KPMG Global tech report 2026

Leading in the Intelligence Age:
Excelling today, shaping tomorrow

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Contents

03 Foreword

04 About the research

06 Meeting the challenge of the Intelligence Age

11 Realizing value from tech investment

15 Building adaptive strategies amid continual disruption

20 The foundations for the next wave

24 Luminary spotlight

26 Conclusion and key recommendations

Foreword

We stand at the threshold of the Intelligence Age, a period defined by an unprecedented pace of innovation and profound uncertainty, where technology is no longer just a tool, but a force reshaping the very fabric of business and society. Artificial Intelligence (AI) is rewriting the rules of competition, quantum breakthroughs loom on the horizon, and geopolitical uncertainty adds another layer of complexity. The forces shaping our world are leaving organizations and individuals grappling with what comes next. Predictions range from dystopian visions of a jobless future and a share market implosion to dismissals of AI as mere hype. Amid this dissonance, reasoned analysis is important.

This report cuts through the speculation by grounding insights in data collected from 2,500 tech executives worldwide. Our research shows that organizations are moving beyond the early phase of 'AI roulette', placing scattered bets on multiple technologies, and are now embedding AI into workflows and offerings, striving to scale investments.

Yet, scaling is complex. Consistent with our last report, technical debt, organizational silos, and talent shortages remain stubborn barriers. Despite these challenges, optimism runs high. Half of tech executives expect to reach top maturity by 2026, but only 11 percent are there today. In this report we explore if ambition can match reality and whether in parallel to delivering on today's agenda, organizations can maintain an eye on the next wave of tech innovation.

The return on investment (ROI) picture is equally nuanced. Adoption is rapid, but returns vary widely, shaped by factors that include diligent governance, execution discipline, and organizational agility. Against this backdrop, static planning is becoming obsolete. To thrive, organizations need adaptive strategies that embrace flexibility and speed.

Building a culture that welcomes change is critical, though fears about job security persist. Encouragingly, most organizations anticipate only modest reductions in permanent human roles over the next 2 years, and high performers emphasize investing in people alongside AI innovation. Despite some extreme predictions, perhaps there is hope for a future where technology augments rather than replaces human potential.

As you read this report, I encourage you to reflect on the question: Can we thrive amid disruption? The answer I believe lies in rejecting hype, embracing evidence, and committing to strategies that balance ambition with rational thinking.

Guy Holland
Global Leader,
CIO Center of Excellence
KPMG International

Guy Holland is the global leader of KPMG International's CIO Center of Excellence, a board member of KPMG Australia, and he leads KPMG Australia's Commercial Office. Guy's career in technology spans over 30 years and he has worked in senior leadership roles for global consulting and technology companies in Europe and ASPAC. Working with senior business leaders and C-suite executives, he helps organizations across a wide range of industries to harness technology and data to transform, innovate and create business advantage.

About the research

This study is based on a survey of:

2,500 tech executives from 27 countries

43%
Europe, Middle East and Africa (EMEA)

29%
Asia-Pacific (ASPAC)

28%
Americas

The tech executives are representatives from **eight industries**: automotive, consumer and retail, energy, financial services, government, healthcare and life sciences, industrial manufacturing, and tech and telecom.

31%
Financial Services

11%
Technology and telecom

10%
Consumer and retail

10%
Industrial manufacturing

10%
Healthcare and life sciences

10%
Energy

10%
Automotive

8%
Government

This is our 2026 KPMG Global tech report. Research was conducted in 2025, but with the rate of technological advancement rapidly increasing, we have expanded the view of the report from observing recent progress to exploring predictions for 2026 and beyond.

The breakdown of respondents is as follows:

50%
Members of the C-suite

10%
Vice President

31%
Director

9%
Senior Manager

This report includes valuable insights from interviews with eight senior corporate leaders and professionals.

These participants were:

Dean Bortz
Director, AI Go-To-Market, Google

Rohit Gupta
Founder and CEO, Auditoria.AI

Zack Kass
Global AI advisor, thought leader, and former Head of Go-To-Market, OpenAI

Phil Mottram
Executive Vice President and Chief Sales Officer, HPE

Seth Patton
General Manager, Product Marketing, Microsoft 365 Copilot

Noelle Russell
AI Solutions Architect and Strategic Advisor, CEO, AI Leadership Institute

Umesh Sachdev
Co-founder and CEO, Uniphore

Jenny Wood
Group Chief Information Officer, Skipton Group

Annual revenues for all organizations in our survey are above US$100 million.

