension is especially acute in technology, where companies may be deploying AI internally while also selling AI-enabled products to customers who expect trust, transparency, and resilience.

Ramhorst points out that governance issues can limit companies with many process variations across subsidiaries in different countries, and lack of transparency on where data is located. "But they need to understand that AI can help them out in solving these problems and start moving."

As AI scales, cracks become chasms

WHERE MOST TECHNOLOGY PROVIDERS GET STUCK



Automating yesterday's work vs. reinventing tomorrow's

Tech firms embrace AI across their value chains

Technology companies are moving beyond AI pilots to implementation, wiring AI into how they sell, build, deliver, and support everything they do. "AI is not just sitting in the corner," says Morris. "For advanced firms, it is showing up everywhere, from how they engage customers to how they run the back office. It's becoming part of the whole value chain, not just a single use case."

Tech firms across subsectors make common use of AI for the fundamentals, such as marketing and customer management. "AI is already acting as a sales coach, preparing people for customer interactions by pulling together everything it knows about the customer," says Ramhorst.

Go your own way

But each subsector is going much further, tailoring AI to the nuances of their own operating models. Like other manufacturers, **hardware companies** leverage AI across product lifecycles, from concept and production to distribution and support. The most common uses are research and development, design and engineering prototyping, and quality control and inspection, which help to shorten development cycles and improve reliability. Most hardware firms also use AI to support frontline workers and after-sales service.

IT service providers lean into AI where relationships and judgments matter most. Their top use case is proactive relationship management, followed by quality assurance and risk management, consulting and advisory services, and support and maintenance. Hess observes that these firms are still under pressure from short contracts and thin margins. "They must prove AI's value while it's rapidly changing."

Software companies bring AI directly into the product loop. They deploy it in software development and dynamic customer analysis, as well as product management, maintenance, updates, customer support, and retention. "Everybody is trying to transition away from writing code manually," says Hess. "Within a couple of years, the bulk of the work in software development and product management will be done by AI."

Key tech provider use cases	AI adoption
Hardware firm	
Research and development	**59%**
Marketing and demand generation	**56%**
Quality control and inspection	**53%**
Design and engineering prototyping	**53%**
Frontline workers	**52%**
Customer service	**51%**
IT service provider	
Proactive relationship management	**71%**
Quality assurance and risk management	**63%**
Marketing and demand generation	**57%**
Consulting and advisory service	**54%**
Support and maintenance	**53%**
Market and competitive intelligence	**53%**
Software company	
Software development	**61%**
Dynamic customer analysis	**61%**
Product management	**58%**
Maintenance and updates	**58%**
Customer support and retention	**58%**

NVIDIA

Speeding workflows with AI and agents

NVIDIA's rapid rise as the backbone of global AI infrastructure has transformed the company into a supplier of "AI factories", fully integrated AI data centers that combine computing power, networking storage, and a rich software stack to deliver intelligence at scale. That shift has led to far greater complexity and operational pressure.

"The increasing scale of the business, our growing partner network, the complexity of what we sell, it all really compounds. Old processes that used to work just a few years ago no longer work, so we've had to re-engineer everything." says Oliver Weber, vice president of worldwide sales operations at NVIDIA.

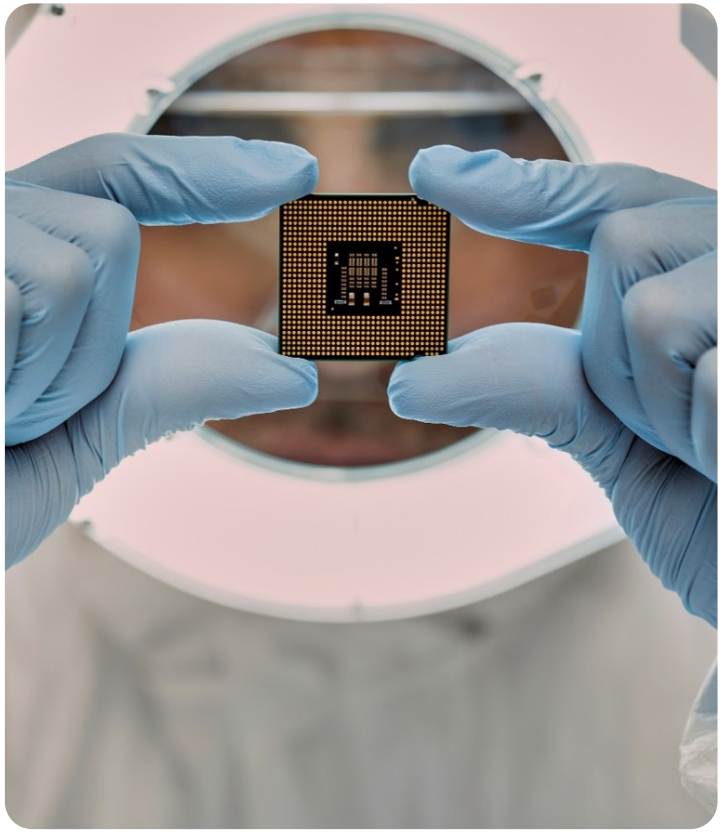
AI to the rescue

He explains that tasks like assembling bills of materials, which used to be straightforward, became a puzzle involving thousands of components for data centers. "There are many valid combinations of those products, but even more invalid ones," says Weber. "Every quote had to be checked by senior solution architects, sometimes taking up to five days, which was not a good use of their time."

To solve this problem, NVIDIA implemented an AI-enabled configuration solution. Buyers now answer a concise set of questions, such as the number of racks, nodes per rack, and switch locations, and the system assembles a validated configuration and pricing package using encoded product rules. "We've got it down to five minutes now," says Weber. "This change not only freed staff from repetitive configuration but also opened the door to expanding quoting beyond internal experts."

