# KPMG 2025

# Technology & Telecommunications

## CEO Outlook

KPMG International

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**KPMG. Make the Difference.**

# Foreword

A number of forces are shaping the technology and telecommunications sector. Investment in Artificial intelligence (AI) is massive and the pace of change intense. AI is enabling companies to automate processes, improve efficiencies, and with Agentic AI, assist in decision making. Businesses are also coming under pressure to use AI to secure growth and questions are beginning to being asked about whether investments in AI will pay off. In addition, those operating in the sector, and their customers, are also concerned about trust. Specifically, there is a focus on integrity and confidence in products and outputs in a world where increasingly more outcomes are determined by AI.

Companies are concerned about the shape and make-up of their current and future workforces. Determining which functions and activities can be undertaken by AI may be straightforward in certain settings but determining the right balance between human intelligence (HI) and AI, is an evolving challenge. Decisions around hiring, retiring, skilling and upskilling must all be revisited.

Regulatory compliance concerns also loom high on leaders' priorities and is affecting the way in which they invest in and role out AI. In addition to differences across the globe regarding data privacy, tariffs, and antitrust restrictions, complications related to cyber security and matters of national security interests can restrict where companies invest, and where they source and sell products and services.

Meanwhile, as the sectors thirst for energy continues to rise, companies across the sector must consider how they can source reliable, affordable resources. While attitudes differ across the globe, many companies are leading the way in investing in and procuring energy from sustainable sources, while reducing emissions across their operations and supply chains.

Against this backdrop, the 2025 CEO Outlook survey reveals how technology and telecommunications CEOs are addressing these major economic, technological, geopolitical, regulatory, and talent challenges. The responses indicate that the sector is approaching the future with confidence, keen to embrace AI and innovate.

Technology and telecommunications companies may be spearheading the AI revolution, but it's equally important that they use this exciting technology effectively within their own businesses, while continuing to exert the entrepreneurial qualities so characteristic of the sector.

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**Anna Scally**
Global Head of Technology, Media & Telecommunications, KPMG International

# Executive summary

**Faced with rapid and unpredictable geopolitical, economic and technological change, today's technology and telecommunications leaders retain a firm yet measured confidence in the prospects of both the sector as a whole and their companies in particular. Expectations of growth are high, while M&A remains firmly on the table — not just to acquire customers, but, increasingly, to access AI talent and infrastructure.**

AI is considered a major vehicle for transforming efficiency and driving new revenue streams from innovative new products and fresh routes to market. According to the CEOs surveyed, technology and telecommunications companies are putting their money where their mouths are and investing heavily in AI. However, there is concern over the ethical challenges of AI adoption, and a recognition that strong governance is necessary to maintain stakeholder trust.

Given the transformational impact of AI, these leaders feel they have some work to do to bring their workforces up to speed — including winning hearts and minds. Companies are investing substantially in upskilling, with a willingness to seek external support to integrate AI and access valuable expertise. Another challenge to overcome is the intergenerational shift, with a need to satisfy employees of different ages and experience with compelling career opportunities.

Sustainability may have taken a back seat in certain geographies, but wider environmental, social and governance (ESG) issues remain an imperative for many in the sector. CEOs point to a pressing need to meet compliance and reporting requirements. The sector is yet to fully embrace the potential of ESG to deliver value, by reducing dependency on unreliable energy sources, reducing costs and creating more reliable supply chains. And, while CEOs are largely optimistic about their ability to hit net zero targets, they admit that they need more technical skills in this discipline.

In a sector that literally drives the world, its leaders are surging ahead with confidence, but also with a degree of caution, in order to both deliver and harness the huge potential of technology in a safe and sustainable manner.

# Key findings

## Economic outlook and business confidence

### 80%

of CEOs are confident in their companies' growth prospects and 83% are confident in the sector's growth prospects
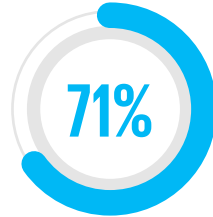
### 40%

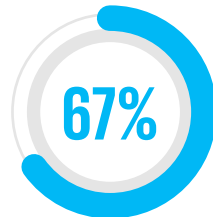of CEOs now anticipate "robust" earnings growth, compared to 29 percent in 2024

