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THE AI TRENDS REPORT

How to turn AI into business value in 2026 and beyond

Insights from 250 executives across
Europe on AI maturity, scaling,
governance, and business impact

statista⁺

REPORT

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Key facts

01

AI Execution Gap

58% of organizations have a fully defined AI strategy. However, only **44%** have a fully implemented AI operating model.

02

Efficiency over Growth

AI delivers stronger efficiency gains (**84%**) than revenue impact (**75%**).

03

Execution and Cost Overruns

Most AI initiatives fail at or after the pilot stage (**79%**), and many exceed their budget (**65%**).

04

Scaling and Impact Barriers

Integration complexity (**40%**) and data quality (**28%**) are the biggest obstacles to AI scaling and impact.

05

Governance in Progress

AI governance is widely established, but still maturing; **66%** assess risks regularly.

06

Tech-Led Ownership

AI ownership sits mainly in IT (**48%**), with limited business ownership (**7%**).

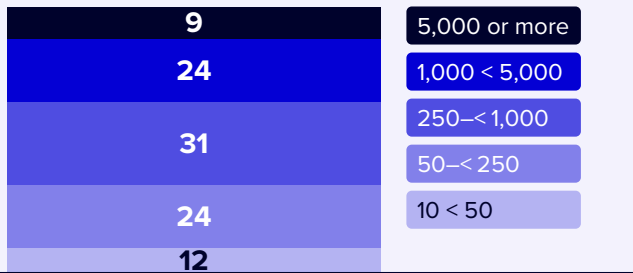
Report Methodology

Based on a quantitative **online survey of 250 decision-makers conducted in April and May 2026 across France, Germany, Italy, the Netherlands and the UK**, the report maps the current state of AI maturity across several key dimensions: strategy, operating models, business impact, scaling barriers, data and infrastructure readiness, governance, and organizational enablement.

Respondents range from C-level executives to team leads, representing business services, industrials, financial services, healthcare, consumer goods, and hospitality. The result is a **data-driven assessment of where European enterprises stand today, and a practical guide for closing the gap between AI ambition and organization-wide value creation.**

FIGURE 1 Company size by employees (percent)

How many people are employed in your company (in total, incl. all locations)?



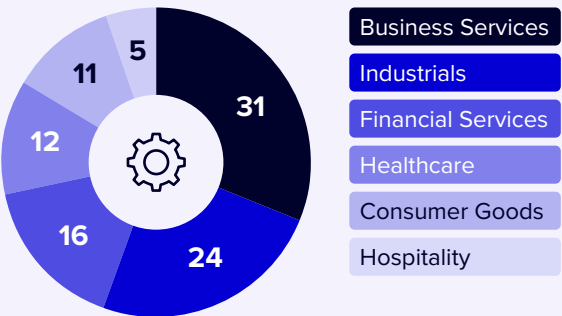
Base: n=250 respondents.

FIGURE 4 Regional coverage



FIGURE 2 Industry distribution (percent)

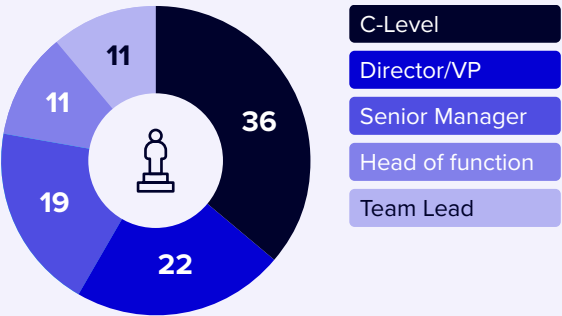
In which industry does your company operate?



Base: n=250 respondents. Respondents selecting 'Aerospace & Defense,' 'Agriculture,' 'Energy, Utilities & Mining,' 'Telecommunications & Media,' 'Public Sector,' or 'Other' are not part of the sample. Percentages may not sum to 100% due to rounding.

FIGURE 3 Respondent seniority (percent)

Which of the following positions best applies to you?



Base: n=250 respondents (see methodology for sample composition). Respondents selecting 'Technical expert without managerial responsibility,' 'Supporting role in IT, Data, AI, or Engineering,' or 'Other' are not part of the sample. Percentages may not sum to 100% due to rounding.

The Execution Gap: Defined AI Strategies Outpace Operating Models

AI has moved beyond experimentation. **58% of organizations now operate with a fully defined AI strategy**, and agentic AI is already in production, not pilots: 40% run multiple use cases live, 34% run one, and only 20% remain in the pilot phase. Governance, infrastructure, and enablement mechanisms are at least partially in place across over 90% of organizations.

Yet a critical execution gap persists. **Only 44% have fully implemented an AI operating model, while 52% remain in transition**, signaling that strategy is outpacing the organizational machinery needed to deliver on it. The implication is clear: A defined strategy without an implemented operating model is a plan without an engine. The priority now is to close the gap between strategic intent and operational reality to turn AI readiness into scalable enterprise value.