Meet the high performers

In our research, there is a group of organizations that consistently outperform. Represented by just five percent of the tech executives we surveyed, they stand out for their advanced implementation across core technologies, mature operational practices and ability to generate significant returns on their digital tech investments.

This year, we define high performers using three key dimensions:

Tech maturity

In one of the top two maturity stages in at least five of the 10 technology categories measured

Process maturity

At the highest level of maturity in at least five of the 10 technology functions measured

Value

Reported a 200 percent or more return on investment related to digital technologies[1]

[1] Respondents estimated their organizations' typical annual investments in digital technologies and the return on investment (ROI) achieved in the past year, answering within monetary ranges. ROI was defined as direct revenues as well as cost savings, efficiency gains, productivity improvements and reductions in risk. This refers to historical benefits over the past 12 months and excludes any future expected benefits.

Meeting the challenge of the Intelligence Age

A powerful new era of tech

The Intelligence Age is fueled by the exponential acceleration of new technologies. Humans are gaining not only unprecedented access to information, but also the technology that helps them reason, decide and act with speed, and scale.

Seth Patton, General Manager, Product Marketing, Microsoft 365 Copilot, says that there is simply no comparison between the steady evolution of the printing press, photography and even the internet with what is happening today. "The difference this time is the accelerated speed we're seeing in the mainstream adoption of tech across the board, in people's personal lives and in the business world," he says.

This acceleration is abundantly clear with AI. Models are updated and new products released continuously, and capability per dollar keeps growing. Software companies are embedding AI agents into organizational platforms, while subscription-based services are making adoption of advanced capabilities frictionless.

This era is defined not only by technological advancement but by the unprecedented opportunities it creates for us to reimagine what technology can achieve and how we can collaborate to unlock new possibilities. Zack Kass, global AI advisor and former Head of Go-To-Market, OpenAI, says, "The future will not be defined by what machines can do. It will be defined by what we want machines to do."

The Intelligence Age is also about mass participation. As Patton observes, this era will move us from "centuries of democratizing information to instead democratizing expertise."

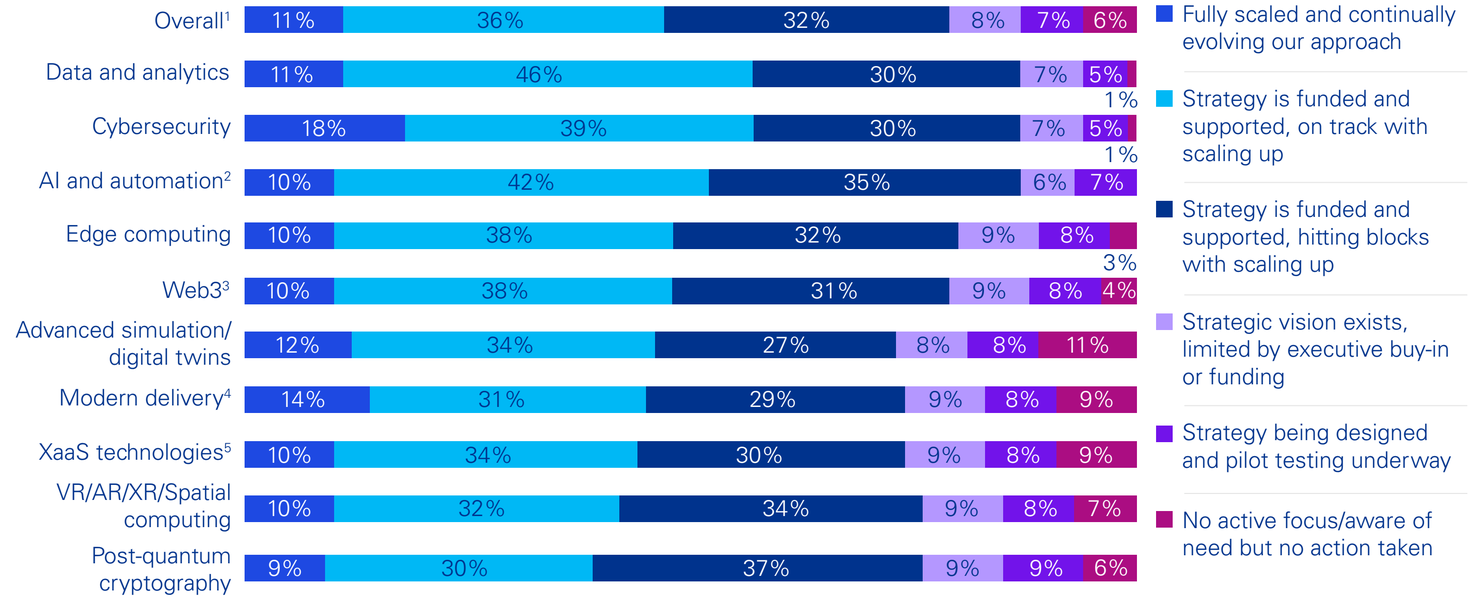
Current levels of tech maturity

As tech leaders navigate the Intelligence Age, a key challenge is reaching and maintaining tech maturity in an ever-changing landscape.