Building agentic support

NVIDIA uses similar agentic workflows for field application engineers. An AI agent analyzes logs, detects patterns, links them to prior cases, proposes likely root causes, and drafts a customer-ready response. "My advice is to start now," Weber says. "Don't wait for perfect. The technology is moving so fast, you just have to pick your most painful problem, come up with a minimal solution, and get it into production."



Agentic AI is everywhere. Autonomous work is not.

Tech firms are turning to agentic AI, but adoption remains early relative to its potential. Our research shows that many organizations are using agents in bounded, task-specific ways, rather than deploying them to orchestrate autonomous, multi-step work across functions. In practice, the sector is still learning how to shift from agentic support to autonomous action.

Easy to build, hard to trust

"With the newer AI models, the barriers to entry are really low in creating AI agents," says Morris. "But many tech companies are afraid of the risks of letting the floodgates open and putting these agents into production within the enterprise."

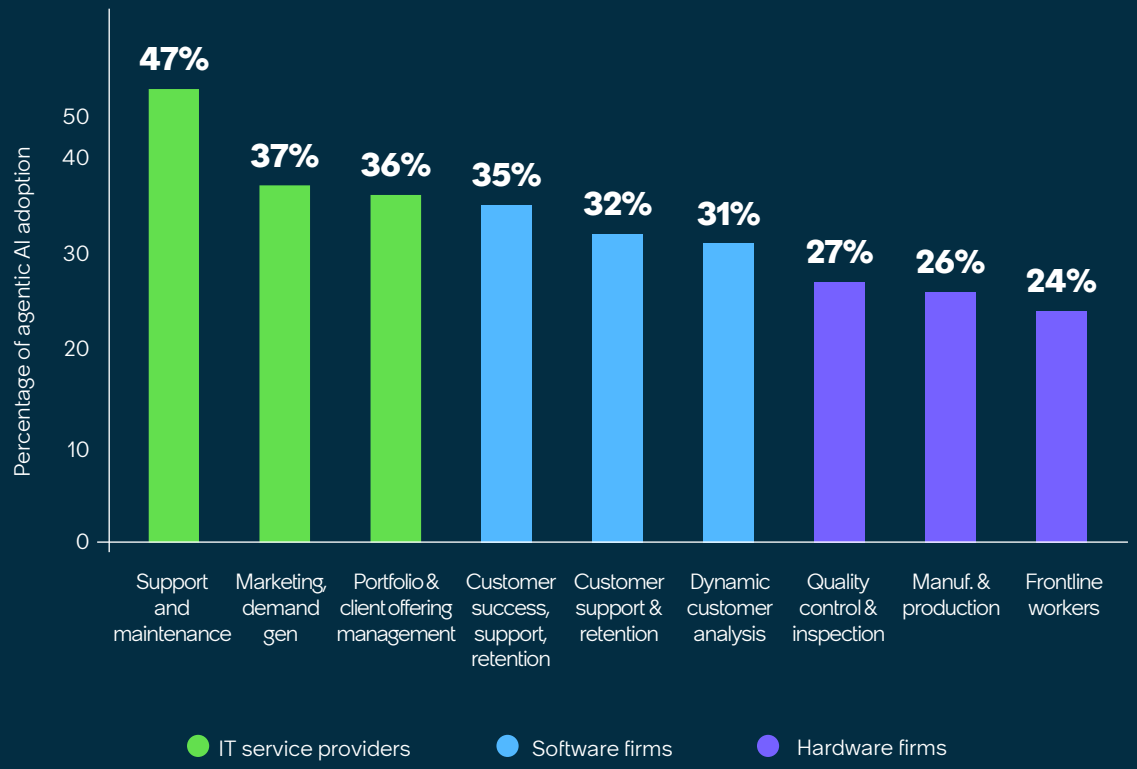
Hess believes the firms to need install the right foundations before deploying agentic AI. "People need to lay that groundwork first," he says. "Before they can move into a more autonomous multi-step environment, all the pieces must be there for it to be safe and scalable."

Finding the right agentic path

Nonetheless, tech companies are pushing ahead in many areas. In services, the appeal lies in support, maintenance, and portfolio management. In software, it is strongest in customer-facing and analytical workflows. In hardware, it is emerging in operational environments such as quality and production. These are all areas where agents can potentially connect decisions, actions, and follow-through, making them a bridge between isolated automation and end-to-end orchestration.

"The real opportunity is reimagining work," says Ramhorst. "It is seeing where agentic AI can orchestrate outcomes across workflows, not just assist with isolated tasks."

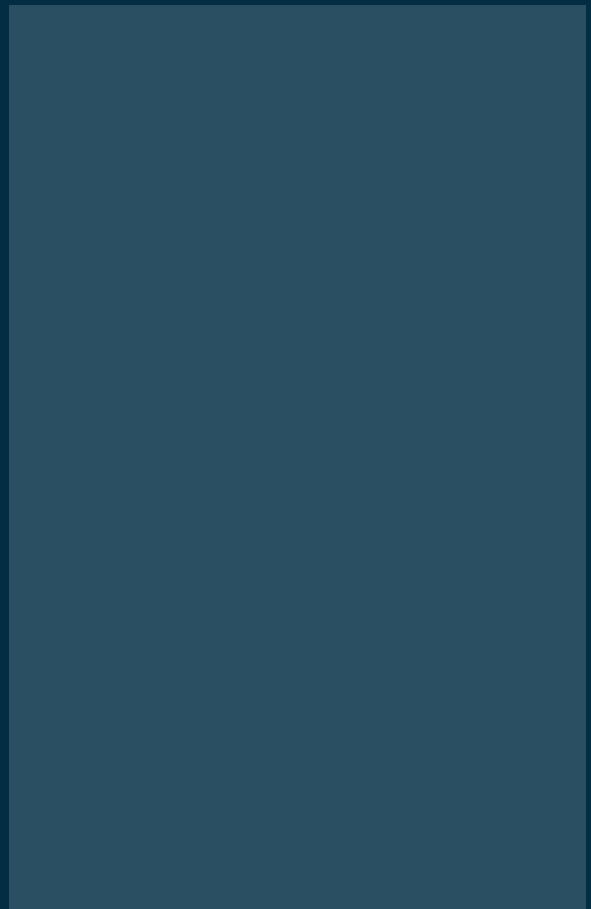
Top agentic AI initiatives for technology firms



Most are paying for a capability they haven't yet unlocked

67%

of tech firms are using agentic AI



ONLY

10%

have made significant progress using agentic AI to create autonomous, multistep workflows

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Where AI is already delivering

Design and engineering

Designing micro-chips with the help of AI has reduced the cost of the overall R&D.