FIGURE 5 AI operating model maturity varies significantly by industry (percent)
Do you have an end-to-end AI operating model across your organization (e.g., roles, processes, governance across the AI lifecycle)? Responses for ‘fully implemented by industry’.

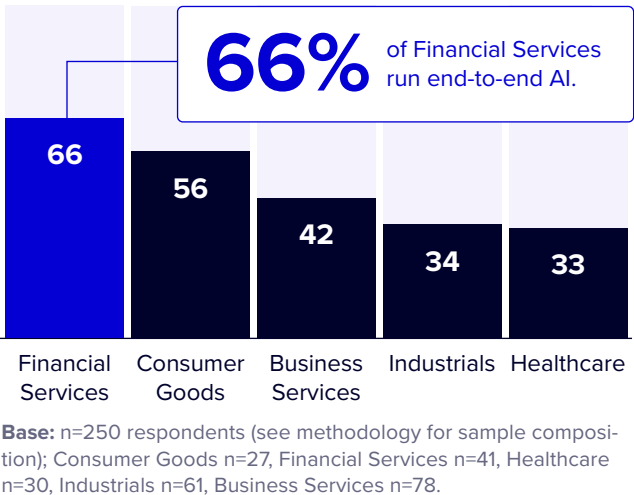
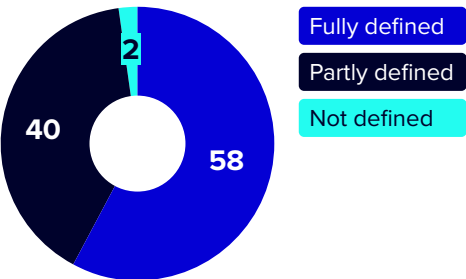
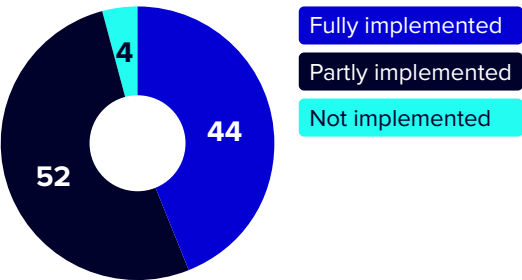


FIGURE 6 AI strategy is largely defined at leadership level across organizations (percent)
Do you have a clearly defined AI strategy at leadership level (e.g., board/C-level)?



Base: n=250 respondents (see methodology for sample composition).

FIGURE 7 End-to-end AI operating models remain under-implemented (percent)
Do you have an end-to-end AI operating model across your organization (e.g., roles, processes, governance across the AI lifecycle)?



Base: n=250 respondents (see methodology for sample composition).

“For a global leader in the food processing industry, we analyzed the full value chain to identify over 250 AI use cases and prioritize those with clear ROI, unlocking €64 million in value potential over six years.”

DANIEL SOUJON
Partner & CTO, OMMAX



Operational Efficiency: Where AI Delivers Its Earliest Returns

AI is already delivering measurable gains, but its impact skews heavily toward internal efficiency. A combined 55% of organizations report efficiency improvements of at least 10%, with 11% exceeding 25%. Productivity leads as the primary AI value driver (41%), and IT and software development generates the highest realized returns today (42%). Revenue impact is emerging but a significant gap remains. Just 36% report revenue improvements above 10%, compared to 55% for efficiency.

The pattern is clear: **AI delivers its fastest, most measurable returns by optimizing how organizations work internally.** Revenue impact is relevant, yet remains a second-order effect for most. But while efficiency gains are substantial, they do not represent the full potential of AI. The organizations that **treat operational AI as a foundation** will be best positioned to redirect freed capacity toward **sustainable value and competitive differentiation.**

The next phase of AI maturity lies in turning efficiency gains into growth by operationalizing commercial use cases and integrating AI into customer-facing value creation.



Commercial use cases remain untapped
39% have marketing personalization scaled and 42% in production; yet only 5% of IT leaders rate it as their highest-value AI use case.