### 43%

display a "high" appetite for "transformative" M&A

## AI powered technological innovation

**71%** of CEOs agree that AI is a top investment priority

**67%** of organizations anticipate allocating 10-20% of their budgets on AI in next 12 months

Ethical challenges present the single greatest barrier to successful AI implementation

## Tuning the workforce into an AI world

### 62%

of CEOs believe agentic AI will have a "transformational" or "significant" impact on their organizations

### 45%

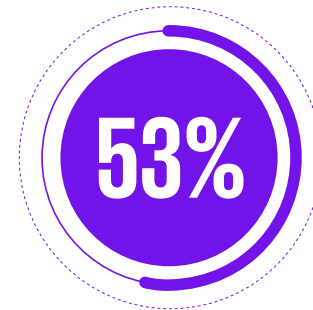of CEOs say employees' technical capabilities and skills are a barrier to AI implementation

### 49%

are investing in AI education and training across the workforce
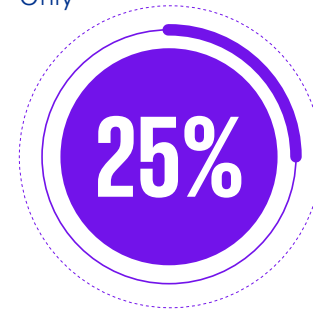
### 39%

say bridging the gap between existing and desired skills as a challenge in attracting and retaining AI and digital talent

## Achieving strategic advantage through ESG

**53%** of CEOs prioritize ESG compliance and reporting to meet investor and regulatory expectations

Only **25%** fully integrate the costs and potential ROI of sustainability initiatives into every major capital decision

**20%** feel lack of sustainability skills is a major barrier to achieving net zero goals

# 01

# Economic outlook and business confidence

In an unpredictable and fast-changing environment, technology and telecommunications CEOs retain strong optimism. Eighty percent are confident in their companies' growth prospects, and 83 percent are positive about the sector's growth prospects, up from 74 percent in 2024. These findings reflect the pivotal position of technology and telecommunications in driving industries, governments and citizens' lives. For many leaders, uncertainty is less a restraint and more business-as-usual, as their companies disrupt the status quo with new products, services and business models.

Expectations of earnings growth have risen substantially in the past year, with 40 percent of CEOs now anticipating "robust" rises (2.5–5 percent), compared to just 29 percent of CEOs who shared that view in 2024. Technology company leaders are slightly more bullish than their telecommunications counterparts — which is not a surprise, given the sky-high market capitalization of the major technology players, buoyed by the rapid growth of AI.

Most of the CEOs surveyed (89 percent) are pursuing inorganic avenues to growth, with 43 percent displaying a "high" appetite for "transformative" acquisitions. Telecommunications companies are being challenged by new competitors, notably in the business-to-business end of the market, and may consider strategic M&A to boost their offering. And some are buying into new product areas to increase customer 'stickiness' through cross-selling broadband and streaming services. They are also investing in rolling out fiber networks.

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**The Tech M&A market continues to be buoyant.  We're seeing a trend in strategic investments from technology companies, often in the form of bolt-ons or expansion in other regions. With respect to US players going into Asia Pacific, rather than the traditional 100 percent acquisition, some are opting to take a smaller percent share to spread their bets across multiple rising stars, in the hope that a few will break through."**

**Simon Dubois**
Head of Technology & Media,
Australia and Asia Pacific
KPMG Australia

## Paths to growth differ amongst subsectors

Almost three-quarters of CEOs (73 percent) state that their businesses have adapted their growth strategies to meet changing market conditions, which may be indicative of the sector's heightened exposure to regulatory, infrastructure, and geopolitical challenges. Some jurisdictions have introduced sourcing restrictions on network equipment due to national security considerations, to counter the threat of spying and/or theft of intellectual property. Similar constraints apply to semiconductors and hardware in select regions, although less so for software. Technology and telecommunications executives are monitoring potential changes in tariff regulations that may affect supply chains, which should be agile enough to pivot to new sources.

When asked about the top operational priorities to achieve growth, CEOs from telecommunications companies cite digitization and connectivity (26 percent). These responses indicate the need to modernize infrastructure to support as-a-service models (such as AI-as-a-service and cloud-as-a-service), and roll out 5G, satellite and software-defined networks to improve global connectivity.