Senior Director, Japan

Software development

Previous release scenarios are systematically replayed in software tests to validate behavior, prevent defects, and ensure smooth operation for end users.

Senior Vice President, US

Sales

We implemented AI-driven conversational sales bots, increasing lead generation by 25-40% and enabling 24/7 customer conversion.

Senior Vice President, Spain

Marketing and competitive intelligence

We use AI to continuously analyze market and competitor signals, enabling faster and more confident strategic decisions.

Director, Saudi Arabia

Quality assurance

Through AI driven evaluations, we improved quality assurance across all operations while reducing review time.

Chief Procurement Officer, UAE

Maintenance

AI helped us create smart maintenance services for our hardware, turning support into a recurring revenue stream.

Director, France

Technology firms are managing two separate realities

Every week, I sit across from technology executives who can tell me exactly where their AI strategy is going. Very few can tell me where it's getting stuck.

That disconnect is what this section of the research is really about. It's not a technology problem. The tools exist. The budgets are moving. What's missing, in almost every conversation I have, is a clear line of sight between what AI is doing today and what it needs to do next—across the whole organization, not just inside the teams that got there first.

The data on AI is instructive here. Adoption is real, but it's fragile. Most firms are running agents in the places where it was easiest to start—a support workflow, a customer-facing bot, a code review process. That's fine as a proof point. It's not a foundation. When I push on what it would take to extend those agents across functions, the conversation changes quickly. Data isn't connected. Governance hasn't caught up. Different teams are running different tools with no shared architecture underneath.

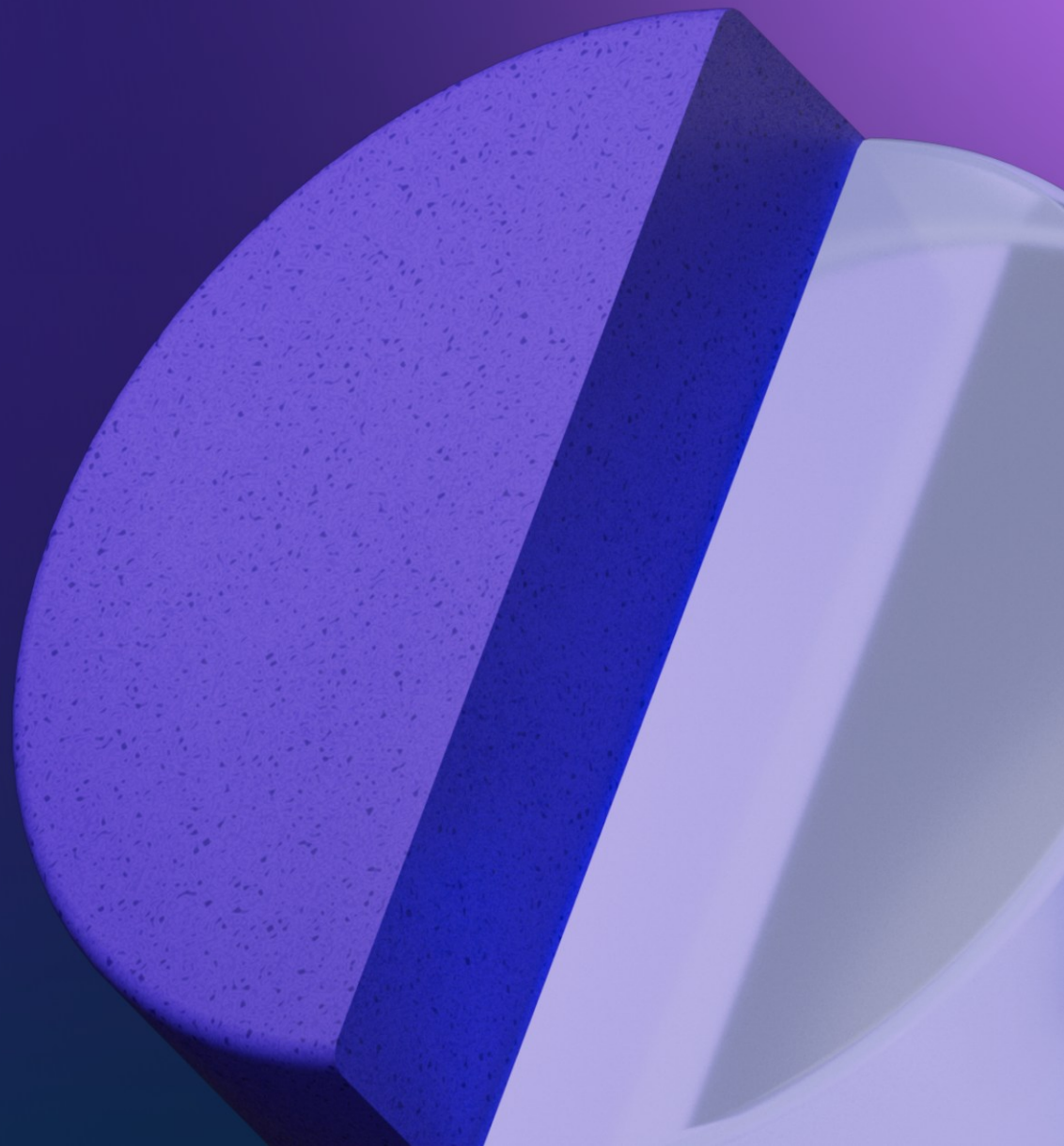
What that means in practice is that a lot of organizations are managing two separate realities: an AI strategy that looks coherent from the top, and an operating model that's still running on the same structures it had two years ago. The gap between those two things is where execution stalls.

