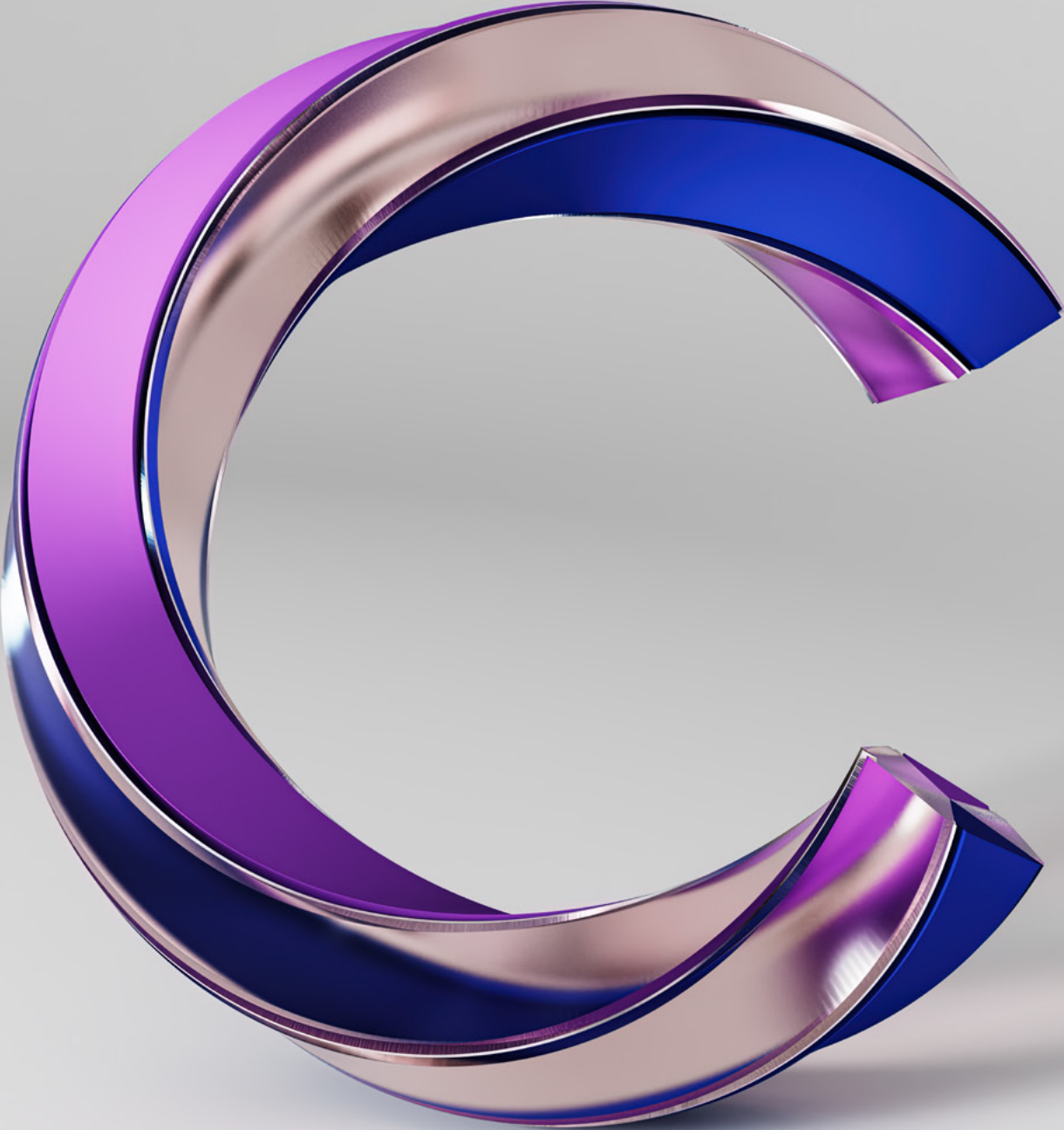


Global C-suite Series

2026 CEO Study



Rewiring the C-suite

The fast track to 2030



About the study

This study is the 15th IBM Institute for Business Value (IBM IBV) CEO Study. For the 2026 CEO Study, the IBM IBV, in cooperation with Oxford Economics, surveyed 2,000 CEOs from 33 geographies and 21 industries between February and April 2026. In addition to survey responses, insights were drawn from numerous client conversations, including a series of CEO interviews conducted between October 2025 and April 2026. These conversations focused on how leaders are preparing their organizations to thrive in the future, touching on topics including strategy and leadership, business models, technology, talent and culture, governance, regulation, industry disruption, partners and ecosystems, and the unique role of CEOs.

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Foreword

Leading at the speed of AI



Gary Cohn
Vice Chairman, IBM

Artificial intelligence is not another cycle of change. It is a structural shift in how organizations think, decide, and compete.

Every era has underestimated the leaders who moved early. From industrialization to digitization, the winners were not those who waited for certainty, but those who recognized inflection points and acted with intent. AI is such a moment—one that rewards decisiveness and penalizes hesitation.

The CEO's role has always been to lead through disruption. What AI changes is the velocity and consequence of leadership. Enterprises that succeed will operate AI-first—not as a layer of technology, but as a new operating model. Decision cycles will compress. Boundaries between functions will dissolve. Advantage will accrue to those who can learn, adapt, and execute faster than their competitors.

AI's first dividend is productivity—freeing time, talent, and capital once consumed by friction. But productivity alone does not create advantage. The real differentiator is how leaders redeploy that capacity. Growth will favor CEOs who reinvest aggressively, reimagine roles and workflows, and channel AI-driven insight toward new products, new markets, and new sources of value.

This is where leadership becomes catalytic. CEOs are no longer just stewards of performance; they are architects of intelligence. As AI expands what organizations can see and know, leaders must decide what matters, align the enterprise around it, and move with speed and coherence. Strategy becomes continuous. Execution becomes inseparable from insight.

This is not reinvention for its own sake. It is evolution with purpose. AI does not replace sound leadership—it raises the standard. The shift is from managing activity to engineering outcomes; from protecting legacy advantage to building the next one. Organizations that embrace this mindset early will not just adopt AI—they will compound its impact over time.

History rewards leaders who recognize when the environment has changed and respond with focus, discipline, and intent. AI is not a distant promise. It is here, it is moving fast, and it is redefining what effective leadership looks like. The future will belong to those prepared to lead at its speed.

Introduction

AI is reshaping the C-suite

Today, 69% of CEOs say AI is already changing the aspects of their business they consider core. By 2030, CEO agendas will reflect these new priorities, with a sharper focus on speed, intelligence, and reinvention.

AI agents might lead morning stand-ups, reporting on overnight market shifts and suggesting strategic pivots. Afternoons may include innovation labs as routine as budget reviews once were. The C-suite could focus less on AI-powered productivity gains and more on business model transformation, led by executives who operate as a united front, not in siloed functions.

That's why 2026 is the year CEOs must rewire the C-suite—redesigning how decisions are made, how authority is distributed, and how AI reshapes influence—while preserving the decisiveness and clarity enterprises need to move fast. Getting there takes proactive leadership. CEOs will need to work with their C-suite leaders to build execution mechanisms, incentives, and operating models all focused on driving these outcomes.

That's the clear message of new proprietary data gathered by the IBM Institute for Business Value (IBM IBV). Our research shows that CEOs who have the greatest success with AI are actively rethinking cross-functional collaboration and embedding AI across end-to-end workflows. They're building organizations designed to thrive in uncertainty, where productive debate sharpens strategy and smart risk-taking is rewarded.

“Trying to take AI tools and squeeze them into the existing organization is extremely likely to be the wrong approach.”

Jacek Olczak

Group CEO, Philip Morris International (PMI), Switzerland

The 2026 CEO Study’s data, gathered in partnership with Oxford Economics, builds on our study, *The enterprise in 2030*, which identifies five predictions for the future of the organization (see “A playbook for AI-first success” on page 7).¹ This study’s analysis, informed by our 2030 predictions, reveals five plays that CEOs must make to lead in an AI-first landscape (see “Research methodology” on page 44).

- 1 Rethink the C-suite for speed and clarity.
- 2 Create an AI-agent flywheel.
- 3 Customize your AI mix, not just your AI models.
- 4 Orchestrate intelligence—human and artificial.
- 5 Expect unpredictable futures.

“Our foundation—creativity, authenticity, emotional connection—does not change. AI’s role is to strengthen and enable how we deliver on that foundation: helping teams generate ideas, refine them, and bring them to life more effectively.”

Patrice Louvet

President and CEO, Ralph Lauren Corporation, US

The following sections outline how each of these moves enables CEOs to execute more successfully on strategy, deliver more consistently on business cases, and scale AI enterprise wide (see Figure 1). Across the board, mindset matters as much as technology, if not more. The result is better, faster outcomes today—and a framework for success tomorrow.

FIGURE 1

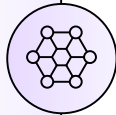
AI-first plays deliver real returns

AI-first CEOs, who agree with the five statements below, have seen 17% higher revenue growth

The CEO plays

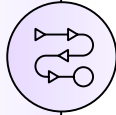
The mindset

1 Rethink
the C-suite



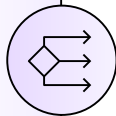
We must rethink cross-functional collaboration in our organization to accelerate our pace of business.

2 Create an
AI-agent
flywheel



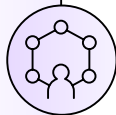
We are actively embedding AI across multiple workflows to optimize end-to-end efficiency and effectiveness.