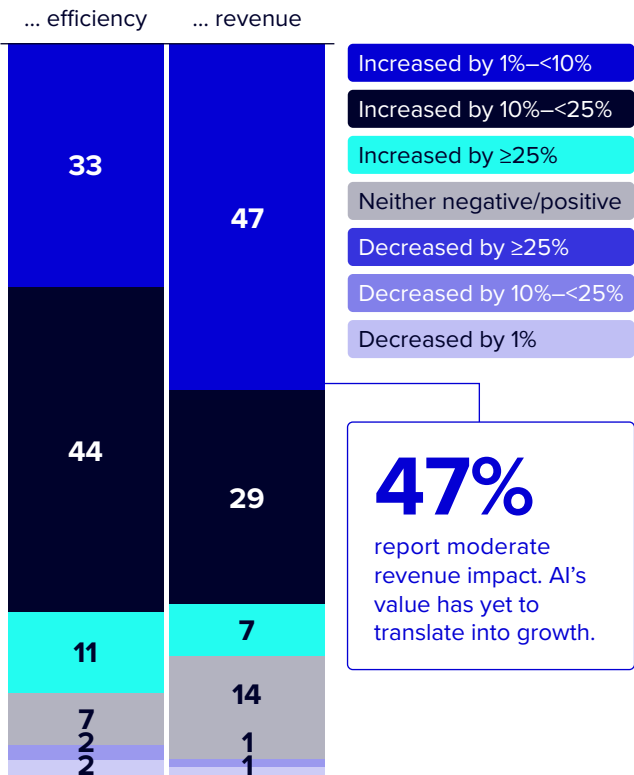
“For a global power tool manufacturer, we deployed AI-driven service automation on a unified data layer, achieving a 250% ROI as part of a €15 Mio cost saving program, and enabling 10× faster information retrieval.”

DR. ANJA KONHÄUSER
Founding Partner, OMMAX



FIGURE 8 Efficiency gains from AI outpace revenue impact (percent)

Based on your estimate, by how much have AI use cases impacted your organizations... ?



Base: Respondents with at least one AI use case in production or at scale (n = 245, see methodology for sample composition). Percentages may not sum to 100% due to rounding.

02 EFFICIENCY FIRST, REVENUE NEXT

FIGURE 9 Operational efficiency leads AI impact across all industries (percent)

What measurable impact has AI had in your organization so far on the following aspects?
Responses for strong or some increases by industry.

	Total	Consumer Goods	Financial Services	Healthcare	Industrials	Business Services
Operational efficiency	84	85	85	80	87	83
Speed/time-to-market	78	81	80	73	75	81
Revenue	75	74	78	73	72	77
Decision quality	74	63	80	80	79	67
Cost efficiency	70	70	63	63	79	65

Base: n=250 respondents (see methodology for sample composition); Consumer Goods n=27, Financial Services n=41, Healthcare n=30, Industrials n=61, Business Services n=78. Graphic shows responses reporting strong or some increases.

Closing the Revenue Gap: From Efficiency Gains to Commercial Growth

Operational efficiency ranks as the strongest overall impact area at 84%. Across industries, the picture varies: operational efficiency is consistently high across all sectors (80–87%), while **speed and revenue gains** are slightly lower but broadly similar. By contrast, **decision quality** and **cost efficiency** differ more markedly, with Financial Services and Healthcare leading on decision quality (80%) and Industrials standing out on cost efficiency (79%).

With cost concerns and unclear ROI ranking among the top scaling barriers (32%), this imbalance carries strategic risk: **organizations that cannot demonstrate AI impact across more aspects could struggle to sustain investment momentum.** The potential is there. Now, the revenue case needs to be built around it deliberately.

“For one of Europe’s largest private universities, we deployed a self-learning agentic system for hyper-personalized outreach at scale – at full scale, over 1.3 million tailored messages will be sent in 100 days, the equivalent of more than 100 sales reps. It’s a blueprint for how AI turns a manual, headcount-bound function into a scalable value-creation lever across a portfolio.”

DR. STEFAN SAMBOL
Founding Partner, OMMAX



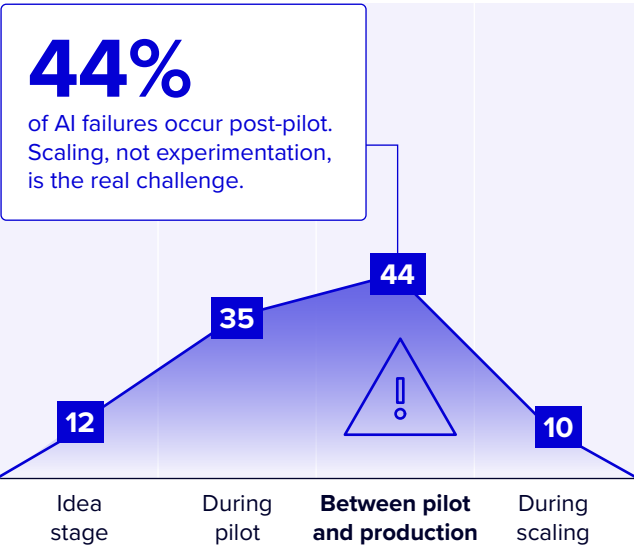
The Production Threshold: Where AI Initiatives Fail

AI initiatives don't die in the lab. They fail at the threshold of production. **44% of failures occur between pilot and production, with another 35% during the pilot itself.** Regional patterns sharpen the picture: in Germany, 43% fail during the pilot; in the UK, 58% fail in the transition to production.