Figure 1 shows our respondents' levels of maturity across 10 technology categories, such as cybersecurity, XaaS, or data and analytics. When averaged out, 79 percent of organizations are in one of the top three maturity stages.

Figure 1: Tech maturity in 2025

How would you describe your organization's maturity today in each of the following areas?



1. Average across all technology areas for 2025; 2. Includes generative AI and agentic AI; 3. Includes blockchain and tokenization; 4. Includes Agile, DevOps and low-code/no-code; 5. Includes public cloud or multi-cloud

Across the categories, our research revealed that:

- 11 percent of organizations are fully scaled and are focusing on continuous improvement.
- 36 percent have their strategies funded and supported and they are on track with scaling up.
- 32 percent have secured funding for their strategies, but they are facing roadblocks on the path to implementation.

The categories that were most likely to be fully scaled were cybersecurity at 18 percent, and modern delivery (including Agile, DevOps, low-code/no-code at 14 percent.)

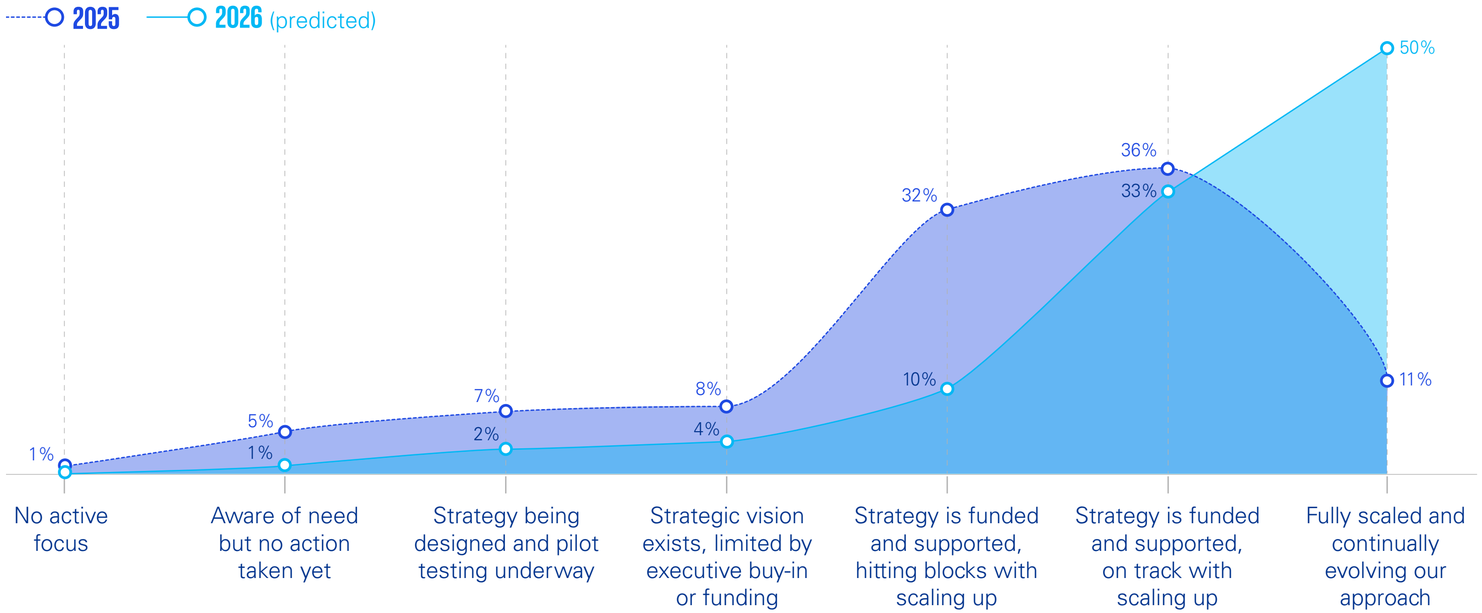
Preparing for a leap in tech maturity

The number of organizations in one of the top three maturity stages rises to 93 percent when respondents describe their maturity expectations in 12 months' time. This growth is even greater when considering just the top two maturity stages (from 47 percent to 83 percent).