3 Customize
your AI mix



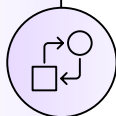
We prioritize AI use cases more around long-term differentiation than short-term ROI.

4 Orchestrate
intelligence



Succeeding with AI depends more on people's adoption than the technology itself.

5 Expect
unpredictable
futures





We have a team in place today assessing the impact of quantum on our industry.

+17%

Revenue growth
compared to all other
organizations for the
past three years

A playbook for AI-first success

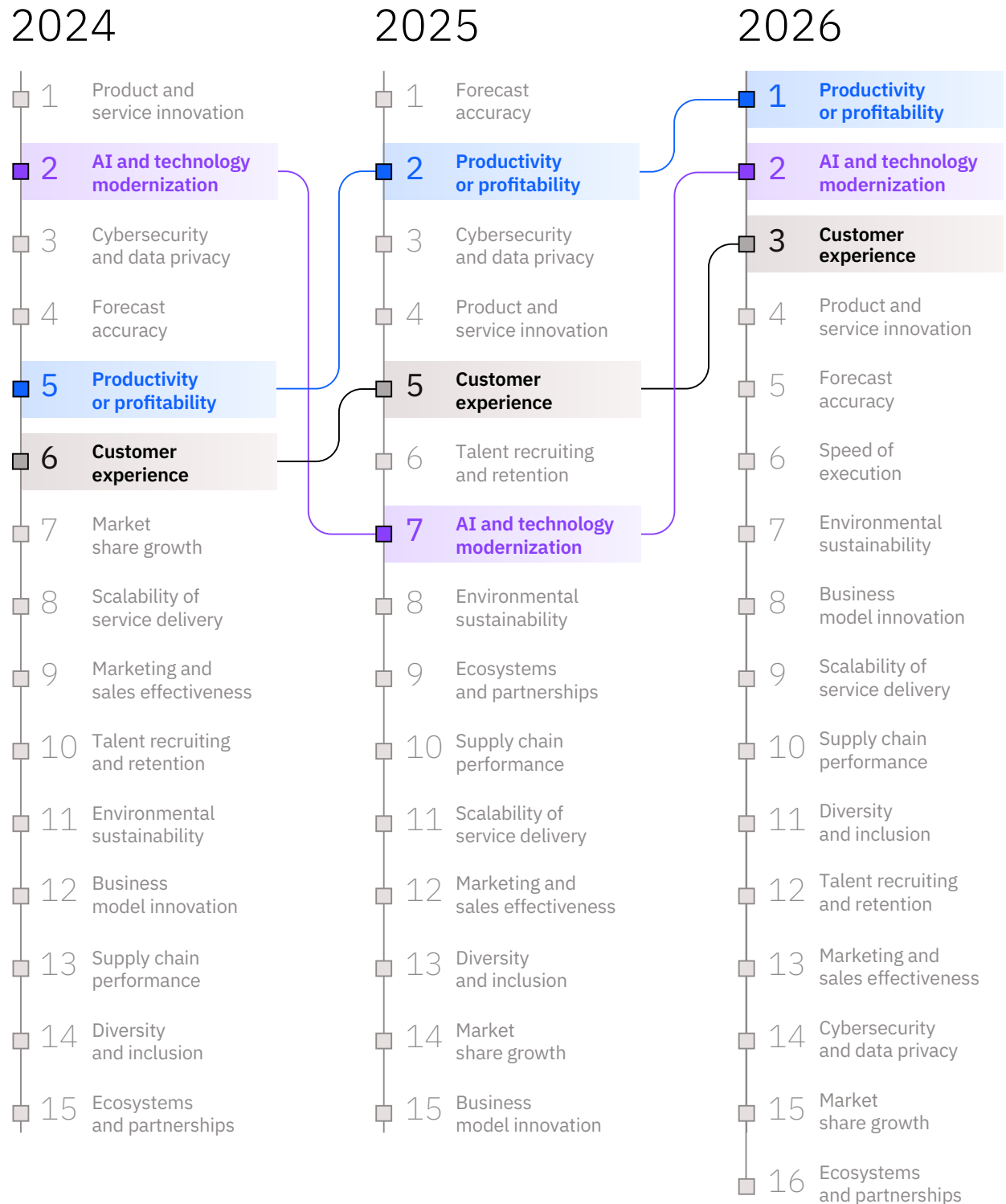
In *The enterprise in 2030*, IBM IBV analysis unveiled five predictions that will define the business landscape of the future.² Our 2026 CEO Study identifies the plays CEOs must make now to turn those predictions into payoffs by the end of the decade.

	 <p>The prediction <i>What to expect in 2030</i></p>	 <p>The play → The payoff <i>What CEOs can do today</i> <i>Sources of differentiation</i></p>	
1	Competitive pressure will make big bets non-negotiable.	Rethink the C-suite for speed and clarity.	CEOs who are remaking the C-suite with an AI-first mindset have scaled 10% more AI initiatives enterprise wide.
2	Today's productivity gains will fund tomorrow's transformation.	Create an AI-agent flywheel.	The most future-focused CEOs have scaled 23% more AI initiatives enterprise wide.
3	The best AI will be one-of-a-kind. Your kind.	Customize your AI mix, not just your AI models.	CEOs who systematically incorporate proprietary data and IP into custom AI models and agents expect 13% more of their 2030 revenue to come from products and services not offered today.
4	AI won't do all your thinking for you.	Orchestrate intelligence—human and artificial.	CEOs who actively redesign how teams work together are more than twice as likely to have delivered on their business objectives.
5	Quantum will cause the next seismic shift.	Expect unpredictable futures.	82% of AI-first CEOs are already actively engaging partners in one or more quantum ecosystems to access complementary strengths, reduce risk, and accelerate learning.

The 2026 CEO outlook

Top CEO priorities

What's most important



Note: Speed of execution was added as an option in 2026 to assess the impact of AI-driven acceleration.

The 2026 CEO outlook

Top CEO challenges

What's most difficult

Note: Speed of execution was added as an option in 2026 to assess the impact of AI-driven acceleration.

The 2026 CEO outlook

CEO priorities and challenges by industry

CEOs across industries are largely aligned on what's most important but have diverging views on what's most difficult.



Consumer

Retail and consumer products

Consumer CEOs operate in fragmented markets where consumers increasingly rely on AI to guide choices and decision cycles are compressed, while logistics and supply chains remain volatile. This is forcing companies to sense demand, simulate outcomes, and act in near-real-time. To compete at market speed, CEOs must increase decision authority among commercial, marketing, pricing, and supply chain leaders. In an environment shaped by agent-mediated decisions, organizational friction risks making the enterprise invisible at the exact moment buying decisions are made.

Top priorities

1. Customer experience
2. Product and service innovation
3. Forecast accuracy

Top challenges

1. Productivity or profitability
2. Supply chain performance
3. Scalability of service delivery



Banking

Retail, commercial, and wholesale banking, and financial markets

Banking faces a digital trust paradox: AI and data are now indispensable competitive enablers, even as they magnify regulatory, cyber, and reputational risk. Cybersecurity and data privacy consistently rank as a top concern as CEOs work to transform their organizations. Advantage will depend on precision execution—how well leaders translate insight into secure and differentiated experiences, pricing, and services at scale.

Top priorities

1. Productivity or profitability
2. AI and technology modernization
3. Customer experience

Top challenges

1. Productivity or profitability
2. Business model innovation
3. Cybersecurity and data privacy

The 2026 CEO outlook



Insurance

Insurance is a long-term business where customer retention is key. That makes risk partnership critical—understanding what customers worry about most and matching that risk to the right coverage or service. Future differentiation will depend on striking the right balance between tailoring products and experiences and making core operations more efficient and secure. Human-led, AI-enabled underwriting and operations will also be essential to improve productivity and profitability.

Top priorities

1. Productivity or profitability
2. Customer experience
3. AI and technology modernization

Top challenges

1. Business model innovation
2. Forecast accuracy
3. Cybersecurity and data privacy



Energy and resources

Energy and utilities, chemicals, petroleum, and mining

Energy and resources CEOs are balancing sustainability ambitions, rigorous regulations, and capital-intensive operations on the path to growth. While environmental performance is a rising priority, legacy risk models, long planning cycles, and governance structures limit agility and discourage experimentation. As volatility increases across markets and regulation, sustained improvement depends on execution, specifically the ability to make dynamic tradeoffs in real time using shared data and AI-supported planning.

Top priorities

1. Productivity or profitability
2. Environmental sustainability
3. AI and technology modernization

Top challenges

1. Talent recruiting and retention
2. Productivity or profitability
3. Environmental sustainability



Government

Federal and state/provincial

Government's biggest challenge is the ability to execute at scale amidst constant disruption. Leaders broadly agree on priorities, but workforce shortages, aging systems, fragmented authority, and limited data readiness continue to slow progress. Real transformation will depend on expanding institutional capacity through digital platforms and AI. Done well, this is not only about efficiency. It's about improving decision-making; strengthening resilience; and delivering trusted, mission-critical outcomes at speed and scale.

Top priorities

1. Constituent experience
2. AI and technology modernization
3. Cybersecurity and data privacy

Top challenges

1. Talent recruiting and retention
2. Cybersecurity and data privacy
3. AI and technology modernization

The 2026 CEO outlook



Healthcare

Payer, provider, and life sciences

Healthcare CEOs are operating in tightly regulated, fragmented systems where demand for care continues to outpace available staff. Leaders are committed to improving outcomes and modernizing care, but progress stalls when data is fragmented, decisions are siloed, and workforce shortages limit scale. Long-term performance will depend on bringing clinical and administrative data together so leaders can make earlier, better decisions about utilization, outcomes, and staffing, and expand what works across the system.