The firms I see moving out of that gap aren't necessarily the biggest or the fastest. They're the ones where someone—usually a CIO or a COO—decided to stop adding AI to the existing model and start asking what the model should look like if AI were built into it from the start. That's a harder question. It's also the only one that leads somewhere different.

John Spencer

Vice President, Technology GTM, ServiceNow

Reinvention starts here



Harnessing AI: From efficiency tool to transformation engine

Over the last year, AI maturity has jumped for tech companies as they move from experimenting with AI to infusing it into their business. Unlike other industries, the technology sector is using AI to transform on two fronts: internally to improve productivity and decision-making, and externally to spawn new products, services, and revenue channels.

"AI is fast moving from an efficiency tool to a central part of the sector's business model and market identity," says Ramhorst.

Seizing the promise of AI
For decades, tech firms have dreamed about seamless, end-to-end automation, according to Hess. "Now the promise of automation is finally coming true," he says. "AI unlocks creativity and entirely new ways to solve problems. It's not just about building a better mousetrap. Now you have access to intelligence that allows you to do things you couldn't do before."

The need for speed
The tech industry's dual role as AI users and providers adds to the urgency for executives. They increasingly view AI-skilled talent as pivotal for strategic execution, and many organizations want to become AI-first rather than simply AI-enabled. At the same time, executives recognize that customers now expect technology partners to bring AI capabilities that create measurable value, not just lower-cost delivery.

"AI is becoming an industry prerequisite," according to Ramhorst. "A tech company without AI will soon be dead. Not moving on AI is not an option. It is simply a question of how fast to go to gain a competitive edge."

5.40 employee work hours saved per week, reducing stress and improving morale

78% of tech firms with revenue over $25 billion and 55% overall, want to become AI-first organizations

64% of tech firms say that employees with AI skills will play a crucial role in achieving their goals

56% of tech firms say that AI will help them deliver greater value to customers beyond optimization & efficiency

Pacesetters aren't just AI enabled. They're AI first.

Every year, a group pulls ahead in the study. We call them Pacesetters
This year's analysis reveals that 25% of tech firms are Pacesetters. These elite firms have an average maturity score of 74, vs a score of 46 for others. What defines them is a fundamental decision about how AI fits into the enterprise. While most organizations deploy AI into existing structures, Pacesetters build their organizations around AI.

End-to-end orchestration drives business reinvention
Pacesetters treat orchestration as the foundation. They connect data, workflows, and governance across the entire enterprise so that AI doesn't just assist people, it completes work end to end. That structural choice is what separates an organization with a lot of AI tools from one that is genuinely AI-first. And for Pacesetters, that structure includes their people. The organizations pulling ahead are redesigning how humans and AI work together, not just how technology is deployed.

What Pacesetter status delivers

Pacesetters achieve higher ROI

199%
AVERAGE ROI IN TWO YEARS

168%
AVERAGE ROI TODAY

Exponential impact compared to others

5.5x
More likely to use AI to improve or create new products, services, and revenue channels

5x
More likely to see greater productivity

2.6x
More likely to see reduced risks

2.3x
More likely to see improved decision making

Five strategies separating Pacesetters from the rest of technology firms

The gap between where most technology firms are and where Pacesetters operate is wide, but it is closable. The research reveals key strategies that define how leading firms are pulling ahead.

1. Set the vision. Bring everyone with you.
2. Control your data. Unleash your AI.
3. Move beyond automation. Start orchestrating.
4. Build the workforce your AI strategy demands.
5. Accelerate governance. Close the chaos gap.

LESSON 1

Set the vision. Bring everyone with you.

Pacesetters make AI a strategic imperative rather than just a technical program. They are more likely to develop enterprise plans, measurable objectives, and ongoing communication that clarifies where AI matters most for their organizations. That creates a stronger through-line from ambition to value-driven execution and dispels the strategic ambiguity that slows down many firms.

"Pacesetters think beyond efficiency gains," says Ramhorst. "They focus on the impact on the bottom line, which requires rethinking their business models." Pacesetters also give their staff greater freedom to act. "Their CXOs encourage innovation," says Morris. "They say: 'If you fail, that's okay, no problem. Just keep going until you find the path to success."

Pacesetters promote ongoing reinvention

As AI adoption evolves, Pacesetters revisit their strategies. Rather than sticking to hard-and-fast AI plans, they constantly refine priorities, communicate progress broadly, and align leadership around business outcomes, workforce impact, and operational change.

"For Pacesetters, change management is a crucial investment, because they know they must use the experience and expertise of the workforce when they build AI systems and workflows," says Morris. "If employees don't have input, they may not use it once it is built."

Pacesetters commit at every level

1. **Create an implementation plan with timelines and a defined set of metrics for AI transformation**
   78% of Pacesetters vs. 22% of others
2. **Communicate AI vision widely across the organization**
   73% of Pacesetters vs. 33% of others
3. **Build an AI mindset that reimagines how work is done**
   72% of Pacesetters vs. 34% of others
4. **Create processes for adapting and refining AI strategy**
   70% of Pacesetters vs. 16% of others
5. **Set a shared strategic vision for AI transformation beyond cost take-out and efficiency gains**
   68% of Pacesetters vs. 21% of others

LESSON 2

Control your data. Unleash your AI.