Ambitious leaps in tech maturity are expected by many organizations in 2026. Figure 2 shows that across the 10 technologies measured, 50 percent of respondents expect to reach the top stage of maturity by the end of 2026, despite only 11 percent rating themselves at that level today.

Figure 2: Level of tech maturity today and predictions for 2026

How would you describe your organization's position in 2025 and in 12 months' time? (Average shown across the 10 technologies)

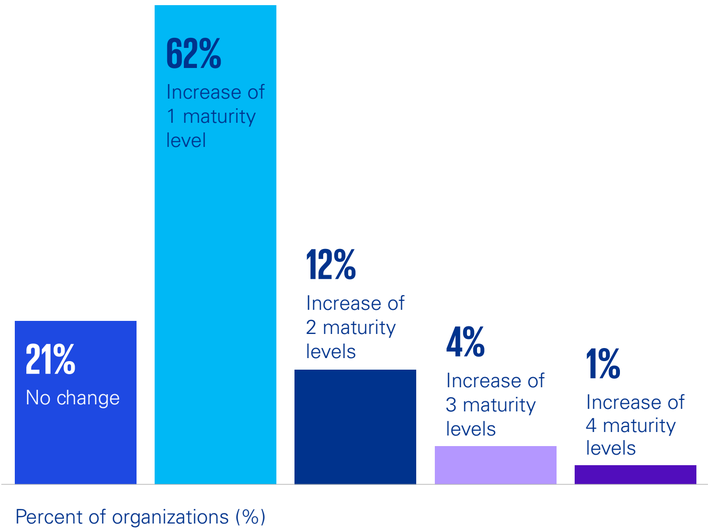


As Figure 3 shows, the majority (62 percent) of organizations believe they will improve by one maturity level in 2026, 21 percent believe they will retain their current maturity level, and 17 percent believe they will move up by at least two maturity levels.

While these ambitious projections are encouraging, they raise the question: Can organizations realistically achieve such significant advancements in just 1 year? The answer will depend on their ability to overcome a number of key execution challenges.

Figure 3: Anticipated change in tech maturity — 2025 to 2026

How would you describe your organization's position in 2025 and in 12 months' time? (Average across the 10 technologies)



Managing skills shortages and tech debt

Bringing ambitious tech maturity plans to life requires the right skills within the organization, and in this area, there are some hurdles to overcome. Just over half of organizations surveyed (53 percent) still lack the talent needed to bring their digital transformation plans to life. Skill gaps that were manageable during pilot phases pose a greater risk as organizations move to full-scale implementation.

Further, as highlighted in our last report, in the pursuit of speed, earlier trade-offs are still catching up with organizations, creating tech debt. The majority (69 percent) of tech executives say that in trying to move fast and keep costs down, their tech programs make trade-offs in areas like security, scalability, and data standardization. The majority (63 percent) agree that the cost of fixing tech debt is holding back their progress with new initiatives.

The results also indicate that some organizations risk underestimating the threat of tech debt. For example, those who say the cost of fixing tech debt frequently prevents them from investing in new tech programs expect to make bigger leaps forward in tech maturity in the next 12 months, compared to those who say this hardly ever, or never, occurs at their organization.

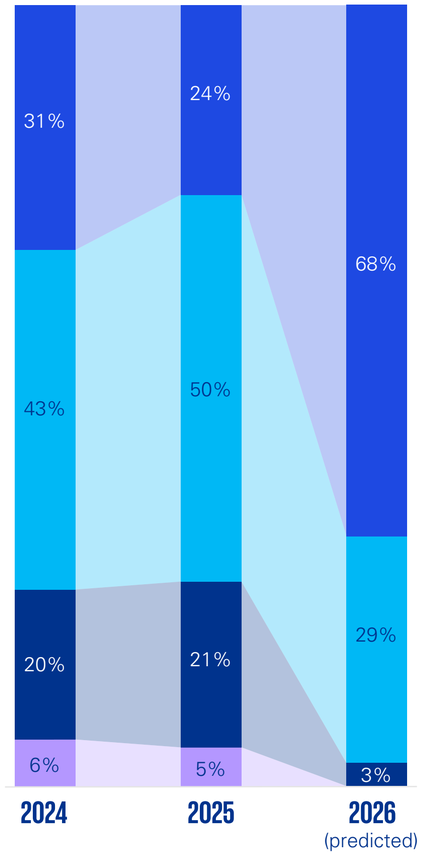
Shifting from experimentation to scale

Keeping a step ahead in the Intelligence Age also means accelerating AI adoption. In our last report, AI adoption was primarily focused on enabling experimentation with generic tools. Now, the challenge is scaling it.