Top priorities

1. Productivity or profitability
2. Customer experience
3. Scalability of service delivery

Top challenges

1. Talent recruiting and retention
2. Productivity or profitability
3. Scalability of service delivery



Telecommunications

Telecommunications CEOs operate in concentrated, capital-heavy markets where network investments have outpaced revenue and scale alone no longer converts into margin. Consumer churn and rising enterprise client expectations make experience a top priority. Cybersecurity also sits high on the agenda given telecom's role as critical infrastructure. With AI and technology modernization ranked as a top priority and a top challenge, success depends on untangling operational silos, advancing autonomous network operations, and shifting beyond connectivity to capture enterprise and wholesale growth.

Top priorities

1. Productivity or profitability
2. Customer experience
3. AI and technology modernization

Top challenges

1. Productivity or profitability
2. Cybersecurity and data privacy
3. AI and technology modernization



Manufacturing

Manufacturing, industrial products, auto OEMs and suppliers, aerospace and defense, and electronics

Manufacturing CEOs are pushing for innovation and digital modernization in asset heavy environments shaped by aging systems and operational complexity. Long global supply chains, complex plant networks, and growing software dependence slow decisions, raise costs, and weaken resilience. Future competitiveness will depend on digitally connecting physical operations to improve production planning, quality, and end-to-end logistics coordination at scale.

Top priorities

1. Productivity or profitability
2. AI and technology modernization
3. Product and service innovation

Top challenges

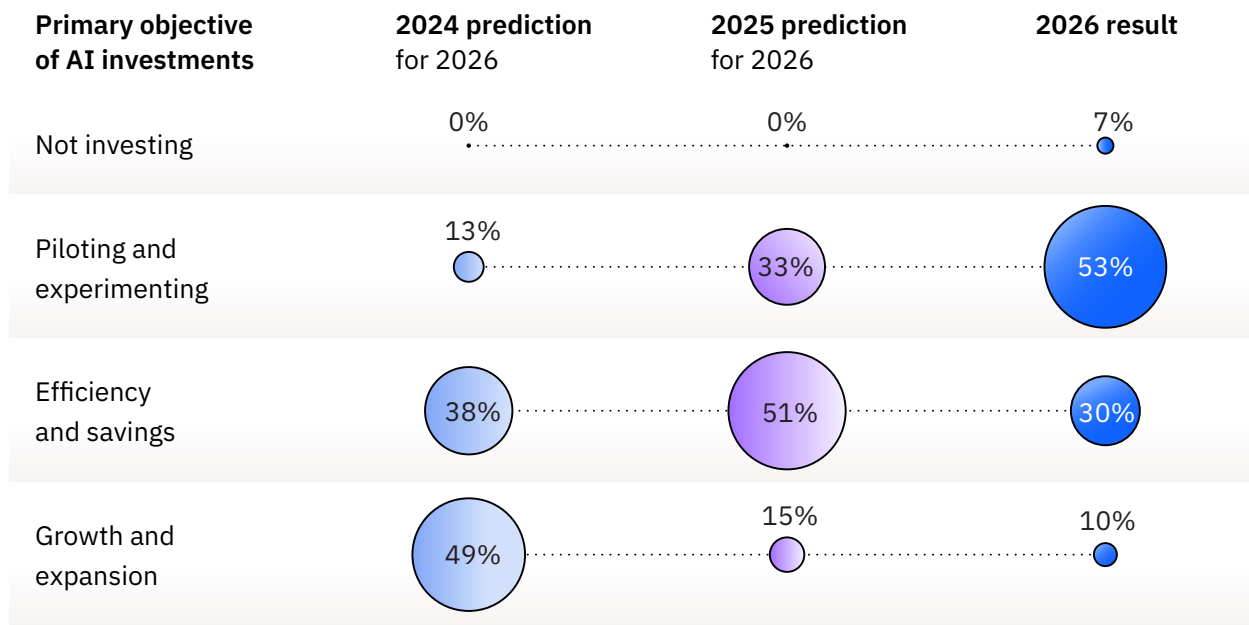
1. Speed of execution
2. Supply chain performance
3. Productivity or profitability

The 2026 CEO outlook

CEO expectations for AI

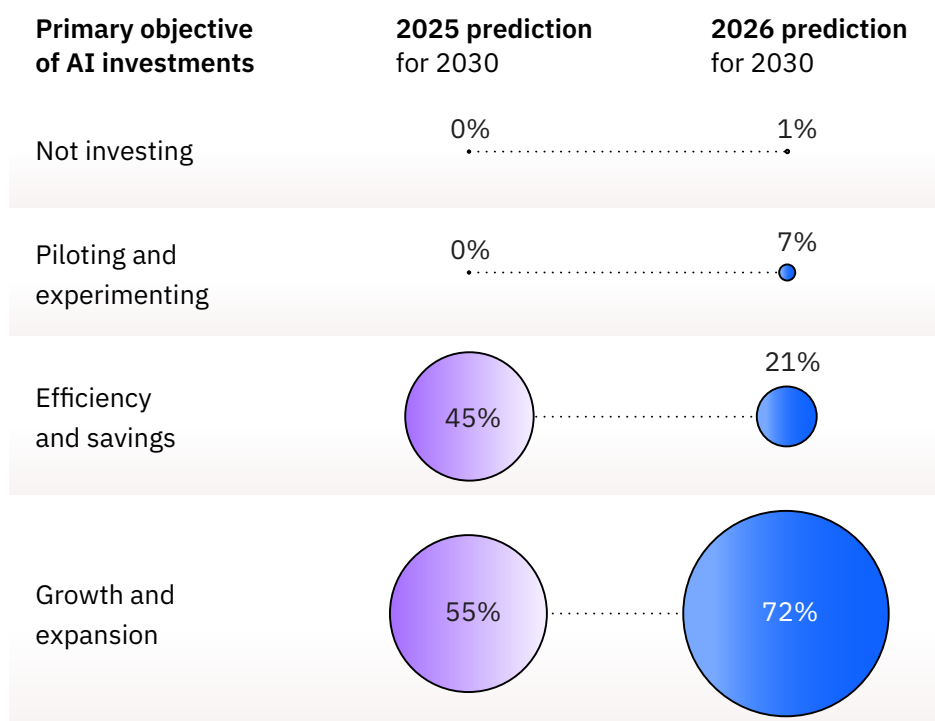
The reality of enterprise AI lags CEO expectations

Percentages show that CEOs were overly optimistic about the pace of AI adoption in 2024, when nearly half expected advanced AI (defined as generative AI) to primarily drive growth by 2026. In 2026, only 10% say advanced AI (defined as agentic AI) is primarily driving growth.



Still, CEOs anticipate rapid progress

Percentages show that CEOs are even more optimistic about the results agentic AI will deliver in 2030, with nearly three-quarters expecting it will primarily drive growth.



The prediction: Competitive pressure will make big bets non-negotiable.

Play #1

Rethink the C-suite for speed and clarity.

The payoff: CEOs who are remaking the C-suite with an AI-first mindset have scaled 10% more AI initiatives enterprise wide.

AI-first transformation starts at the top. CEOs know what to do. Consistency is what sets the best CEOs apart.

The CEOs who are rewiring the C-suite share key characteristics. They've created environments where work flows organically across functions by identifying and directing workflows that need to be transformed. They are actively rethinking who should have authority over what area of the business—then giving those leaders, especially their COOs and business line leaders, the power to change how work is done.

They're also prioritizing AI-first operations by appointing a Chief AI Officer (CAIO) with real authority to orchestrate transformation enterprise wide. And they're creating new roles at every level to take advantage of AI. These leaders have already scaled 10% more AI initiatives enterprise wide than all other organizations—and they're quickly building the foundation needed to extend their lead.

“If we keep optimizing for yesterday, we lose our ability to execute tomorrow. The challenge is to preserve continuity where it is necessary, while simultaneously creating space to adopt new ways of working more quickly.”

Jan Polkerman

CEO, Dutch Tax and Customs Authority IT, Netherlands

This challenge is more evolution than revolution. The fundamentals of leadership haven't changed. The CEO still sets strategy, drives focus, and makes the final call. But the pace and stakes of that evolution are prompting CEOs to intentionally redesign the organization, with the goal of increasing speed, responsiveness, and collaboration.

When AI-first operations are the target, the lines between business units blur. As strategic objectives become increasingly interdependent, C-suite roles are evolving. In fact, the CEOs we surveyed say they expect the influence of every member of the C-suite to increase between today and 2030. In functions such as marketing and HR where AI transformation started first and has impacted many teams and tools already, the expected increase is lower than other tech-centric areas, where AI integration may still be ramping up.

In this context, the role of the CAIO has become critical. In 2026, 76% of organizations have someone in this position, up from just 26% in 2025.³ And 100% of these CEOs expect the influence of CAIOs to increase by 2030. When they have real authority, CAIOs can enable calculated risk-taking across the organization. These leaders typically have a strong background in both data and business strategy, according to our 2025 CAIO Study, which means they can be the voice that sets clear AI transformation targets and provides guidelines that let teams accelerate without spinning out of control.⁴

The Chief Human Resource Officer (CHRO) role will also become more important, with 59% of CEOs saying the CHRO's influence will increase over the next few years. This reflects that, in an AI-first enterprise, people must be managed in a more integrated way. Instead of limiting people management to the realm of HR, it becomes part of virtually every technological, operational, and financial initiative.