The typical concept-to-production timeline of three to six months (49%) may appear efficient, but **65% of projects exceed their budget**, raising a critical question about net returns. While organizations report efficiency gains through AI, it remains unclear how many of those gains survive after accounting for the true cost of delivery. The cost of failed scale-ups is not just financial, but can erode organizational confidence in AI itself.

FIGURE 10 The biggest failure point for AI initiatives is the move from pilot to production (percent)

Where do AI initiatives most commonly fail?



Base: Respondents whose organizations use AI beyond isolated tasks, ranging from AI-assisted execution to partially or fully autonomous workflows (n=199). Percentages may not sum to 100% due to rounding.

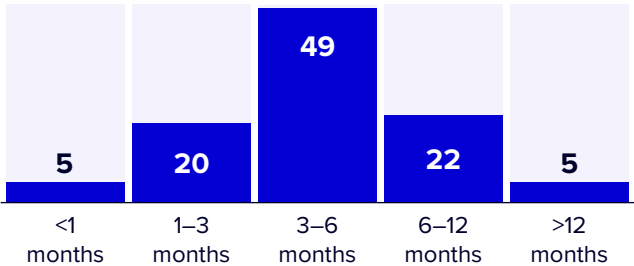


Failure rates are high, but maturity correlates with resilience.

Organizations running multi-step AI workflows report rare failure more often (**38% vs. 29%**), though this likely reflects selection as much as capability.

FIGURE 11 Most AI initiatives reach production within 3–6 months (percent)

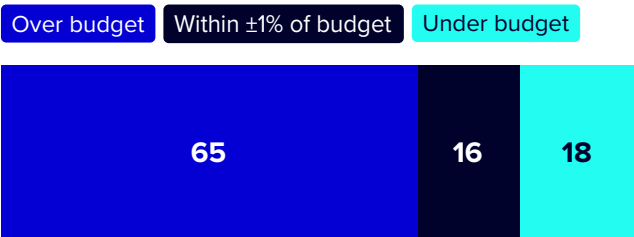
How long does it typically take to move from AI concept to production deployment?



Base: Respondents whose organizations use AI beyond isolated tasks, ranging from AI-assisted execution to partially or fully autonomous workflows (n=199). 'Don't know' responses are not shown.

FIGURE 12 A majority of AI projects exceed their initial budgets (percent)

By how much have completed AI projects differed from their initial budgets on average?



Base: Respondents whose organizations use AI beyond isolated tasks, ranging from AI-assisted execution to partially or fully autonomous workflows (n=199). 'Don't know' and 'Not applicable' responses are not shown.

FIGURE 13 Integration complexity is the primary barrier for AI impact, ahead of talent and ROI challenges (percent)

What are the main barriers preventing AI from delivering stronger operational impact in your organization?



Base: n=250 respondents (see methodology for sample composition). Maximum of three answers possible.

Beyond Infrastructure: Scaling AI as an Organizational Challenge

Over two thirds of decision-makers view their current infrastructure as an AI enabler. And yet, the data tells a more complex story, revealing **persistent structural barriers** beneath that confidence. Integration complexity between systems leads all barriers at 40%, followed by talent shortages (32%), unclear ROI (32%), and fragmented data foundations (30%). Regional variation adds nuance: in Italy, 50% cite Integration complexity; in Germany, only 32%.

Critically, the **barriers are not purely technical**. Skill gaps and unclear organizational readiness point to a parallel challenge that no infrastructure upgrade alone can solve.

Scaling AI is fundamentally a coordination issue: connecting systems, workflows, teams, and decision rights into an orchestrated execution layer. Organizations that address only the technology stack will find themselves stuck in a cycle of successful pilots that never reach production. Instead of only looking at the systems architecture, leadership needs to rethink organizational architecture.



Confidence outruns capability

About two thirds (67%) of respondents believe that their current infrastructure enables scaling AI.

“For a global sportswear brand, we supported AI adoption and coordination across the organization by upskilling over 1,000 employees, developing more than 50 AI prototypes, and rolling out a company-wide AI engagement framework.”

CHRISTIANE JAUCH
Founding Partner, OMMAX



System Integration: The Data Foundation for Scalable AI

Although core systems are widely used across organizations, their integration maturity for AI-driven workflows is uneven. CRM (63%) and customer service platforms (55%) lead the list of data systems used, followed by ERP and marketing automation systems (each 48%). Hybrid cloud dominates as the infrastructure of choice (56%). But integration maturity is uneven. **Front-office systems trend toward full integration (56–59%), but data lakes and warehouses lag behind**, with 53% only partly integrated.