However, as Figure 4 shows, there has been a 7-percentage-point decline compared to our previous survey in the share of organizations successfully deploying AI use cases into production at scale and realizing ROI across multiple use cases. Despite this setback, many tech executives continue to forecast exponential gains in AI maturity: Sixty-eight percent expect to reach the highest level of AI adoption by the end of 2026.

Figure 4: Organizations expect their AI adoption maturity to rapidly advance in 2026

Which of the following best describes your current level of AI adoption, and where do you expect it to be in 12 months' time?



- Innovating and deploying AI use cases into production at scale, delivering ROI across multiple use cases
- Strategic investment in core business capabilities, some AI use cases running actively across the organization that are returning business value
- Multiple AI proof-of-concept tests running, limited number of ad hoc use cases in production, but ROI not achieved yet
- Limited number of AI proof-of-concept tests running, some use cases identified

Findings indicate significant optimism on AI

In our survey,

69%

of early adopters and

65%

of slow followers expect to scale AI into production and achieve ROI across multiple use cases by 2026.

How to emulate the high performers

Address issues with tech debt

8 percent of high performers say the cost of fixing tech debt frequently prevents them from making investments in new tech programs, compared with 45 percent of the rest. The tip here is to invest in resolving underlying tech debt, thereby lowering spending on maintenance and moving forward with investments that deliver maturity improvements.

Innovate while maintaining strong cost management discipline

6 percent of high performers report they frequently miss opportunities to invest more in new and emerging technologies due to cost pressures, or tech debt, compared to 44 percent of the rest.

Avoid compromising on core investments

30 percent of high performers report that in trying to move fast and keep costs down, their tech programs compromise on areas like security, scalability, and data standardization, versus 71 percent of the rest.

Realizing value from tech investment

ROI follows a pattern

While tech is about enablement, it is also about delivering return on investment. However, in the Intelligence Age, with so many new tools, competing priorities, and potential strategies, measuring, predicting, and communicating ROI can be complex.

The good news is that tech executives in our survey reported that the average tech ROI stands at 200 percent (2x), however the spectrum of returns is broad, shaped by several contextual variables. Higher investment does not guarantee better returns. Instead, outcomes are shaped by a combination of readiness, governance, agility, and execution discipline.

The responses also demonstrated that returns on tech investment are not linear. Rather than a single investment 'sweet spot', there were some clear ROI 'zones':

- **In early stages of maturity,** smaller, focused investments generate higher rates of return, reflecting a 'quick-win zone'.
- **As the complexity of implementation rises,** returns tend to slow due to factors such as an increase in integration effort and navigating technical debt. Half (51 percent) of tech executives admit that legacy processes often contribute to poor ROI on tech investments.
- **As maturity improves across the board,** and organizations gain clearer insight into high value opportunities, ROI begins to accelerate again.

This pattern is exemplified by high performers, who appear to have successfully navigated this arc. They show high ROI (4.5x), even with lower investment levels relative to revenue, suggesting they have passed through early transformation phases and are now reaping the benefits of prior investment.

An analysis of the organizations reporting high-value return reveals some notable trends:

Smaller organizations

Smaller organizations achieve 3.6x ROI and typically invest more relative to revenue. Typically, these organizations have fewer silos, simpler ecosystems, lean governance, and streamlined approvals.

3.6x ROI

Early adopters

Early adopters of new tech invest less but gain more, achieving 2.2x ROI compared with 1.4x ROI for late adopters. This suggests they benefit from more time to learn and refine their approach.

2.2x ROI

Organizations with fewer cost pressures

Organizations with fewer cost pressures report a higher average ROI of 2.6x. Fewer barriers to investing in new tech may allow these organizations to harness more opportunities.

2.6x ROI

Transformation-focused organizations

Those who expected to spend 50 percent or more of their tech budgets on transformation in 2025 report high ROI (3.2x) despite lower relative investment. In part, this probably reflects payoff from previous investments.

3.2x ROI

ROI was defined as direct revenues as well as cost savings, efficiency gains, productivity improvements and reductions in risk gained over the past 12 months.

New measures for AI ROI

A key area where organizations find predicting and measuring tech ROI complex is new AI tools and platforms. While most organizations (74 percent) report that their AI use cases are providing business value, only 24 percent say they are achieving ROI across multiple use cases, a 7-percentage point decline from our last survey.