As AI continues to play a larger role in managing employees, breaking down the walls between IT and HR will become mission critical. Already, 77% of CEOs say talent and technology leadership roles are converging. Across the board, CEOs expect their C-suite leaders to reinvent themselves as cross-enterprise orchestrators rather than functional specialists.

“Dynamic strategy planning, continual communication, and being honest about why this is happening are extremely important.”

Carsten Egeriis
CEO, Danske Bank, Denmark

“AI needs to be embedded into how we operate. That means integrating it into workflows across design, merchandising, marketing, stores, and operations—not as a separate initiative, but as part of how the business runs.”

Patrice Louvet

President and CEO, Ralph Lauren Corporation, US



“AI reduces layers. Decisions
feel more real, more grounded.”

Pavitra Shankar

Managing Director, Brigade Group, India

The C-suite of 2030 will need to be upskilled to become more AI-native, more technology-centric, more operationally integrated, and more inclined to work across ecosystems. That’s why 85% of CEOs say all functional leaders must become technology experts in their domain.

The real difference won’t be the titles on the org chart but how those leaders work together—and how willing they are to challenge one another to evolve. Speed is the result of productive friction, not the absence of it.

In the rewired C-suite, every leader is expected to own outcomes, not just manage tasks. They’re accountable for identifying opportunities, making bets, and driving change—whether or not it falls neatly within their functional domain. The CEO’s role is to make that accountability explicit: who owns what outcome, who can decide without consensus, and what risks each leader is expected to take.

The rewired C-suite distributes decision-making authority so that leaders closest to the problem can act, within clear guardrails but without waiting for permission. This means designing decision architectures where authority is explicit, accountability is clear, and AI provides real-time intelligence.

85% of CEOs say all functional
leaders must become technology
experts in their domain.

How to make the play

- **Redesign decision rights before touching the org chart.** Identify the handful of enterprise decisions that slow everything else down—AI deployment, pricing moves, capital shifts, partner selection—and assign a single owner, explicit authority, and clear escalation rules. 79% of CEOs are decentralizing decision-making, but you first must help leaders understand *who decides what* so they can accelerate without waiting for consensus.
- **Make every leader accountable for enterprise outcomes.** Tie a meaningful share of C-suite compensation (at least 30%) to shared outcomes—growth, margin, customer trust—not just functional metrics. Break down silo walls that hinder progress, especially between HR and IT. Incentivize joint ownership of workforce redesign, reskilling, and AI deployment to make sure people and technology decisions are made together, measured together, and delivered together.
- **Give AI leadership authority—within limits.** If you have a CAIO, clarify their mandate. If you don't, appoint one now. Give them authority over AI priorities, standards, and funding gates—but not ownership of business results. Their job is to accelerate decisions, scale what works, and stop what doesn't. Line leaders remain accountable for outcomes. That separation is what enables speed without chaos.
- **Reward leaders who make it possible to securely connect AI across the ecosystem.** Ask executives to reevaluate partners based on how easily third-party AI agents can discover, integrate with, and transact through your offerings. Identify shared growth plays, joint use cases, and reciprocal pipeline creation and prioritize the partners best equipped to scale with you.

The prediction: Today's productivity gains will fund tomorrow's transformation.

Play #2

Create an AI-agent flywheel.

The payoff: The most future-focused CEOs have scaled 23% more AI initiatives enterprise wide.

“AI adoption doesn’t progress in a straight line. It often feels slow at first. Then, suddenly, the impact accelerates rapidly.”

Pavitra Shankar

Managing Director, Brigade Group, India

When you have to move fast, there’s no time to wait for perfect information or rely on precedent. You have to think differently, experiment rapidly, and iterate based on what you learn.

Our research reveals organizations that move fastest aren’t just executing better—they’re scaling faster. The most future-focused CEOs have scaled 23% more AI initiatives enterprise wide.⁵ They’re not just prepared for an AI-first future. They’re running AI-first enterprises today.

So, what does it mean to be future-focused? Our analysis shows that it starts with boosting productivity, then reinvesting those gains to fuel innovation with the support of strong governance. This financial flywheel then transforms the business model and operating model alike.

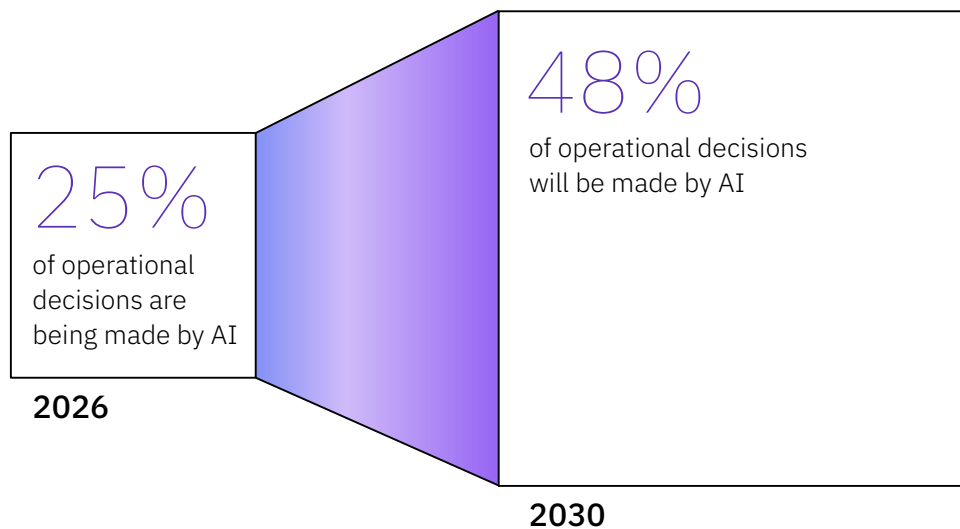
But that isn’t enough on its own. The CEOs who are farthest ahead are also accelerating execution by rapidly deploying AI and embedding it in end-to-end workflows, then using it to make tactical and operational decisions, backed by human judgment.

Today, CEOs in our survey say 25% of operational decisions are made by AI without human intervention. These are often in areas where consistency and guardrails can be codified, such as pricing updates, inventory allocation, shipment rerouting, and automated incident remediation. But by 2030, CEOs expect the share of operational decisions made by AI to nearly double to 48% (see Figure 2). Humans won't disappear from the loop. Instead, their role will shift from making each decision to designing the decision logic, setting guardrails, and stepping in only when exceptions carry material, ethical, or strategic consequences.

In this next wave, AI will increasingly take on operational decisions that demand speed, scale, and continuous optimization—decisions where human intervention simply cannot keep pace. These include real-time demand sensing and inventory optimization across global networks, dynamic workforce scheduling, and automated rerouting when disruptions occur. In fact, a majority of executives are already planning or executing AI-led autonomy in areas like demand forecasting (65%) and inventory optimization (61%), signaling where decision authority is moving first.⁶

FIGURE 2

CEOs expect AI to make nearly half of operational decisions by 2030



The confidence CEOs have in AI agents is growing, with 64% of CEOs saying they're comfortable making major strategic decisions based on AI-generated input. This reflects a significant mindset shift from 2025, when 62% of CEOs said generative AI was still too risky for them to pursue for their core business functions.⁷

Of course, there are plenty of areas where AI agents shouldn't be making decisions, such as regulatory filings, material disclosures, and sensitive legal judgments. The goal isn't to replace executive judgment—it's to scale it, with humans orchestrating and auditing AI that operates inside clear guardrails.

How to make the play

- **Focus on decision points—not use cases.** Identify a small set of repeatable, high-volume decisions where consistency matters more than judgment—pricing updates, inventory allocation, routing, incident remediation—and deploy AI agents there first. Shift humans from approving every decision to handling exceptions. Measure success by decision quality *and* velocity.
- **Lead in a learning environment.** Review AI-led decisions based on what they revealed, not whether the outcome was flawless. Set clear exit criteria upfront—time-to-value, decision quality, and sunset conditions—and normalize stopping low-value automation early so capital and talent can move to what scales. 83% of CEOs say AI success depends more on people’s adoption than technology, so creating an environment where people are excited to think creatively and iterate is essential to spur behavior change.
- **Lock in reinvestment before the gains arrive.** Before the next budget cycle closes, agree on a fixed reinvestment rate for AI-driven productivity gains (typically 60% to 80%) and commit to funding faster cycles of experimentation and scale. Stop incremental efficiency plays that don’t unlock new capabilities.
- **Expand AI autonomy deliberately.** Increase AI decision authority only where guardrails are explicit, auditability is proven, and accountability sits with a named business leader. Let AI execute where consistency can be codified, let humans orchestrate and audit, and grow confidence through evidence.

“With the new AI tools at our disposal, identifying market opportunities is something that can be done more efficiently and effectively. We can identify market trends and create new products and businesses earlier in the lifecycle and ultimately deploy capital faster.”

Corbin Wallace
CEO, Trevi, US

“It’s not the technology
that is the limiting factor.
We are the limiting factor.”

Jacek Olczak

Group CEO, Philip Morris International (PMI), Switzerland

Case study

Dahl accelerates innovation with AI-powered operations⁸

Saint-Gobain, a global leader in sustainable construction, relies on its subsidiary Dahl to deliver high-performance solutions across building markets. Dahl's warehouse was operating at 140% capacity, causing inefficiencies, delays, and rising costs. "This situation was not sustainable," says Roger Sundberg, Development and Operations Specialist. Executives were concerned about customer satisfaction and scalability, prompting urgent action.