This creates a structural bottleneck: **AI models are only as good as the data they can access, and where systems remain fragmented, even strong models produce inconsistent results.** As long as core data sources remain partly connected, AI value is left unrealized. Building integration around

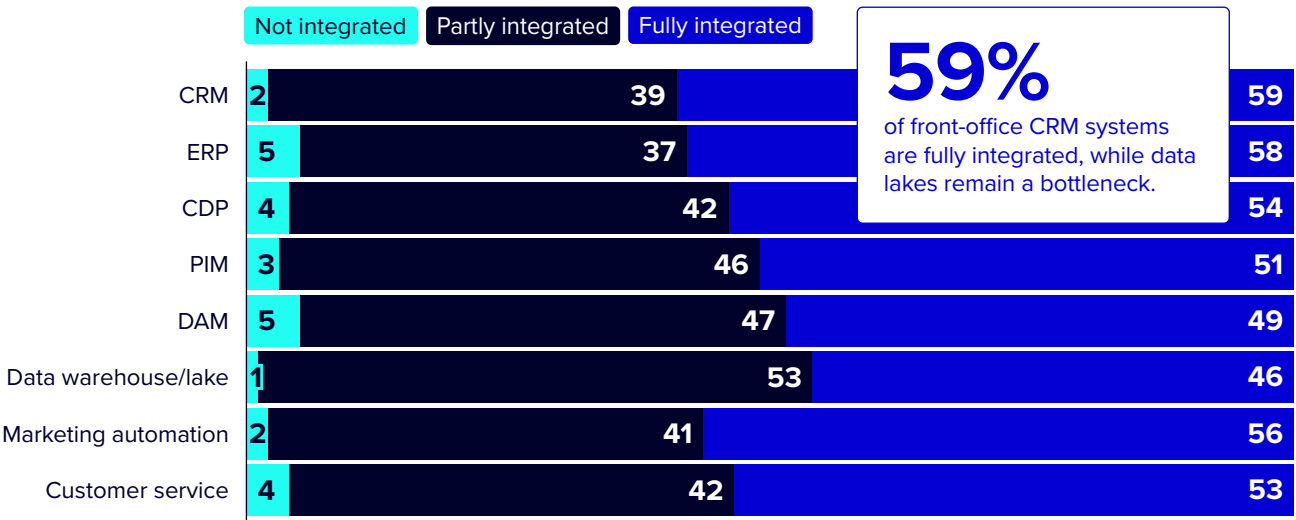
concrete AI use cases and treating integration as a strategic enabler across functions can help overcome remaining fragmentation.

“AI ROI stalls when systems, data and organisations stay fragmented. European organisations face higher demands on data governance and control than their US counterparts. Meeting that bar while unlocking AI and agentic value requires marketing, IT, and legal to orchestrate as one.”

BERTRAND MAUGAIN
CEO, Ibexa



FIGURE 14 Core business systems are largely integrated, but data platforms remain a bottleneck for AI scalability (percent)
How well are these system(s) integrated for AI-driven workflows?



Base: Respondents who selected at least one data system. Sample size by system: CRM (n = 157), ERP (n = 120), CDP (n = 48), PIM (n = 39), DAM (n = 43), Data warehouse/lake (n = 103), Marketing automation (n = 119), Customer service (n = 137). Percentages may not sum to 100% due to rounding.

Source: Online-survey among n=250 decision-makers in France, Germany, Italy, the Netherlands, and the UK conducted by Statista on behalf of OMMAX, Ibexa and Make (2026).

Data Sovereignty: Balancing Adoption Speed with Governance Risk

Data quality is the number one reason AI initiatives fail to scale (28%). And yet, **80% of organizations already share sensitive data with external AI providers**; 39% fully, 41% partially. Most operate under conditional, use case based policies (54%) rather than strict standardized rules (35%), reflecting a pragmatic approach to sovereignty that favors speed over uniformity.

This pragmatism accelerates adoption but introduces risk. **Without clear principles for what data gets shared, with whom, and under what conditions, flexibility becomes inconsistency, and inconsistency becomes liability as regulatory scrutiny intensifies.** A possible strategic move: formalizing data sovereignty into a framework that defines classification levels, rules and requirements. Organizations that build a framework now can move faster and more confidently than those forced to retrofit governance under regulatory pressure.



Industry regulation shapes data sovereignty
44% of respondents in Financial Services follow strict regulations, compared to just **27%** of respondents in Healthcare.