One of the challenges is that for AI projects, traditional measures of ROI are not sufficient, and 58 percent of organizations acknowledge this. Rohit Gupta, founder and CEO of finance automation software provider Auditoria.AI says there are some standard measures, while others could be quite unexpected.

"As much as we can help organizations build a business case around efficiency gains, productivity aims, resource reallocations, and cost savings, we do have to expose them to other vectors such as fraud and risk mitigation or accelerated cash flow, that they may or may not have thought of," he says.

Without KPIs tailored to the realities of AI, including metrics for indirect value, holistic impact, and longer-term returns, organizations struggle to communicate progress and success. In fact, 55 percent of tech executives say they struggle to demonstrate the value of AI to both stakeholders and shareholders.

Phil Mottram, Executive Vice President and Chief Sales Officer, HPE, says the ability to report to leadership must be factored in when setting KPIs.

"It's important to be very focused in terms of how you're using AI and tracking its benefits, because you need to make sure it really is delivering in line with a business case rather than being a broad-brush approach," he says.

> **"Is incremental improvement acceptable in your business? If so, simple AI solutions — like out of the box tools — are sufficient. If you're faced with daunting business challenges that require step-function improvements…that's where you should aim your resources at reinventing the wheel."**
>
> **Zack Kass**
> **Global AI advisor and former Head of Go-To-Market, OpenAI**

Strategic clarity to support AI ROI

Driving ROI from AI requires strategic clarity and good communication on how AI is being advanced across the organization. While 80 percent of C-suite leaders report having a clear organizational-wide AI strategy, only 68 percent of senior tech managers agree. This suggests there are gaps in alignment and understanding that could hinder execution.

Mottram says, "Some companies have worked out what works for them, and embedded AI into their way of doing business, but many organizations are still struggling to find what are the real use cases for them, and how's it going to make a big difference to how they operate."

Umesh Sachdev, CEO and co-founder of business AI and data platform, Uniphore, says that once AI value is demonstrated in one area of the organization, other departments, if aware, will likely champion their own use cases.

He saw this firsthand when supporting a consulting business that started with an AI use case for invoice generation.

"Within six weeks, AI agents were created and deployed, and the throughput of the team was increased by five to six times. We then saw 20 to 30 more departments from the same consulting business come to us and start to build agents in the next three months," he says.

55% of tech executives struggle to demonstrate and communicate the value of AI to stakeholders and shareholders

How to emulate the high performers

Focus on ROI

High ROI (4.5x) characterizes high performers, who achieve this return even with lower investment relative to revenue, versus an average ROI of 2x for the rest; our data indicates they have stronger foundations that let them leverage funding more effectively to amplify returns.

Demonstrate value to the C-suite

13 percent of the high performers report that they have been unable to secure adequate business sponsorship to support their tech programs, compared with 60 percent of the rest. Our data suggests they have identified how to both quantify and prove the value of their tech and AI investments.

Communicate value to a broad range of stakeholders

17 percent of the high performers struggle to communicate the value of AI to stakeholders such as business leaders and shareholders, compared with 57 percent of the rest. This enhanced understanding is important for engagement and support along the maturity journey.

Building adaptive strategies amid continual disruption

Tech plans quickly become obsolete

The Intelligence Age is marked by continual disruption. Often technology strategies become obsolete before they are even implemented, as the tech landscape evolves and better options appear. Our survey indicates that tech executives experience this, with 56 percent reporting that their tech plans quickly become outdated because of rapid change. Just 16 percent of high performers say the same, suggesting they are more prepared for this environment.

Continual disruption underscores the need for organizations to adopt technology in ways that are adaptive and responsive. However, most (78 percent) still rely on established processes when evaluating and adopting emerging technologies. It is essential to review whether these methods remain fit for purpose, or if greater agility and speed are now required.

Balancing and targeting the portfolio of investment

A key ingredient in being adaptive amid disruption is striking the right balance of investment across the whole portfolio of technology in the organization, and being ready to shift that balance swiftly when the need arises.