For technology sector leaders, on the other hand, the top aims are reevaluating and adapting business and operating models to enhance innovation (18 percent), and understanding and implementing generative/agentic AI (18 percent). In this subsector, businesses are embracing cloud computing, edge computing, and decentralized digital ecosystems, and seeking to give customers highly personalized, immersive experiences. Another technology trend is for collaborations between different players, including software, AI, and semiconductor companies.

## Cybersecurity continues to cast a shadow

The biggest factor driving short-term decisions is cybersecurity (39 percent). Across the global survey, only banking and capital markets rank this factor higher, which reflects the extent of the cyber threat to telecommunications networks and technology platforms and software. Gen AI is giving bad actors additional tools to steal data and plant ransomware, including deepfakes and phishing. Quantum decryption is a further threat looming on the horizon. Regulatory demands on cybersecurity place additional pressure to demonstrate strong defenses, with a race to achieve quantum encryption and keep ahead of bad actors.

Telecommunications CEOs' decisions are especially influenced by technological disruption (32 percent) and AI integration (33 percent), as they integrate AI into network operations, predictive maintenance, chatbots, and responsible AI frameworks to improve customer service and infrastructure management. Indeed, across the global survey, telecommunications is number one for technological disruption, a sign that companies in this sector are making significant efforts to innovate at pace.

In contrast, technology chief executives see supply chain resilience as a relatively bigger concern (30 percent), to cope with tariffs, geopolitical disruption, and sustainability/energy demands for data centers.

To address these challenges, CEOs say their organizations are increasing investment in cybersecurity (51 percent), with an emphasis on enhanced data security and identity access management, security-as-a-service featuring end-to-end encryption, and regulatory compliance.

They are also investing in AI integration into business processes and workflow (36 percent), technological innovation (31 percent) and regulatory compliance (29 percent). By raising efficiency, companies can reduce costs and improve service reliability.

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## 02

# AI-powered technological innovation

For the technology and telecommunications executives taking part in our global survey, AI is a top investment priority, echoed by 75 percent of respondents from the technology sector and 66 percent from telecommunications. This variation is understandable, given that technology companies are both developing AI and adopting it within their own operations. Agentic AI systems bring the promise of independent decision-making and an ability to adapt to changing situations, enabling tailored customer interactions.

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Many telecommunications companies are still reliant on legacy infrastructure designed primarily for basic connectivity. Agentic AI offers a powerful catalyst for transformation—enabling telcos to modernize their networks and application layers to deliver smarter, more resilient services. By anticipating and resolving customer issues before they surface, adapting offerings in real time, and enabling hyper-personalized experiences, telcos can reposition themselves as intelligent, customer-first tech-cos. This marks a decisive shift from being traditional connectivity providers to becoming dynamic digital service enablers."

**Aseem Sharma**
Head of Telecommunications Sector, Asia Pacific
KPMG in Singapore

The chip industry is using AI to create AI-compatible hardware, embedding AI in production processes to enhance efficiency and product standards. Software-as-a-service (SaaS) providers are harnessing AI to enhance personalization, efficiency, and data intelligence. And telecommunications companies are benefiting from AI-powered chatbots, predictive analytics, and cloud-native networks to enhance customer service, optimize performance, and deliver seamless digital experiences.

To support these ambitions, technology and telecommunications companies are investing heavily in AI, with 71 percent of technology companies and 62 percent of telecommunications companies intending to allocate between 10 to 20 percent of their budgets to this technology. CEOs in the technology sector are likely to have a more defined view of their AI investments, while their telecommunications peers are giving business units considerable autonomy to experiment, encouraging adoption on a decentralised basis.

According to the respondents, the top benefits of AI are improved decision-making and data analysis, new products or services generating fresh revenue streams, and increased innovation. For example, streaming platforms and digital media companies are leveraging user data for personalized content, advertising models, and AI-driven audience insights. Telecom operators are using AI to accelerate big data analytics for customer insights, optimizing networks, and improving cybersecurity.

The sector's confidence in AI is highlighted by the fact that 84 percent of CEOs expect to see a positive ROI in AI within 3 years, and 22 percent anticipate a ROI in 12 months or less.

## Bumps in the road to AI — or serious obstacles?

CEOs feel that ethical challenges (64 percent) present the single greatest barrier to successful AI implementation, with fears over AI model bias discriminating against customers, failure to meet data privacy regulations, and copyright violations from unauthorized usage of intellectual property. Trust in AI is a huge issue, and CEOs across the sector should be applying strong governance over who uses AI, in which areas of the business, and where the data is sourced.