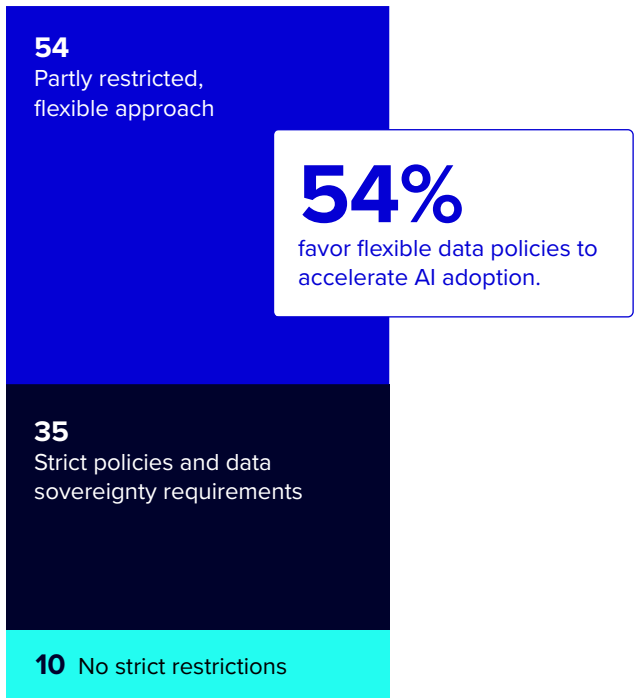


Data posture has flipped from fear to normalization.

80% share sensitive data externally, and **54%** use flexible sovereignty models, widening the gap between data use and governance.

FIGURE 15 Data sovereignty is primarily managed through flexible, use case-based approaches (percent)

Which of the following best describes your approach to data sovereignty in AI?



Base: n=250 respondents (see methodology for sample composition). Percentages may not sum to 100% due to rounding.

“For one of the largest national transport providers, we implemented a holistic data excellence and governance program, achieving over 99% data quality, enabling the automation of > 25 processes, and contributing several million euros to EBIT through improved performance tracking.”

TONI STORK
Founding Partner & CEO, OMMAX



AI Governance: Established Frameworks but not Fully Mature

AI governance has moved from aspiration to implementation. What needs to follow next is full maturity. **Most organizations have at least partially implemented key governance capabilities, and 66% assess AI risks often or very often.** The numbers, however, reveal a blind spot: governance for Agentic AI (46% fully implemented) barely exceeds general AI governance (45%), suggesting most organizations are applying existing frameworks to a fundamentally different paradigm where AI systems act autonomously and in sequence.

Meanwhile, **46% report that regulatory requirements slow down deployment**, indicating that internal governance and external compliance demands remain misaligned. **Governance must evolve from deployment checklists to operational oversight that satisfies both internal standards and external regulation.** Agentic AI requires real-time monitoring, decision audit trails, and escalation protocols that traditional governance does not provide.

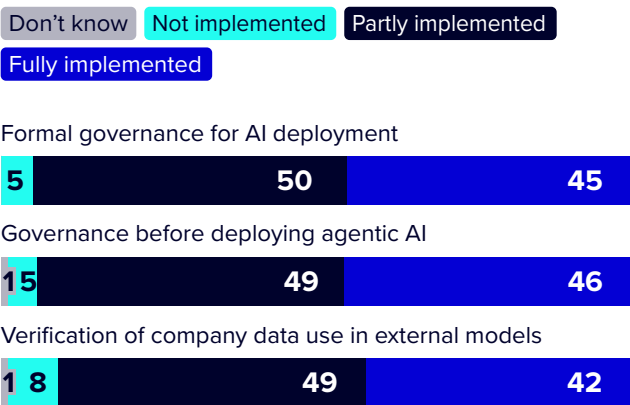
“For any agentic workflow, control and observability are essential.”

LUTZ FINGER
Senior Advisor, OMMAX



FIGURE 16 Governance is established across organizations, but often only partially implemented (percent)

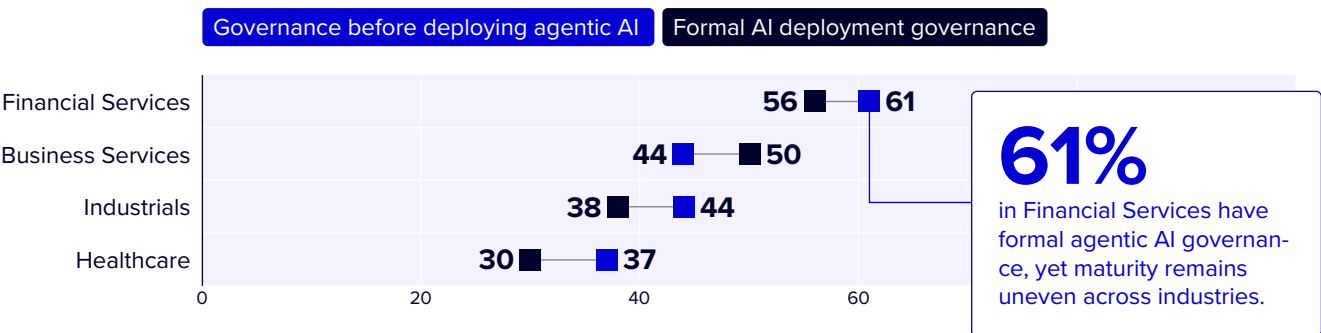
To what extent are the following AI governance capabilities implemented in your organization?



Base: n=250 respondents (see methodology for sample composition). Percentages may not sum to 100% due to rounding.