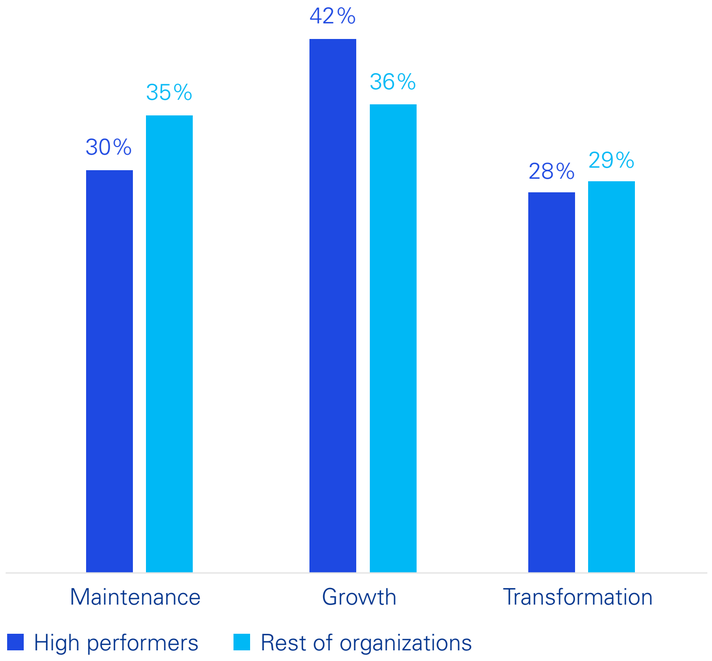
Currently, as Figure 5 shows, tech investment is spread relatively evenly across:

- **Maintenance,** 35 percent
- **Growth** (incremental improvements to systems and workflows), 36 percent
- **Transformation** (radical overhauls of business models and processes), 29 percent

While investment is evenly distributed it is notable that high-performing organizations tilt a higher proportion of their tech budget toward growth, at 42 percent. Typically, they are more advanced on their tech maturity journeys and less focused on maintenance, pointing to better discipline around the management of tech debt.

Figure 5: High performers prioritize growth over maintenance

Approximately how much of your tech budget for 2025 is allocated to the following types of tech initiatives?



Defining a clear approach to tech decision-making

Adaptive strategies work best when there is clarity over where decisions are being made. Without this, decision making can be too slow and dispersed, and can lead to an overload of tech projects. For example, our research found that 32 percent of respondents have too many disconnected AI projects and teams at their organization, with limited coordination or shared governance.

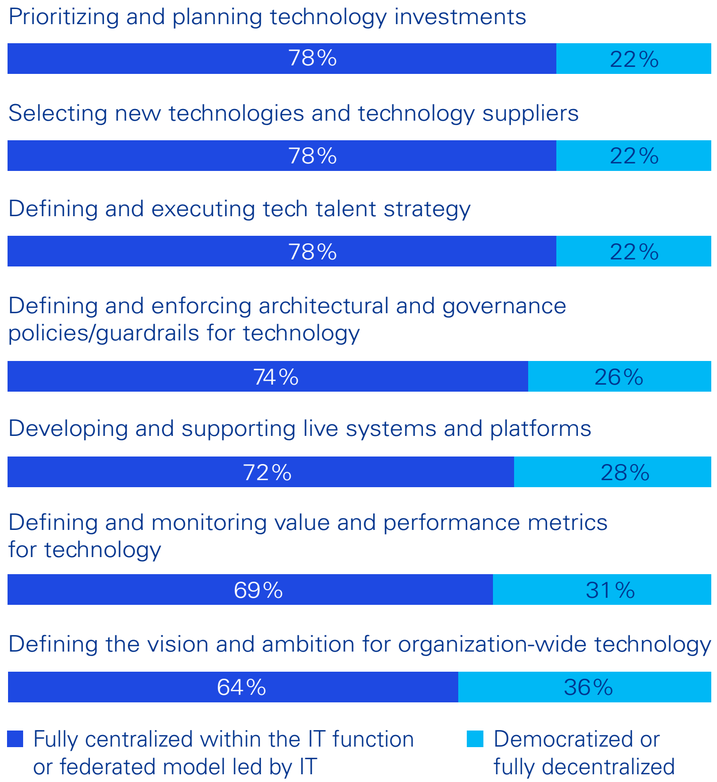
One of the tactics for preventing this in pursuit of greater alignment is centralizing selected decision-making processes. Figure 6 on the next page shows that one of the activities most likely to be fully centralized within the IT function or in a federated model led by IT is prioritizing and planning technology investments (78 percent). The least likely to have this approach, yet still undertaken by close to two-thirds of respondents (64 percent), is defining the vision and ambition for organization-wide technology.

Centralization is certainly preferred by the high performers, with 91 percent reporting that they conduct tech investment prioritization and planning either fully centrally within their IT function, or through a federated model led by IT.

While these results indicate a clear preference for more centralized decision-making, organizations should remember that one size does not fit all. A hybrid approach combining several models tailored to the complexity of each decision and organizational maturity can deliver the best results.