To support growth, Dahl launched a modernization initiative to expand warehousing, streamline logistics, and rebuild core IT infrastructure. The initiative also included a full digital infrastructure overhaul and a new e-commerce site to ensure seamless customer experiences across all channels.

The transformation unified multiple brands under Dahl and introduced automation testing in the new warehouse. "The facility was purpose-built to achieve 85% to 90% automation per order line," says Sundberg. "Initial testing shows promising results—reduced manual processes, increased throughput—and we're validating performance under real-world conditions."

Smart alerts and an AI-based dashboard enabled proactive monitoring of all applications in a single, color-coded view. "We can now visualize everything better," says Sundberg. Dahl also uses smart alerts to monitor the entire application chain, including its API gateway. By analyzing error patterns over a 10-minute interval, they provide early warnings when anomalies occur, helping the team act before issues escalate.

Unlike traditional monitoring that focuses on isolated resources and requires complex configurations, the new solution automatically correlates data across services to trigger meaningful events. Combined with open-source visualization tools and telemetry, this approach gives Dahl full-stack observability and proactive control over its critical workflows. "Now we see the complete application portfolio, with live data flow. If something turns red or yellow, we can immediately identify and address the potential issue before it affects customer response time." This strengthened Dahl's DevOps capabilities, ensuring application performance and code quality before going live.

Following the transformation, Dahl achieved faster order processing and delivery, supported by a centralized logistics strategy and 24x7 unmanned stores across Sweden. Its new solutions enabled proactive issue resolution and helped consolidate monitoring from 10 solutions to four, increasing observability and reliability.

New incident remediation capabilities accelerated the launch of Dahl's new e-commerce site by four months, delivering 100% ROI within weeks. Response times dropped from five seconds to under two milliseconds, boosting customer satisfaction and purchases. Automation in order fulfillment rose from 60% to between 80% and 90%, with 10 of 12 tests successfully running warehouse automations at 120% of peak order volume.

These outcomes have not only improved operational efficiency and customer satisfaction—they've also strengthened Dahl's competitive edge in Sweden's fast-moving logistics sector, positioning the company as a benchmark for innovation and responsiveness.

The prediction: The best AI will be one-of-a-kind. Your kind.

Play #3

Customize your AI mix, not just your AI models.

The payoff: CEOs who systematically incorporate proprietary data and IP into custom AI models and agents expect 13% more of their 2030 revenue to come from products and services not offered today.

Nearly 80% of executives expect AI to drive significant revenue by 2030—but only 24% know where it’s going to come from. In this environment, competitive advantage will belong to those with the clearest vision.⁹

Our analysis shows the CEOs who have defined a tailored AI vision are more optimistic about product and service innovation. CEOs who systematically incorporate proprietary data and IP into custom AI models and agents expect 13% more of their 2030 revenue to come from products and services not offered today.

So what differentiates a successful AI vision? In *The enterprise in 2030*, we found it’s not a single type of model that does the most to drive performance. It’s the right mix. The organizations that most successfully scale AI across workflows use smaller, tailored models or a combination of custom and foundation models. They expect 24% greater productivity gains, 55% higher operating profit margin improvements, and twice the reduction in process cycle times by 2030 compared to those relying predominantly on large pre-trained models.¹⁰

“We use the right model for the right task. Many high-value use cases are better served by specialized, smaller models embedded directly in workflows.”

Andrew Anagnost

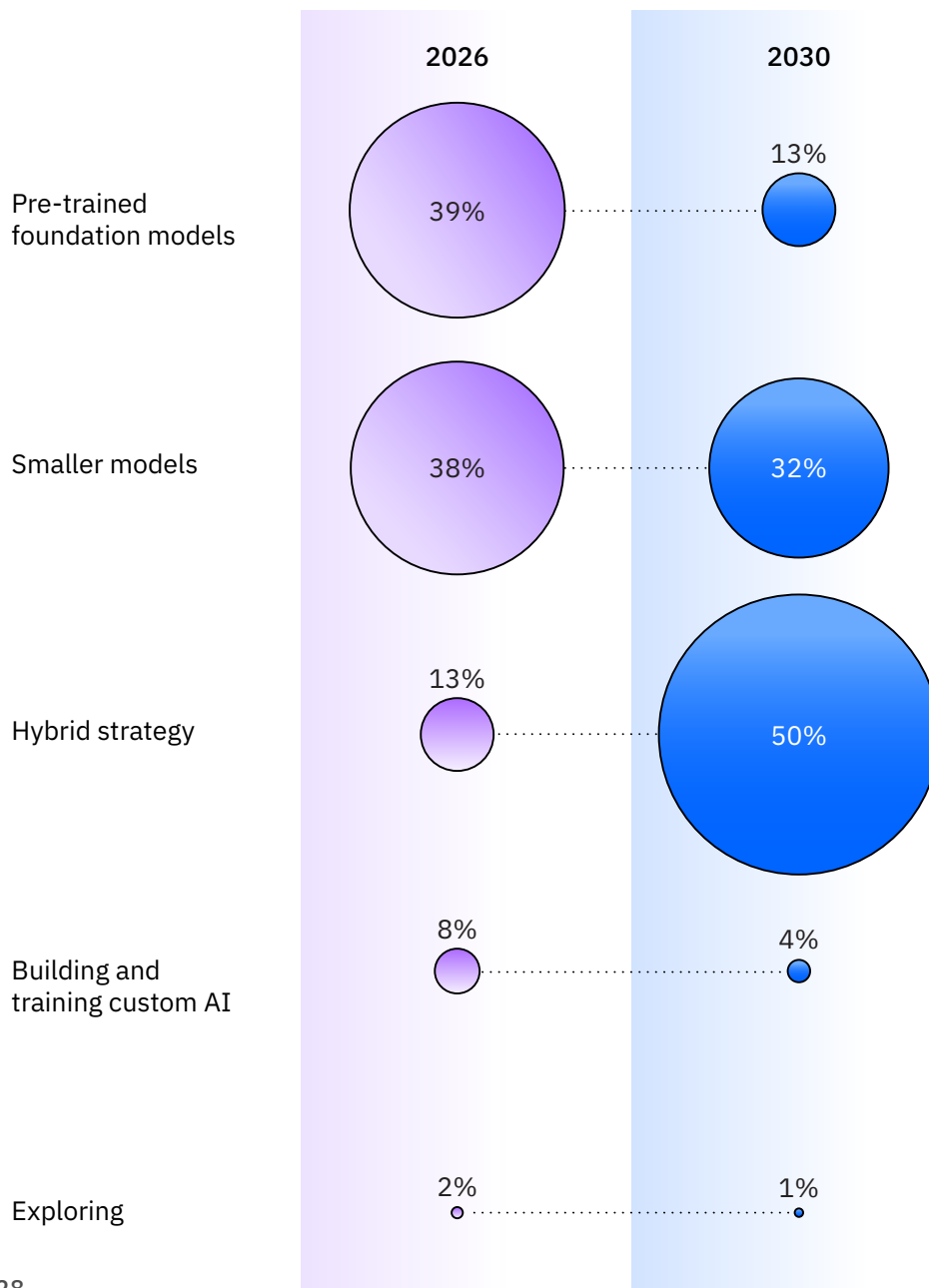
President and CEO, Autodesk, US

Our 2026 CEO data confirms that trend. While 39% of CEOs say their organization primarily uses pre-trained foundation models today, by 2030 that is expected to drop to just 13%. Half of CEOs say they are shifting to a hybrid strategy that combines custom models, foundation models, and smaller specialized models based on specific business requirements (see Figure 3). CEOs also want the ability to change AI models as conditions shift. 83% of all CEOs—and 97% of AI-first CEOs—say developing and maintaining AI sovereignty is essential to their business strategy.

FIGURE 3

Half of organizations will be using a hybrid AI model strategy by 2030

Percentages reflect CEOs who selected each option as their primary AI model strategy in 2026 and 2030



“AI has moved from the infrastructure layer, largely invisible, to the surface of how we work and how we serve customers.”

David Risher

CEO, Lyft, US

This means defining a multi-model strategy that combines pre-trained large language models (LLMs) for reasoning with task-specific small language models (SLMs) and ultra-specialized language models (ULMs) for speed and precision—all fine-tuned on proprietary datasets. It means creating AI agents that embody the organization’s culture, values, and competitive edge, delivering outcomes no competitor can reproduce.

This last point is worth emphasizing, because differentiation doesn’t scale unless people buy in. The CEO must give the organization a clear vision to follow—one that explains why customization matters, where it delivers the most value, and how it separates the organization from competitors. Without that clarity, teams default to generic solutions because they’re easier, faster, and don’t require debate.

“We see AI fluency as a core capability across the company. Our focus is on practical application—helping teams use AI in their day-to-day work across stores, distribution centers, and offices.”