Pacesetters treat data as a precious strategic asset. They are more likely to establish clear ownership, improve standardization, strengthen governance, and drive integration to make data usable across the enterprise. That gives AI systems access to the data consistency and context required for reliable AI performance at scale.

Pacesetters lay a solid data foundation

Ramhorst argues that effective data management begins with a deep cultural shift in how organizations value their information. Too many companies, he says, are "sitting on a very rich treasure of data" without recognizing its immense value. "Pacesetters start by mapping where data is generated and how it flows, paying particular attention to customer interactions," says Ramhorst. "Putting a strong data foundation in place is what allows Pacesetters to unleash AI confidently," he notes.

"Pacesetters not only value their data. They also trust it more, because of the advanced data systems and tools they have in place," says Morris. These include data cataloging, governance, and multi-cloud connector platforms that make data findable and meaningful. Pacesetters also use AI itself to handle the mundane work required to ensure data hygiene. "No one wants to go clean up the data," says Morris. "The huge amount of human manual effort needed in the past has been a big barrier to success. AI can change that."

Pacesetters have AI-ready data

1. **Set up policies for data ownership and control**
   66% of Pacesetters vs. 26% of others
2. **Create processes to clean, tag, and standardize data**
   65% of Pacesetters vs. 14% of others
3. **Implement tools to collect and track data in real time**
   63% of Pacesetters vs. 13% of others
4. **Acquire resources and technologies to integrate and optimize data**
   60% of Pacesetters vs. 15% of others
5. **Use AI to improve data migration, creation, and management**
   59% of Pacesetters vs. 15% of others

LESSON 3

Move beyond automation. Start orchestrating.

Pacesetters use AI across workflows rather than confining it to individual tasks or isolated tools. They are more likely to connect functions, decisions, and actions across the enterprise, allowing AI to support coordination as well as automation. This approach is especially important in technology organizations, where work often spans product, engineering, customer, support, and operations teams.

"Pacesetters are able to automate workflows with AI that they weren't able to tackle before because the intelligence is now there to do it," says Hess. He cites event and alert management in a data center. "The quantity of logs and data is huge," he says. "In the past, systems weren't fast enough to look for patterns at scale and doing it manually just wasn't possible."

New workflows and orchestration

Ramhorst cites a similar example at Siemens, where AI automation of new workflows in a production facility has enabled better predictive maintenance. "Previously data scientists took weeks to find problems by analyzing the data, and now they can do it in real time," he says.

Where Pacesetters truly set themselves apart is in using an integrated platform as an 'orchestration layer' that stitches together and governs AI workflows and agents. "This acts as a bridge across the whole landscape, regardless of what large language models they are using," says Ramhorst.

Pacesetters close the workflow gap

1. **Explore and implement AI initiatives across a wide range of departmental workflows**
   62% of Pacesetters vs. 6% of others
2. **Automate and optimize workflows with AI**
   58% of Pacesetters vs. 21% of others
3. **Streamline and integrate workflows across business functions**
   56% of Pacesetters vs. 4% of others
4. **Replace fragmented legacy systems with an integrated platform**
   50% of Pacesetters vs. 8% of others
5. **Use agentic AI to create completely new workflows that were not possible before**
   37% of Pacesetters vs. 1% of others
6. **Use agentic AI to create autonomous and multi-step workflows**
   34% of Pacesetters vs. 3% of others

LESSON 4

Build the workforce your AI strategy demands.

Pacesetters understand that AI transformation is not possible without the right talent and skills. That is why they focus on assessing, developing, and hiring in AI skills. "Pacesetters double down on re-skilling their workforce, giving people the time and resources to take the courses and get the certifications," says Morris.

Pacesetters don't discriminate. "They realize that everyone within the organization from the board on down must learn to use AI," says Ramhorst. "AI will be critical to how people work in the future. Tech companies need to ensure that everybody, not just the early adopters within the organization, is on the same page."

Pacesetters rewrite organization charts

Pacesetters redesign work for an AI-enabled workforce. They build organizational approaches that define how people and AI agents will work together. Instead of assuming teams will adapt on their own, they create talent pipelines, training structures, and workflows suited to a hybrid operating model.

"I see AI agents as part of the hierarchy and organization charts," says Morris. "However, Pacesetters make it clear that while they need AI agents to enable growth, they will be doing routine jobs, while people do the harder, higher value work."

Pacesetters invest in their people

1. **Develop strategies to attract, hire, and retain AI talent**
   59% of Pacesetters vs. 9% of others
2. **Set new organizational approach for managing AI agents and humans together**
   58% of Pacesetters vs. 5% of others
3. **Develop talent development programs with universities and other partners**
   55% of Pacesetters vs. 6% of others
4. **Assess AI skills across the organization**
   55% of Pacesetters vs. 14% of others
5. **Provide tailored, ongoing AI training and upskilling programs**
   52% of Pacesetters vs. 3% of others

LESSON 5

Accelerate governance. Close the chaos gap.

In the race to scale AI, Pacesetters use governance as an accelerator, not a brake. They are far more likely to embed trust into AI processes from the start, create teams to provide guidance and control, and stay on top of regulations. That lets them move faster with fewer surprises.

This is crucial in technology, where many firms are both heavy users of AI and providers of AI-enabled products and services. "In technology, governance is particularly critical, where it needs to be balanced with the pace of change in the industry," says Hess. "AI oversight committees will be key to support and guide the organization, since speed without governance can quickly lead to problems."

How Pacesetters keep AI on track

According to Morris, Pacesetters rely on four quadrants of AI governance to move fast without losing control. **(1) Value:** Every AI initiative must have clear ROI. **(2) Uniqueness:** They avoid redundant agents and overlapping use cases. **(3) Compliance:** They track agents against policies and regulations and act when something drifts. **(4) Production readiness:** Nothing goes live until it meets defined conditions.