A significant proportion (59 percent) see data readiness as a top challenge, as they struggle to access reliable, clean, and well-structured data from multiple sources. In a recent KPMG survey, RevOps Redefined: A growth playbook for TMT, 50 percent of respondents reported that data silos prevent a unified view of customers across marketing, sales, and customer service. This led to missed cross-sell and upsell opportunities, customer churn, delays between order and activation, and billing errors.

Another perceived obstacle is lack of regulation (cited by 60 percent of technology CEOs and 43 percent of telecommunications CEOs), reflecting uncertainty

around compliance and legal standards in AI deployment. Regulatory frameworks for online content are evolving, with implications for how internet companies engage with oversight bodies. Technology and telecommunications companies are monitoring regulatory developments that may affect national security and consumer protection, and could have differing impacts on social media and other 'big tech' players.

The cost of AI implementation is not underestimated by the survey respondents — 50 percent see this issue presenting a barrier to scaling up usage. Many organizations are undertaking multiple, siloed AI pilots across the business, rather than coordinating their efforts. Not only can this push up costs; it also may result in minor or zero performance gains and reduce confidence in the ability to gain a desired ROI in AI.

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## 03

# Tuning the workforce into an AI world

As technology and telecommunications companies intensify their use of AI and other technologies, workforce strategies need to adapt to new ways of working. More than six out of ten CEOs surveyed (62 percent) feel that agentic AI will have a "transformational" or "significant" impact on their organizations. Traditional go-to-market team structures, for example, could look very different when AI is performing lead generation, responding to prospects and customers, and autonomously writing bids.

Forty-five percent of CEOs surveyed say that employees' technical capability and skills are a barrier to AI implementation, and 34 percent are concerned about the ability of their people to culturally adapt to and adopt AI. Fears of being replaced by AI, or being unable to keep up with the pace of change, are holding workers back from fully embracing this technology.

The top response to these challenges (57 percent) is to communicate openly about AI's impact on roles, to show people the benefits and help assuage their concerns. And 49 percent say they are investing in AI education and training across the workforce, in a bid to improve AI literacy and build confidence. The pace at which AI is developing calls for constant training, workshops and hackathons, and to emphasize the importance of strong governance to maintain trust.

Of all the sectors involved in the survey, telecommunications is the most likely to deploy staff from traditional to AI-enabled roles (67 percent) — the figure for technology is just 58 percent.

There is also an acknowledgement by sector leaders that they may not have all the answers in-house, with 46 percent agreeing on the need to engage with external AI experts, both to help integrate AI and to access up-to-date know-how when required.

> "Technology and telecommunications leaders have to achieve the right balance between AI and 'HI' (human intelligence). As agentic AI streamlines processes, automates, codes, answers queries and makes decisions, companies must decide how to deploy their people. And they can only get the full benefit from AI if they train the workforce to use AI and experiment."

**Anna Scally**
Global Head of Technology, Media & Telecommunications, KPMG International

## Shaping up to the future workplace

Like many sectors, technology and telecommunications must cope with demographic shifts, as older workers retire and younger ones consider where they want to develop their careers. When asked to name the top labor market impacts on their companies, CEOs point to generational gaps on key future skills, including AI uptake (34 percent). Second is the widening expectation gap between older and younger employees (22 percent), as newer generations expect more flexible careers, with a wider range of options, and opportunities to take on different roles and learn new skills on a more frequent basis.

It won't be easy to resolve these issues. The top challenge in attracting and retaining AI and digital talent is bridging the gap between existing skills and desired capabilities, with respondents from telecommunications (45 percent) especially worried about this lack of essential resources, compared to 34 percent of technology CEOs. Arguably, technology is considered the sector of choice by many younger candidates, eager to work on the cutting edge of innovation, and telecommunications companies need to consider what kind of brand proposition is required, to compete for the best talent.

Respondents are also alert to aging workforces, with 59 percent expecting a "moderate" impact on recruitment, retention and organizational culture, and a smaller but still significant 28 percent anticipating a "high" impact. There is almost unanimous agreement of the need to invest in skills development and lifelong learning in communities (87 percent), and to foster positive internal cultures and engage with communities (77 percent).

Perhaps most importantly, leaders should encourage a complete rethink of how AI is disrupting the workplace, and how future careers might develop. One key question is: how can companies build core knowledge when much of the entry-level work will be performed by machines?