Patrice Louvet

President and CEO, Ralph Lauren Corporation, US

How to make the play

- **Draw a hard line between commodity AI and competitive AI.** 63% of CEOs agree that their competitive advantage in 2030 will come primarily from the sophistication of their AI models. To protect that edge, answer three questions with your CIO/CTO and business leaders: What makes us impossible to replicate? What proprietary data, IP, or business logic do we own? Where can ultra-specialized AI outperform generic models? Use the answers to classify AI investments into what you buy versus what you must tailor or build—and make that distinction the filter for every funding decision.
- **Tailor your AI portfolio.** Define where foundation models deliver general reasoning, where smaller task-specific models drive speed and efficiency, and where ultra-specialized models create differentiation. Avoid defaulting to the largest model simply because it's available. Fit matters as much as scale. Stay on top of the latest AI advancements so you can make informed moves when the landscape shifts. Require your C-suite to do the same.
- **Make your agents unmistakably yours.** Require AI agents to reflect how your organization competes—your decision rules, risk tolerances, brand values and culture, and operating philosophy. Do this by codifying what the business will and won't optimize for, defining escalation rules for judgment calls, and embedding approved decision criteria into agent workflows. Require senior leaders to sign off on these principles and test agents against real scenarios to help ensure they behave the way the organization would.
- **Assign business ownership for differentiated AI.** Name a business leader for every competitive AI investment and hold them accountable for adoption, outcomes, and value realization. Make ownership explicit by tying the initiative to a revenue, margin, or growth metric and reviewing progress in the same forum as other strategic bets. If usage stalls or value doesn't materialize, require the owner to course-correct or stop the investment.

“If you only rely on software features as your differentiator, you're in trouble, because that's replicable.”

Pablo T. Rivero

CEO, Resy; SVP, Global Dining, American Express, US

Case study

Unipol accelerates operations with tailored AI¹¹

To avoid stagnation in a rapidly evolving industry, Unipol Assicurazioni S.p.A., a leading insurance provider in Italy, needed a more customized approach to AI. With a focus on enterprise-wide adoption, the company developed next automation monitoring insurance (NAMI), an AI-powered automation platform featuring generative AI use cases tailored to Unipol's operational needs.

The platform uses a multi-model approach to match models to the right task. Natural language interfaces are integrated with tools for instant insights and streamlined workflow. And the company's operations have seen an immediate impact.

In two months, NAMI analyzed over 800 system events, autonomously resolving many and escalating only 538. Previously, Unipol's control room monitored just 26% of events in near real time. Since June 2025, NAMI has taken over 100%, freeing technical teams to focus on higher-value, strategic initiatives. Event response times dropped from 20 minutes to just 90 seconds, accelerating resolution and reducing disruption.

Operational efficiency has significantly improved, with time for accounting and claims processes reduced from 21 to 18 hours, while incident handling time has dropped by 90%, enabling technical teams to analyze data more quickly. By integrating more than a dozen monitoring systems into a unified data lake, NAMI fostered real-time monitoring, predictive analytics and automated reporting, enhancing decision-making. Looking ahead, Unipol plans to expand NAMI with full event automation, AI-driven process transformation, and hybrid cloud support.


The prediction: AI won't do all your thinking for you.

Play #4

Orchestrate intelligence— human and artificial.

The payoff: CEOs who actively redesign how teams work together are more than twice as likely to have delivered on their business objectives.





Today, AI augments people. By 2030, people will augment AI. The biggest shift won't be structural—it will be cultural.

The leaders who see this shift coming know that technology alone won't deliver AI-first results. The real unlock comes from reimagining how humans and machines collaborate to achieve outcomes neither could deliver alone.

Many organizations are still focused on using AI to support traditional ways of working, but our analysis shows that those who are proactively rethinking how people and technology collaborate are already seeing better results. Of the CEOs we surveyed, those that are actively redesigning how cross-functional teams work together are more than twice as likely to have delivered on their business objectives, meaning they've realized the full benefits outlined in their business cases.

When AI handles specialized tasks with speed and precision, the human advantage shifts to those who can see patterns across functions, ask questions AI doesn't know to ask, and integrate machine intelligence with strategic context. Tactically, that means breaking down traditional boundaries between business and technology—boundaries that 77% of CEOs say have become obsolete.

“It's not laying AI on top of your existing tools and services. It's reimagining the entire process.”

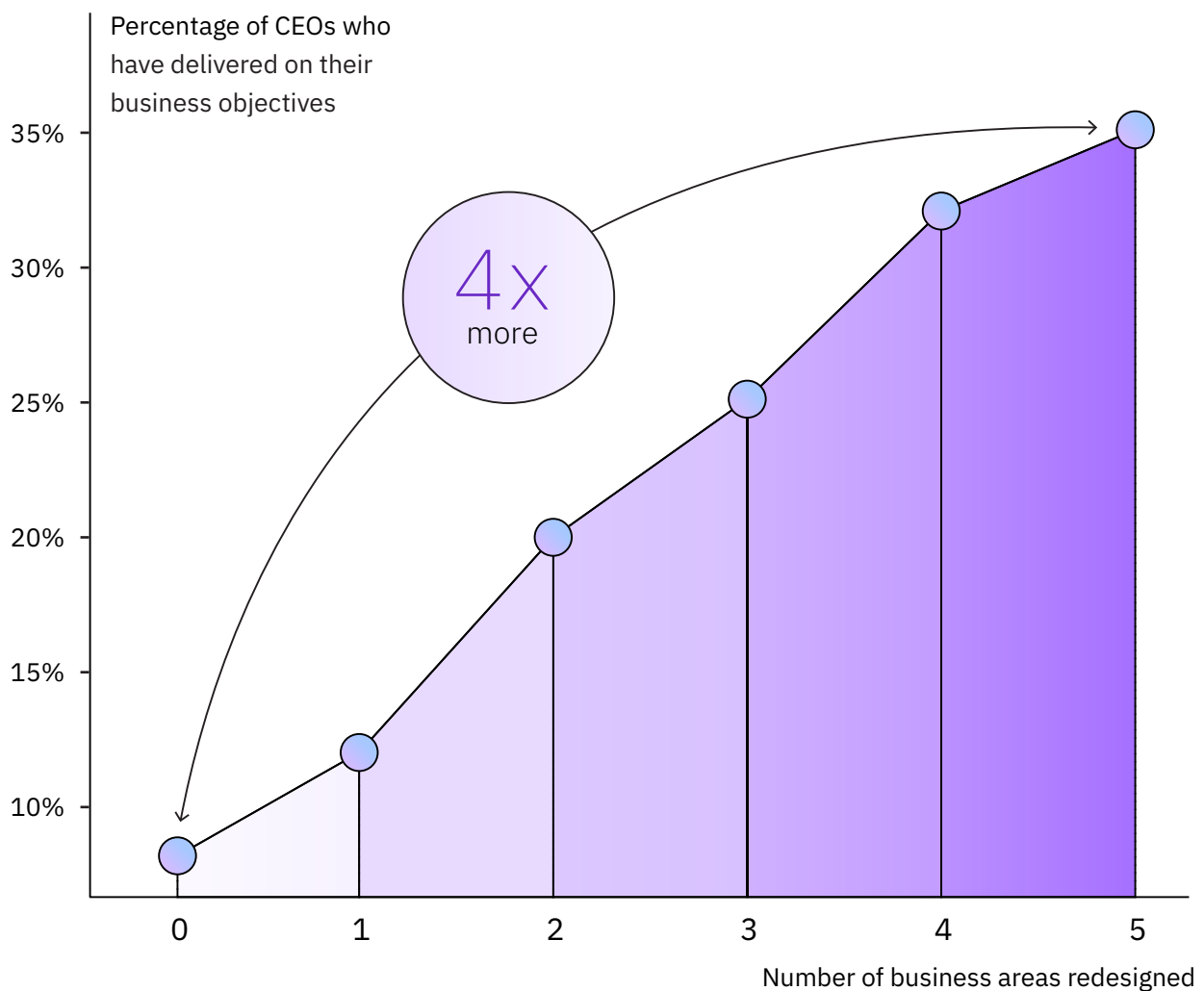
Pablo T. Rivero

CEO, Resy; SVP, Global Dining, American Express, US

Our analysis shows that leaders who have made the most progress breaking down functional boundaries are executing on strategy faster than the competition. Organizations that have redesigned five core business areas—technology, finance, HR, operations, and cross-functional collaboration—are 4x more likely to have delivered on their business objectives (see Figure 4).

FIGURE 4**Comprehensive redesign delivers more business value**

CEOs who have redesigned five key areas of the business are 4x more likely to have delivered on their business objectives



Note: Key business areas include technology, finance, HR, operations, and cross-functional collaboration.

“The introduction of AI is more transformative than the introduction of the internet was at the time—not because of the technology itself, but because of its impact on how people work, decide, and collaborate.”

Jan Polkerman

CEO, Dutch Tax and Customs Authority IT, Netherlands

CEOs should focus on the interlocks that connect functions—the handoffs, decision rights, and collaborative flows. According to our research, when functions evolve independently, performance improves incrementally. When they’re redesigned as an integrated system, performance improvement compounds.

Overall, CEOs say that, in the past year, 19% of their workforce has been reskilled to perform a different role and 41% have been reskilled to perform their current role more effectively. Between 2026 and 2028, CEOs say 29% of employees will require reskilling for a different role and 53% will need reskilling to perform their current role more effectively.

Employees appear ready for this shift. Across all generational groups, at least twice as many employees would embrace rather than resist greater use of AI by their employers. 61% say AI makes their job less mundane and more strategic—and 48% even say they would be comfortable being managed by an AI agent.¹²

Still, CEOs say only 25% of the workforce is using AI regularly as part of their job—despite the fact that 86% of CEOs say employees have the skills to collaborate with AI. The gap between capability and deployment is more an organizational design problem than a skills problem.

“Humans remain essential for judgment calls. AI augments expertise rather than replaces it.”