Ramhorst warns that without this discipline, "regulation can become a barrier to AI adoption for tech companies, particularly in Europe, where risk-averse organizations may stop moving to avoid doing something wrong." Pacesetters flip that script: by investing early in transparency, oversight, and regulatory engagement, they turn governance into a competitive advantage that lets them scale AI with speed and confidence.

Pacesetters prioritize governance

1. **Embed trust and transparency into AI processes**
   67% of Pacesetters vs. 14% of others
2. **Create an AI center of excellence to provide guidance, standards, and support and ensure responsible use of AI**
   61% of Pacesetters vs. 21% of others
3. **Establish an AI oversight committee to guide, monitor, and control AI use**
   60% of Pacesetters vs. 8% of others
4. **Create processes to continuously monitor and prepare for regulations**
   60% of Pacesetters vs. 13% of others
5. **Communicate regularly with regulators to stay abreast of evolving AI standards**
   59% of Pacesetters vs. 13% of others

Your AI roadmap

Experimenter
Testing AI approaches and running pilots in individual departments. Building the strategy and plans needed to scale.

19%
Surveyed

Scaler
Moving from plans to implementation. Building IT foundations and cross-functional collaboration to deploy AI across the organization. Most are still working through siloed systems and fragmented workflows.

56%
Surveyed

PACESETTER

Advancer
Strong foundations in place. Scaling AI enterprise-wide and beginning to optimize with agentic AI, with full business reinvention still ahead.

20%
Surveyed

PACESETTER

Transformer
Reinventing business models, products, and services through widescale AI execution. AI is central to strategy, operations, and value creation.

5%
Surveyed

Build your roadmap. Accelerate AI maturity.

AI maturity is a journey that is not strictly linear. Technology firms move forward as their foundations strengthen and sometimes step back as technology, regulation, and business priorities shift. What matters is knowing where you are, because your next move depends on it.

Plan your next move

Experimenter

For tech companies in the Experimenter stage, the challenge is to move on from piloting to scaling.

"Pick a lane and hit the gas," urges Hess. "Companies that don't won't last much longer."

Morris suggests that "data anxiety" may be holding back many experimenters. "You don't have to fix all the data at once, start with each use case and push it to production. Having 80% confidence is enough. " He also suggests that lack of support and confidence in the C-suite is holding back some companies.

Part of the process is having a vision and goals, says Ramhorst. "Experimenters need to get a clear understanding of what they want to improve," he says. "If you are not sure what you want to achieve, it's difficult to move forward."

Scaler

Technology companies at the Scaler stage need to overcome siloes and fragmented systems to progress.

"Many companies at this stage lack a cross-functional enterprise strategy for AI," says Morris. "They don't have the governance and operational rigor to go further."

To make that leap, Hess argues, technology Scalers need to go all-in on change management. "You need the freedom to rethink yourselves as an organization and the products you offer around AI," he says. "You need to reason your way through it, scale use cases to see what works and what doesn't."

He urges tech companies to take the plunge because they must if they want to survive. "AI will completely reshape the landscape for the technology industry," Hess says.

Pacesetter

The big challenge for Pacesetters is not to lose momentum.

"Don't get too comfortable and complacent," says Hess. "It's important to maintain a startup mindset going forward and don't let yourselves become legacy businesses."

Morris worries that Pacesetters may not take the final step toward an enterprise AI platform and will try to move forward with the wrong tools. "They need to ask themselves what problem they are trying to solve, and what AI tools in our toolkit will solve it best, at the lowest cost," he says.

Ramhorst, like Hess, urges Pacesetters to keep going. "You should never rest and feel that you have reached the peak," he says. "There's always another mountain peak behind that one."

Put AI to work for technology

The research is clear on what separates leaders from the rest — and the gap has a dollar value. Tech Pacesetters are generating 168% ROI on AI today, with 199% projected in two years. They're not doing it by adding more tools. They're doing it by redesigning how work moves across their organizations.

The ServiceNow Autonomous Workforce ROI Calculator lets you model what that shift could mean for yours.