FIGURE 17 Financial Services leads on governance maturity (percent)

To what extent are the following AI governance capabilities implemented in your organization?
Responses for ‘fully implemented’ by industry.



Base: n=250 respondents (see methodology for sample composition); Financial Services n=41, Healthcare n=30, Industrials n=61, Business Services n=78.

Source: Online-survey among n=250 decision-makers in France, Germany, Italy, the Netherlands, and the UK conducted by Statista on behalf of OMMAX, Ibexa and Make (2026).

Ownership and the Capability Gap:
Why Technical Control Limits
Business Value

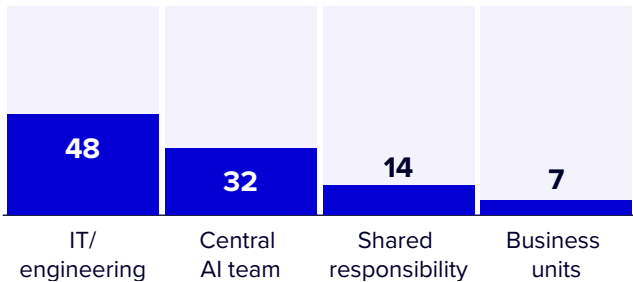
AI ownership tells a revealing story. **Nearly half of all AI execution (48%) sits within IT and engineering, while only 7% is placed in business units.** This concentration helps explain why AI’s strongest impact is operational efficiency while revenue lags: **technical ownership naturally optimizes for infrastructure and process, not for commercial outcomes or customer value.**

Enablement reinforces the pattern. While most organizations have at least partially implemented key mechanisms, a closer look partially reveals that full implementation remains lower, from just 39% for employee enablement to 53% for ROI tracking.

The risk: **AI remains a technology initiative** rather than a business transformation.

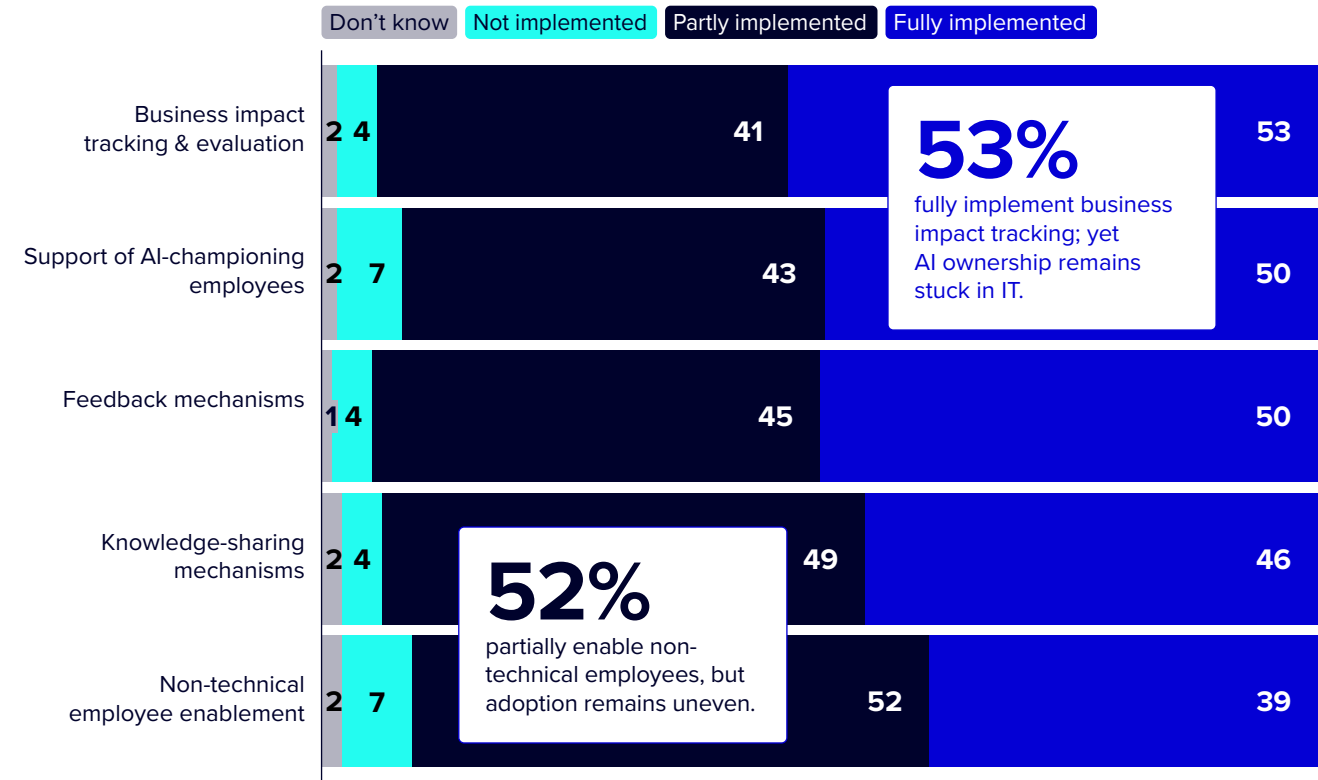
The corrective action is structural. AI ownership models that pair technical capability with business accountability **distribute ownership within commercial, product, and customer functions.** Knowledge sharing and AI champions are mechanisms that compound AI returns across the organization.