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## 04

# Achieving strategic advantage through ESG

While ESG may be a lower priority in some geographies, technology and telecommunications companies are highly aware of their responsibilities to meet stricter sustainability reporting requirements, become more energy-efficient, and reduce carbon emissions and waste. The top response to geopolitical change is to prioritize compliance and reporting standards to meet investor and regulatory demand (53 percent).

CEOs say their second most important action is to align sustainability goals with core business strategy to demonstrate value to stakeholders (43 percent). Additionally, 62 percent state that they have embedded sustainability into their business and believe it is critical to long-term success. For multinationals with a global footprint, meeting increasingly tough sustainability standards in regions like Europe is essential, and investors expect clear transparent reporting to demonstrate compliance.

Imperatives for technology companies include redesigning data centers to conserve energy, adopting energy-efficient coding, and exploring cleaner energy alternatives like nuclear power, plus eco-friendly fuels like biogas and green hydrogen. Hardware manufacturers are exploring cooling technologies such as direct-to-chip and liquid immersion cooling, along with incorporation of eco-friendly materials. Telecommunications players are also investing in energy-efficient infrastructure, and advanced networking solutions to improve sustainability, transparency, and regulatory compliance.

Forty-five percent of telecommunications CEOs say their companies remain fully committed to sustainability goals — more than any other sector in the survey (the global average is 30 percent). In a highly regulated industry, leaders have to meet high ESG standards in many markets, as well as creating environmentally friendly brands that resonate with customers.

However, not all technology and telecommunications companies share this level of commitment, suggesting varying approaches to sustainability across global markets. Seven percent state that they have scaled back their sustainability initiatives to balance other business priorities, while 20 percent are reassessing the role of sustainability in their strategic priorities. Younger generations of workers may expect companies to be committed to low emissions and energy-efficiency, which puts even greater pressure to become more sustainable.

## Can technology and telecommunications companies walk the walk?

Respondents express a positive outlook regarding ESG ambitions. Sixty-eight of CEOs are confident their companies can meet their net zero goals by 2030, and 74 percent believe they have the capability and capacity to meet new reporting standards.

However, they also acknowledge the existence of barriers, the greatest of which is lack of appropriate skills and expertise. Another obstacle is the difficulty in decarbonizing complex and sometimes opaque global supply chains, subject to Scope 3 reporting, which means first accessing the data to fully understand emissions, and then, potentially, working with partners on cutting their footprint.

Technology and telecommunications businesses are taking a number of steps to tackle energy transition and sustainability challenges, with 53 percent of chief executives monitoring regulatory developments and maintaining dialogue with oversight bodies to anticipate changes that might affect innovation strategies. Collaboration and partnerships are another priority (49 percent) to drive innovation that aligns with regulatory guidelines.

There's considerable hope amongst the survey respondents that AI can augment the sector's sustainability efforts, by identifying resource efficiency opportunities, improving data quality and reporting, and enhancing climate risk modeling. AI has exciting potential to improve data center energy efficiency, by using intelligent workload management to balance computing demand, and applying predictive analytics to optimize cooling systems. One of the many potential positive impacts of AI is to help lead the energy transition, producing a step change through smart grids, storage, predictive maintenance and carbon capture.

## Sustainability as a value driver

Can sustainability be viewed as something more than a compliance and reporting issue? One-quarter of technology and telecommunications CEOs (25 percent) say their organizations comprehensively integrate sustainability costs and ROI into every major capital decision, and a further 40 percent do this for "some" capital decisions. Given the importance of electricity to this sector, and the shortage of investment capital, measuring returns on their outlay in sustainability should be a high priority for every organization, to demonstrate that they are delivering value.

> "Generative AI is fundamentally reshaping the technology and telecommunications sector, demanding that leaders balance bold innovation with responsible implementation. Success will be defined not just by the adoption of new technology, but by the strategic investment in the people and governance needed to navigate the risks and unlock AI's full potential."

**Chad Seiler**
Line of Business Leader, Technology, Media & Telecommunications
KPMG US

# The journey ahead

How can technology and telecommunications CEOs continue to guide their companies through choppy waters, to realize their growth ambitions?