Calculate ROI

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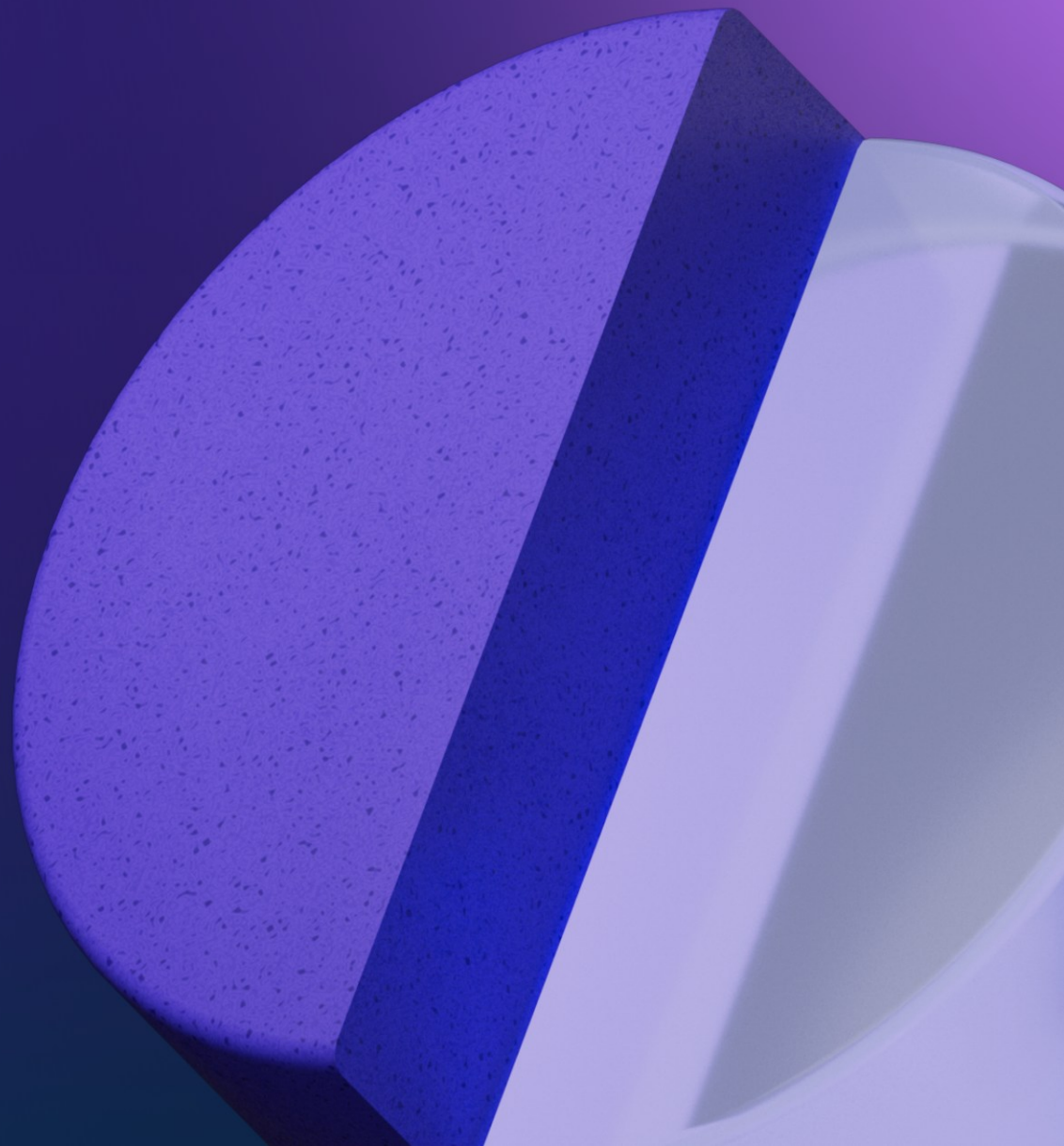
Appendix



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Technology report research background

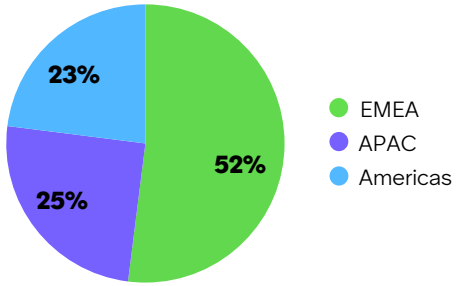
This report is drawn from ServiceNow's third annual Enterprise AI Maturity Index, which included a survey of 4,500 executives and 2,000 employees across 19 countries and 12 industries.

The analysis is based on responses from 425 technology executives and 317 technology employees. The executives divided roughly evenly among hardware, software, service and integrated technology providers.

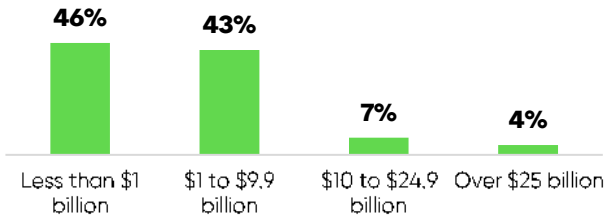
How technology stacks up

Tech companies are among the most advanced in AI, incorporating it into all they do. While some smaller tech firms are AI native, large tech firms generally are further ahead. For example, tech firms with over $25 billion in revenue scored 63.7, compared with 51.1 for firms with under $1 billion in revenue. The scale of these larger companies gives them the capital, data, talent, and governance capacity to move quickly from pilots to enterprise-wide deployment and continuous improvement.

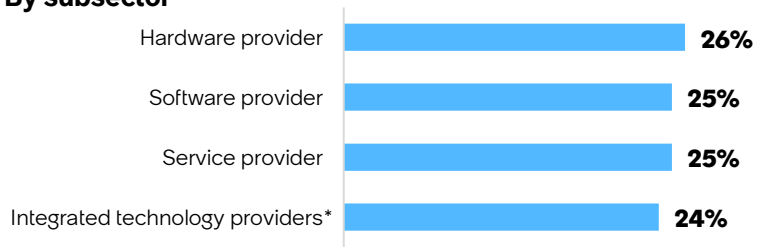
By region



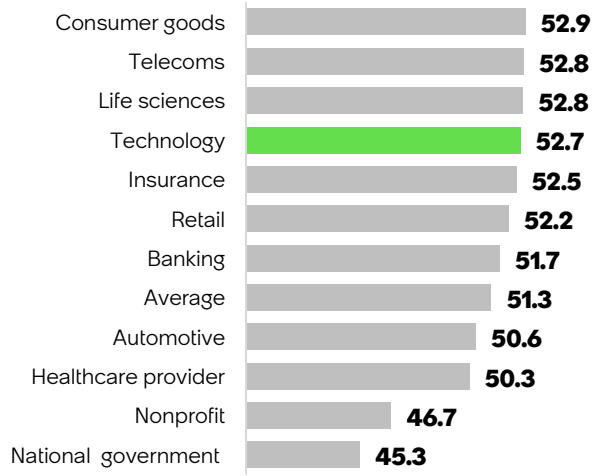
By revenue size



By subsector



Maturity score vs other sectors



*Integrated technology providers incorporate the businesses of two or more of the other three subsectors. For this reason, only three subsectors are included in the top use cases.