FIGURE 18 AI ownership is concentrated in IT, limiting business-driven value creation (percent)
Who owns AI execution in your organization today?



Base: n=250 respondents (see methodology for sample composition). Percentages may not sum to 100% due to rounding.

FIGURE 19 AI enablement is in place, but full implementation remains limited (percent)
To what extent are the following AI enablement practices established in your organization?



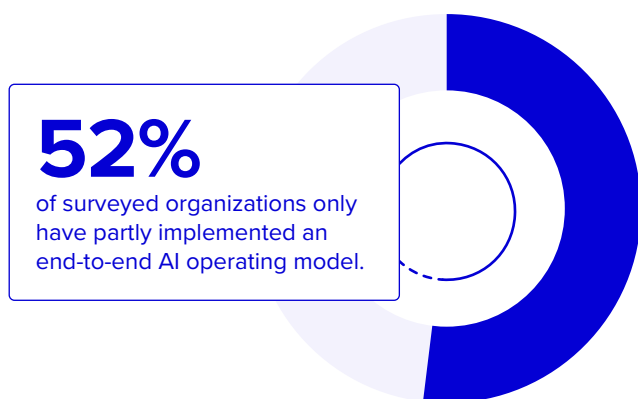
Base: n=250 respondents (see methodology for sample composition). Percentages may not sum to 100% due to rounding.

From Scaling to Orchestration: The Next Frontier in Enterprise Value Creation

The journey from strategy to scaling is well understood. What comes next is not: enterprise-wide value creation. With 52% of operating models still in transition and integration complexity the top barrier at 40%, most organizations remain in the scaling phase. **The next frontier will not be defined by more use cases, but by how effectively organizations connect them: linking systems, data, workflows, and decisions into a coordinated whole**, effectively moving from isolated applications to **orchestrated AI across the value chain**.

FIGURE 20 Full-scale AI remains elusive

Do you have an end-to-end AI operating model across your organization?



Base: n=250 respondents (see methodology for sample composition).

Agent-to-agent workflows, where autonomous systems coordinate decisions and actions across functions, represent one of the most promising directions. Organizations that achieve this level of orchestration will build **structural competitive advantages** that are difficult to replicate. The leadership question has shifted: it is no longer how to adopt AI, but how to build an enterprise that runs on it.



Orchestrating AI across the value chain means distributing ownership across the organization

Yet only **7%** place ownership in business units versus **48%** in technical functions, and the divide sharpens by region and sector. **54%** of German organizations keep AI ownership primarily in IT, as do **59%** in Financial Services and **57%** in Healthcare.

“The winners of the AI-era won’t just be the ones who use AI the most. It’s those who build the system that makes it visible, with control as you scale. The leading businesses are already moving from isolated automations to connected agent networks, and the challenge is governance. At Make, our conviction is that every workflow, every agent, every action must remain auditable and traceable.”

FABIAN VEIT
CEO, Make



Leadership Priorities: Five Actions for AI-Driven Value Creation

The findings point to a clear conclusion: the challenge is no longer access to AI, but execution across systems, data, and organizational structures. Leaders differentiate themselves by addressing these five priorities to turn fragmented initiatives into enterprise-wide value creation:

01

Think business AI-first.

With **48%** of AI ownership in technical functions, the bias toward infrastructure over impact is structural. Shift from technology-led deployment to business-led transformation by tying every AI initiative to a commercial or customer outcome.

02

Distribute ownership.

Move AI accountability beyond IT into business functions. Only 7% of organizations place AI ownership in business units today. Appoint business-side AI leads with direct responsibility for AI-driven outcomes.

03

Align operating model to strategy.

58% have a defined AI strategy, but only **44%** have a fully implemented operating model. Conduct a gap analysis between strategic ambitions and operational delivery capacity, and resource accordingly.

04

Fix data and integration before scaling agents.

With **40%** citing integration complexity and **28%** citing data quality as top failure drivers, foundational discipline must come before scaling AI and AI agents. Sequence company roadmaps: integrate first, automate second, orchestrate third.

05

Treat enablement as infrastructure.

ROI tracking (**53% fully implemented**) AI champions (**50%**), and knowledge sharing (**46%**) are key priorities, not side projects. Budget, staff, and govern them like any other enterprise capability. Organizations that treat enablement as key priority will compound their AI returns over time.

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