Andrew Anagnost

President and CEO, Autodesk, US

How to make the play

- **Redesign workflows before redesigning jobs.** 87% of CEOs are actively embedding AI across workflows. But be sure to redesign the workflow first—then update roles to match. Start by mapping where AI executes, where humans provide judgment and integration, and where escalation occurs. Don't fund reskilling unless there's a redesigned way of working, backed by an AI-first culture, ready to absorb it.
- **Take an end-to-end approach to human-AI collaboration.** Map how work moves from signal to action: where AI executes, where humans integrate context and judgment, and where escalation occurs. Make handoffs, accountability, and collaboration rules explicit so teams know how to work with AI, not around it. Define no-go zones for regulatory, trust, or reputational risk. Pressure-test workflows against real scenarios to remove friction before it shows up in production.
- **Reskill for orchestration, not replacement.** Prioritize skills such as systems thinking, interpreting AI outputs, challenging recommendations, and managing exceptions. Redefine performance evaluations and manager training to reward people who blend human and machine intelligence into better outcomes—not just faster ones.
- **Turn AI usage into a key operating metric.** Measure where AI is available, where it's actually used, and where work reverts to manual defaults. When CEOs estimate that only 25% of the workforce is using AI regularly in their job, they need their leaders to explain gaps, remove friction in workflows, and be jointly accountable for closing them. If AI isn't being used, treat it as an operating failure—not a skills issue.

“Innovation and technology are at the foundation of how we think about growth. So, if we're doing our jobs right, we're hiring, retaining, and promoting talent who really embrace and understand the value of innovation.”

Jessica Berman

Commissioner, National Women's Soccer League, US

The prediction: Quantum will cause the next seismic shift.

Play #5

Expect unpredictable futures.

The payoff: 82% of AI-first CEOs are already actively engaging partners in one or more quantum ecosystems to access complementary strengths, reduce risk, and accelerate learning.

Becoming AI-first isn't the final destination. It's the foundation for what comes next.

While quantum advantage—the point when quantum computers can solve problems faster than classical computers alone—hasn't arrived yet, leading CEOs have begun preparing for that eventuality, which is approaching faster than many leaders expect (see Figure 5). They recognize that AI-first capability and flexibility set the foundation for quantum-fueled results—and that adapting operations, infrastructure, and partnerships as conditions change is a prerequisite for preparing for a quantum future.

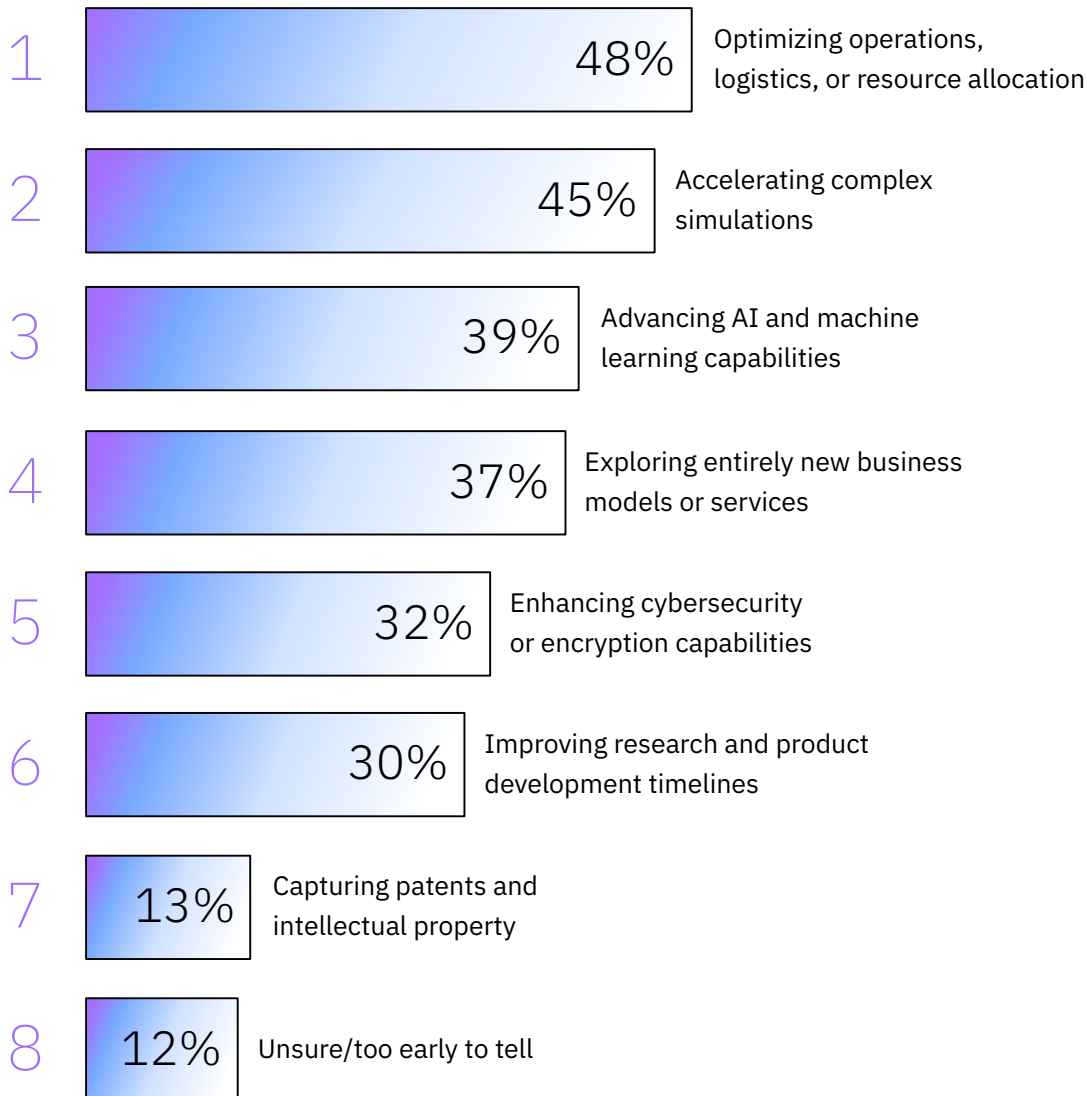
The earliest evidence of advantage may come in specific areas, such as materials development (where quantum can model complex molecular interactions) and pharmaceuticals (where it can accelerate drug discovery). Impact will follow in areas such as supply chain and logistics, where quantum's optimization capabilities could redefine how goods move globally. Ultimately, the window between “quantum is emerging” and “quantum disrupts our industry” will be narrow.

Only 46% of CEOs have a team in place for identifying specific quantum use cases and the associated business value.

FIGURE 5

Where do CEOs expect quantum computing to deliver the most business value?

We asked CEOs to select up to three options. Here's what they chose.



“If you are a fast follower,
I’m not sure you can catch up.”

Carsten Egeriis

Group CEO, Danske Bank, Denmark

Despite the imminent arrival of quantum advantage, fewer than half (46%) of CEOs in our 2026 survey say they have a team in place for identifying specific quantum use cases and the associated business value. That gap provides an opening for CEOs who are already exploring use cases, developing applications, and positioning their organizations to capture value once quantum advantage arrives.

One key preparation tactic is reliance on ecosystems. No enterprise will be able to tap into the value of quantum on its own. The computational infrastructure and expertise are too specialized and expensive to access without the right partners. 82% of AI-first CEOs are already actively engaging partners in one or more quantum ecosystems to access complementary strengths, reduce risk, and accelerate learning, compared to 50% of all CEOs.

These aren't partnerships of convenience. They're strategic alliances built on openness, interoperability, and trust. The same principles that enable AI-first transformation at scale become the foundation for quantum-era advantage. AI-driven systems don't just improve efficiency. They create the strategic confidence and operational flexibility needed to unlock new possibilities.

The CEO pursuing strategic optionality needn't worry about predicting the future. By building open business models and forging ecosystems that multiply capabilities, they are preparing the organization to thrive in multiple possible futures. By investing in a forward-looking technology foundation, they're poised to capture opportunities as they appear and avoid disruptions that threaten to stall progress.

“Building the quantum market requires teamwork across the ecosystem: hardware providers, software startups, and research institutions must move together.”

Dr. Kevin Rhee

CEO, Qunova Computing, South Korea

“You can’t forecast every disruption, but you can prepare by building organizations that are resilient, adaptable, and ready to operate through change.”

Andrew Anagnost

President and CEO, Autodesk, US

How to make the play

- **Explore quantum now.** Don't wait for certainty. Establish a small, cross-functional exploration team with a six-month mandate to identify plausible quantum use cases, simulate value, and engage ecosystem partners. Measure success by learning speed and strategic insight, not near-term ROI.
- **Raise quantum literacy across the C-suite.** Require every C-suite leader to develop working literacy in how quantum could affect their function and how AI, classical computing, and emerging technologies intersect. Make this practical: expect each leader to identify one plausible use case in their domain, articulate the value at stake, and explain what would need to change operationally if quantum capabilities mature. Review insights collectively to build shared strategic confidence.
- **Invest in adaptable foundations that preserve choice.** Focus near-term technology decisions on flexibility. Direct your CIO to prioritize hybrid infrastructure, portable data architectures, and AI systems that can experiment with emerging compute models without major rework. Avoid premature specialization that locks the enterprise into a single possible future.
- **Build strength in numbers.** Prioritize partners and consortia that keep strategic paths open, with a focus on shared standards and platforms and access to scarce expertise without long-term lock-in. Use ecosystems to test use cases, share infrastructure costs, and learn faster than you could alone. Treat ecosystems as strategic infrastructure—multiplying options today so the organization can move fast when the window opens.