Enterprise AI maturity index survey demographics

Regions and countries

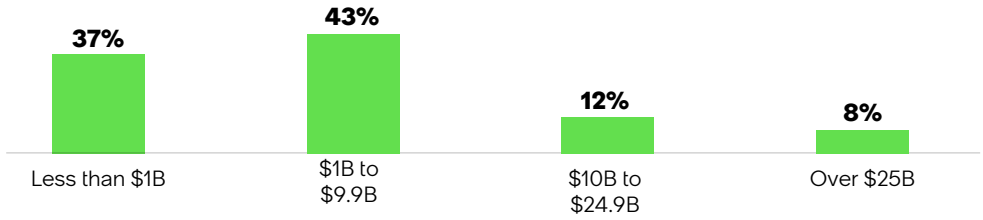
Americas	**1,400**	**825**
Brazil	200	75
Canada	200	150
Mexico	150	75
U.S.	850	525
APAC	**1,400**	**530**
Australia	350	85
India	350	250
Japan	300	100
Singapore	200	60
South Korea	200	35
EMEA	**1,700**	**625**
Belgium	100	35
France	250	85
Germany	250	85
Italy	150	70
Netherlands	150	35
Saudi Arabia	150	15
Spain	150	85
Switzerland	150	35
UAE	100	15
UK	250	185

Industry

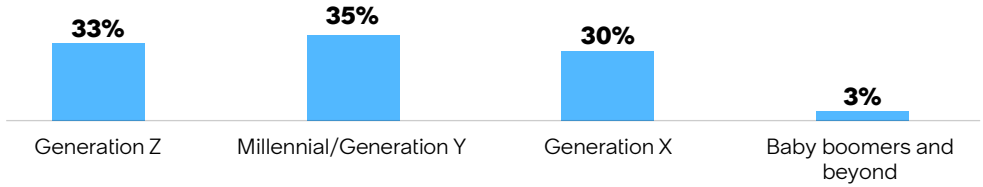
Automotive	325	74
Banking	450	318
Consumer goods	325	100
Government	425	118
Healthcare provider	400	152
Heavy manufacturing	200	86
Insurance	400	107
Life sciences	400	166
Nonprofit	350	202
Retail	400	199
Technology	425	317
Telecommunications	400	161

Respondents ● Executives (4,500) ● Employees (2,000)

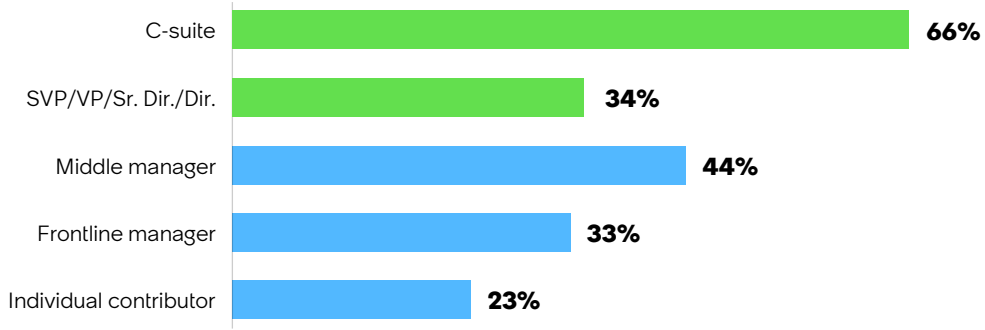
Revenue



Age



Role



AI index methodology

Updated AI Maturity framework

For 2026, we expanded the framework from five to seven pillars and refocused existing pillars to reflect new strategies and solutions.

1. **AI vision, strategy, and leadership:** Expanded to include setting a shared vision for AI transformation beyond efficiency gains and selecting AI projects based on ability to drive strategic outcomes.
2. **Management and culture:** New pillar measuring progress in establishing AI leadership teams, partner ecosystems, innovation centers, and enterprise-wide culture.
3. **AI governance:** Refocused to cover responsible AI use, oversight teams, regulatory compliance, and embedding trust and transparency into AI processes.
4. **Data modernization:** New pillar gauging progress on data quality, security, privacy, and compliance; data integration and standardization; and real-time data capture.
5. **AI-enabled workflows:** Refreshed to include agentic AI creating autonomous, multistep workflows and entirely new workflows not possible before.
6. **Talent and skills:** Updated to address AI's impact on the future of work, including long-term HR planning and managing AI agents and humans together.
7. **Driving value from AI:** Refocused from investment to value creation: new products, services, and business models, with sharper focus on performance metrics.

Calculating pillar scores

Each of the pillars was supported by a question asking respondents to gauge progress across sub-pillars, scored as follows:

0 = No progress

1 = Evaluating and building support

2 = Testing and developing plans

3 = Finalizing plans and starting implementation

4 = Scaling widely across the organization

5 = Fully implemented with significant results

Each pillar score was calculated by averaging its sub-pillar scores (range: 0 to 5).

Determining overall index score

All pillars were weighted equally. The overall score was calculated by averaging the pillar scores, dividing by 5, and multiplying by 100 to produce a 0 to 100 scale. Respondents were assigned to one of five categories based on overall score:

Evaluator: 1 to 19

Experimenter: 20 to 39

Scaler: 40 to 59

Advancer: 60 to 79

Transformer: 80 to 100

PACESETTERS

Less than 1% were Evaluators, so it was not included in the AI roadmap section.

Identifying Transformers

Respondents scoring 80 or higher were classified as Transformers only if they agreed with two or more statements about how their organization has driven strategic transformation through AI. Those scoring 80 or higher but agreeing with fewer than two statements were classified as Advancers.

ServiceNow (NYSE: NOW) is the AI control tower for business reinvention. The ServiceNow AI Platform integrates with any cloud, any model, and any data source to orchestrate how work flows across the enterprise. By unifying legacy systems, departmental tools, cloud applications, and AI agents, ServiceNow provides a single pane of glass that connects intelligence to execution across every corner of business. With more than 75 billion workflows running on the platform each year, ServiceNow helps organizations turn fragmented operations into coordinated, autonomous workflows that deliver measurable results.

Learn how ServiceNow puts AI to work for people at servicenow.com.

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