## AI-powered technological innovation

### Take an enterprise-wide view of AI

To harness the full potential of AI, companies should move away from individual, siloed pilots to a structured yet flexible framework for navigating the complexities of AI adoption. This helps balance the need for short-term efficiency gains with the imperative to prepare for future growth and innovation.

### Invest in AI governance

With the right governance in their organizations, companies can innovate at pace via ethical and responsible AI applications. AI governance platforms provide tools for monitoring, auditing, and ensuring compliance to address bias, uphold data privacy, and enhance transparency, which can help maintain stakeholder trust. Companies need to ensure that employees understand which type of data they can use, with processes for checking AI bias — while also providing freedom to take risks and innovate.

## Tuning the workforce into an AI world

### Create a compelling AI vision

A clear and exciting picture of the possibilities of AI can help enthuse employees and reduce fear. This is important not only for embedding AI into the organization but also to enhance the customer and the employee experiences. Companies should consider the appropriate balance of humans and AI, to rethink roles that make the most of technology, while giving people opportunities to build knowledge and forge interesting careers.

### Invest in lifelong learning and encourage critical thinking

An effective workforce is dependent upon employees who are curious about the possibilities of AI, and can learn and experiment without fear. A learning culture can inspire ambitious younger recruits and longer-serving employees to use AI and other technologies with confidence. One of the most valuable characteristics to nurture is curiosity, to push the boundaries of what's possible, experiment and take measured risks.

## Achieving strategic advantage through ESG

### Size the sustainability value opportunity

Look beyond compliance to assess ROI in energy-efficiency, circularity (to preserve rare earth minerals and other hard-to-find materials), supply chain agility and reliable energy sources. A robust business case can give companies more predictable revenue forecasts and keep costs under control.

### Make regulatory compliance a core capability

Technology and telecommunications executives should keep up to date with regulatory developments, assessing the implications on their operations. This should enable their businesses to anticipate and respond to new regulations and adapt products, supply chains and manufacturing.

# Methodology

The 11th edition of the KPMG CEO Outlook, conducted with

## 1,350 CEOs

between 5 August and 10 September 2025, provides unique insight into the mindset, strategies and planning tactics of CEOs.

This report focuses exclusively on the

## 230 technology and telecommunications company CEOs

surveyed — 120 from technology companies and 110 from telecommunications companies — with comparisons between these two subsectors noted where relevant.

Where year-over-year comparisons are made (e.g., 2024 vs 2025), the data is drawn from equivalent questions in previous editions of the KPMG CEO Outlook survey. While the technology and telecommunications company sample size and composition are broadly consistent, minor variations may affect comparability.

All respondents oversee companies with annual revenues over US$500M and a third of the companies surveyed have more than US$10B in annual revenue. The complete survey included CEOs from 11 key markets (Australia, Canada, China, France, Germany, India, Italy, Japan, Spain, UK and US) and 12 key industry sectors (asset management, automotive, banking, consumer and retail, energy, infrastructure, healthcare, insurance, life sciences, manufacturing, technology, and telecommunications).

*NOTE: Some figures may not add up to 100 percent due to rounding.*

# How KPMG can help

From startups to Fortune 500 companies, technology and telecommunications companies worldwide aim to secure their market position through disruptive innovation. As new technologies are adopted around the world, the leaders are those who understand and address the complexity and business transformation impact of rolling out new products and services. KPMG can help.

KPMG's technology and telecommunications sector professionals understand today's changing and challenging environment. Our network combines industry knowledge with technical experience to provide insights that help leaders transform and simplify their complex business models.

With a keen understanding of the changing marketplace, our professionals go beyond today's challenges to anticipate the potential long- and short-term consequences of shifting business, as well as financial and technology strategies. We also work with clients to explore potential obstacles to change and collaborate on critical decisions that can help deliver real value to their businesses.

## Accolades

KPMG is honored to be positioned as a Leader in the 2025 IDC MarketScape for Worldwide AI Services AND receive the IDC 2024 Customer Satisfaction Award for Enterprise Intelligence Services.

This study assesses the strategies and capabilities of 20 vendors who have established themselves as trusted providers across the full life cycle of AI services, with the ability to assist clients both to establish AI-fueled business plans and to transition to AI-ready technology operating models.

## Explore KPMG's AI services

Build an effective AI strategy to deploy AI and deliver value at scale. Discover how KPMG AI Strategy can help you build an effective AI adoption strategy with technology solutions that are designed to support your entire business transformation journey.

# Contact us

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