Research methodology

Study design and sample

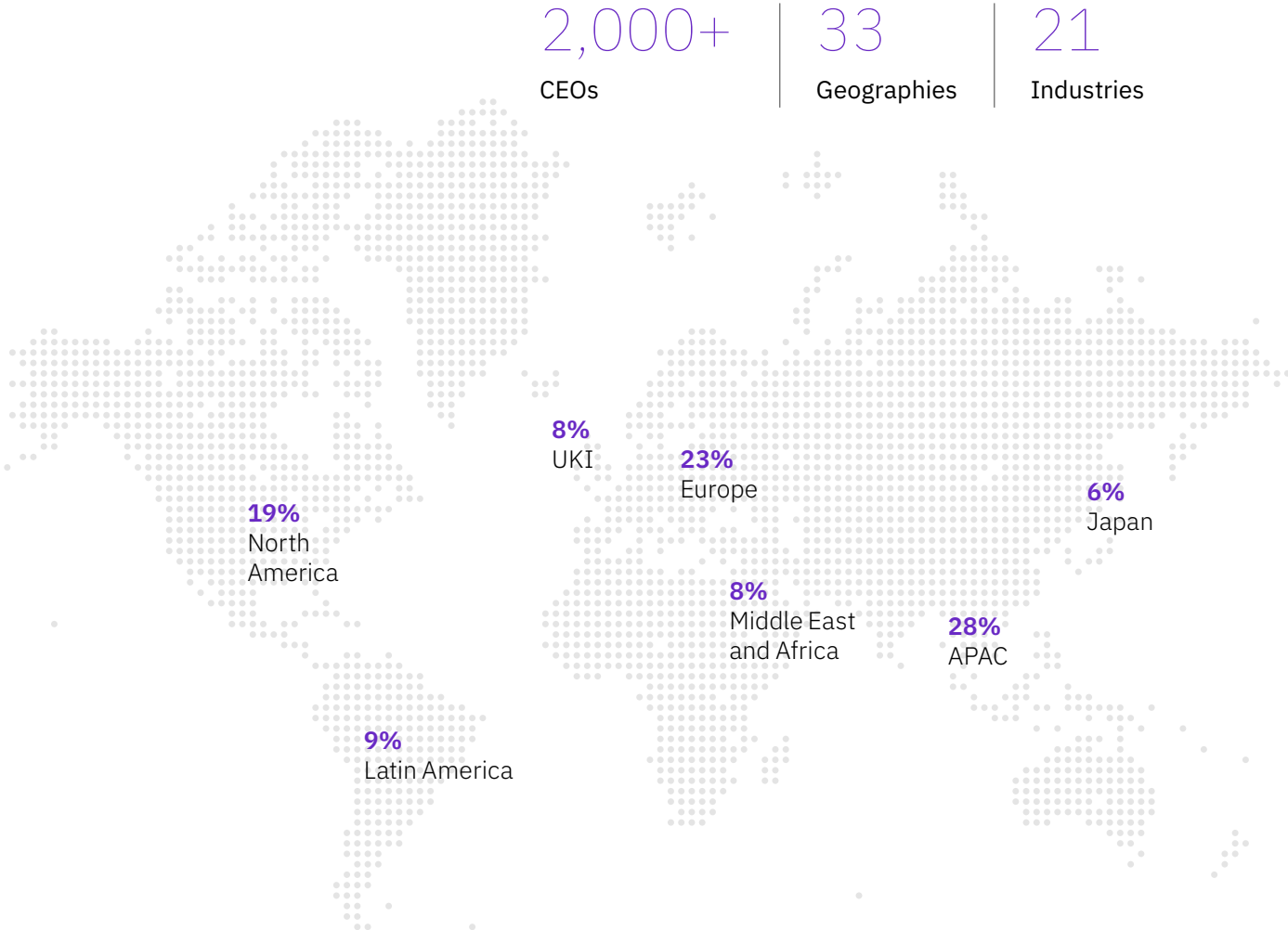
The IBM Institute for Business Value conducted a global CEO survey from February to April 2026 to examine how organizations are redesigning leadership models, operating structures, and execution capabilities in an AI-driven economy. The study draws on responses from 2,000 CEOs and equivalent senior leaders with ultimate responsibility for enterprise strategy and organizational transformation (referred to as CEOs throughout this report).

Respondents represent 33 geographies and 21 industries, spanning a broad range of operating environments and stages of AI adoption. The

sample reflects large, complex organizations, with a median annual revenue or budget of USD5.8 billion and a mean of USD12 billion. Nearly four in five organizations are publicly traded. On average, respondents report 5.5 years in their current role.

Analytical approach

The analysis distinguishes between AI maturity, leadership redesign, and execution at scale, rather than treating enterprise transformation as a single linear journey. A sequenced analytical approach was applied, combining composite measures, segmentations, and comparative analyses to examine how organizations translate AI ambition into enterprise-wide execution and business value.



Integrated AI maturity and AI-first advantage

To assess how organizations achieve an AI-first advantage, an integrated AI maturity composite measure was developed to capture the extent to which AI is embedded across the enterprise.

The composite measure reflects five characteristics that collectively define integrated AI adoption: cross-functional collaboration, embedding AI across workflows, prioritizing AI for long-term differentiation, people-centred adoption, and assessment of emerging technologies. Indicator variables were directionally aligned and standardized, then aggregated into a composite measure of relative AI maturity.

Based on this composite measure, organizations were grouped into an AI-first maturity segmentation, with respondents assigned to quartiles from lowest to highest maturity. The top quartile, referred to as AI-first organizations, is associated with stronger reported historical performance, including a 17% revenue growth premium over the past three years relative to all other organizations.

C-suite disruption and leadership redesign (see play #1)

To assess how leadership structures support AI-first execution, a C-suite leadership redesign composite measure was developed to capture the degree to which CEOs are rewiring leadership models to increase speed, clarity, and accountability.

The composite measure comprises three dimensions: shifts in authority and influence across existing C-suite roles; the introduction or elevation of new executive roles, particularly the Chief AI Officer; and CEO-driven intent to redesign leadership structures, including decision rights and accountability mechanisms, to better leverage AI.

These dimensions were aggregated into a composite measure and organizations were grouped into four levels of leadership redesign, forming a leadership redesign segmentation used throughout the analysis. While some elements reflect anticipated evolution by 2030, the analysis also links leadership redesign to current execution outcomes, including enterprise-wide AI scaling.

Turning speed into scaled value (see play #2)

To assess differences in enterprise-wide AI scaling, a combined foundation and acceleration framework was applied, reflecting CEO commitment to four principles: reinvesting productivity gains to drive innovation, increasing productivity capacity, scaling AI systematically and safely, and accelerating execution.

The foundation component captures three prerequisites for sustained AI-driven value creation: commitment to reinvesting productivity gains, productivity capacity, and disciplined adoption, reflecting the ability to scale AI in a systematic and responsible manner.

The acceleration component captures speed of execution, measured through the pace of deploying AI agents, embedding AI across end-to-end workflows, and trusting AI to support tactical and operational decision-making, backed by human judgment.

Based on combined foundation and acceleration scores, organizations were segmented into quartiles representing relative levels of commitment to these principles. Comparative analysis of the top and bottom quartiles was then used to assess differences in realized execution outcomes. Organizations led by CEOs in the top quartile report, on average, scaling 23% more AI initiatives enterprise wide than those in the bottom quartile.

Tailored AI vision and future revenue innovation (see play #3)

To assess how tailored AI strategies relate to innovation-led growth expectations, respondents reporting systematic use of proprietary data and intellectual property in custom AI models and agents were compared with those that do not.

For each group, the mean expected share of 2030 revenue anticipated from products and services not offered today was calculated, capturing executive outlooks on innovation-driven growth rather than realized financial performance.

Comprehensive functional redesign and business-case realization (see play #4)

To assess how organizational redesign translates into business value, the relationship between the breadth of functional redesign and effectiveness in realizing the full benefits defined in business cases was analyzed.

We constructed an indicator that reflects the number of core business areas redesigned, from zero to five, covering technology, finance, human resources, operations, and cross-functional collaboration. For each level, the share of CEOs reporting high effectiveness in realizing business-case benefits was calculated, enabling assessment of incremental value associated with more comprehensive redesign.

Additionally, to examine the relationship between cross-functional collaboration and execution effectiveness, we conducted a multinomial logistic regression analysis. The dependent variable measures effectiveness in realizing the full benefits outlined in AI business cases, captured on a five-point scale from low to high effectiveness.

The key independent variable is based on agreement with the statement, “We must rethink cross-functional collaboration in our organization to accelerate our pace of business.” This measure reflects a proactive orientation toward redesigning how teams work together, rather than incremental use of AI within existing structures. The model estimates the likelihood of reporting higher effectiveness levels relative to lower ones. Results show that organizations expressing stronger agreement with this statement are more than twice as likely to report high effectiveness in realizing the full benefits of their AI business cases.

Robustness and interpretation

Prior to constructing composite measures and segmenting respondents into analytical cohorts, preliminary checks were conducted, including distribution reviews, variable standardization, and correlation analysis to ensure directional consistency and suitability for aggregation.

Segments derived from composite measures represent differentiated cohorts with stable directional patterns observed prior to reporting. Findings reflect cross-sectional associations and should be interpreted as directional insights, not causal relationships.

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