Figure 6: Levels of centralized decision-making across major activity groups

Who is responsible for the following tech-related decisions and activities within your organization?



Building a culture that leverages the best of technology

For an adaptive strategy to work, culture is another key ingredient, as people need to be supportive and capable of regular and rapid change. However, it is common for the workforce to fear new technology and what it may do to their roles and futures, which can stifle agility.

Dean Bortz, Director of AI Go-To-Market, Google, says: "You're going to get a portion of the enterprise that just starts adopting it naturally because they're curious and they want to. But 90 percent of your organization is going to need some sort of enablement and training to understand how the tools work."

Therefore, leadership needs to frame technology as an enabler, and give employees the agency to validate the opportunities for themselves. One effective approach is to establish small, cross-functional teams with the autonomy to innovate and drive change. Another is to focus on centers of excellence, where diverse working groups from different functions can conduct controlled experiments together, develop best practices, and provide support and training for specific areas. Almost a third (31 percent) of tech executives say they are planning to increase investment in centers of excellence in the next year.

> **"We're creating an operating model change that puts more control into the hands of people, in terms of the things that they need to do and learn. We're doing work on culture, around how we drive curiosity, how we drive accountability, how we drive bravery."**
>
> **Jenny Wood**
> **Group CIO, Skipton Group**

Strong data foundations for adaptability

Strong data foundations are essential for adaptive tech strategies, giving decision makers the right information at the right times. Figure 7 shows the key data and analytics improvement areas that tech executives plan to prioritize to reach their strategic goals. Notably, data analysis and insights, and data-powered forecasting have grown in priority from our last report, showing the value organizations are placing on empowering employees to make data-driven decisions.

To help ensure data gets where it needs to go, organizations need to eliminate silos, standardize data models, and deploy platforms for seamless sharing.

The ability to adapt is also enhanced by using real-time data and external intelligence for forecasting and scenario planning. Yet, 67 percent of tech executives say ineffective forecasting hampers their ability to respond to market shocks and tech shifts. Meanwhile, 59 percent of high performers plan to improve data flows and tech infrastructure to bolster their scenario planning and decision-making agility in the next year, compared with 41 percent of the rest. Technologies like digital twin can take this further by simulating real-time environments and modeling scenarios to support smarter decisions. In fact, 78 percent of organizations aim to be scaling up or fully scaled in advanced simulation and digital twin by 2026.

Foundations of resilience and security

Adaptive strategies also need to be underpinned by a deep focus on resilience and security. The high performers in our survey report being more resilient to changing variables, with only 33 percent frequently impacted by market, regulatory or technology shifts, compared to 65 percent of the rest. Further, 70 percent of high performers report themselves to be highly resilient to change, compared to 36 percent of the rest.

Figure 7: Priority data and analytics improvement areas over the next 12 months

Which of the following data and analytics improvement areas will be most critical for your organization to achieve its strategic goals over the next 12 months? (Respondents ranked their top three choices)

Other categories provided in the survey, though not ranked within the top four by respondents, included: data governance, data investments, data interoperability, data monetization, data culture, and data literacy.

How to emulate the high performers

Ensure a unified AI program

2 percent of high performers say there are too many disconnected AI projects and teams with limited coordination or governance at their organization, compared with 34 percent of the rest. This suggests that their leadership has built a cohesive plan for AI implementation and adoption, aligning strategy, culture and capabilities around a clear understanding of how AI can create value.

Consider centrally guided decision making

91 percent of high performers ensure that prioritizing and planning technology investments is centralized in terms of decision making compared to 78 percent of the rest.

Take people on the change journey

6 percent of high performers say some of their employees feel left behind in the ever-changing tech landscape, compared with 39 percent of the rest. This suggests they foster cultures that embrace innovation, and where employees feel informed and encouraged to support tech adoption.

The foundations for the next wave

Amid the agentic AI boom

The Intelligence Age is opening a new frontier of possibilities, and one opportunity that is currently demanding attention is the potential of agentic AI to transform operations. In fact, 88 percent say they are already investing in building agentic AI into their systems, and 92 percent report that managing AI agents will become an important skill within the next five years.

Agentic AI will likely only be successful when implemented with the right foundations. One of these is determining what tasks the agents will perform, and what role humans will play 'in the loop'. Figure 8 illustrates that tech executives anticipate digital assistants will make up 36 percent of core technology teams in the next two years, representing an eight percentage-point increase by 2027. This change is expected to be supported by moderate declines in contractor and permanent roles.

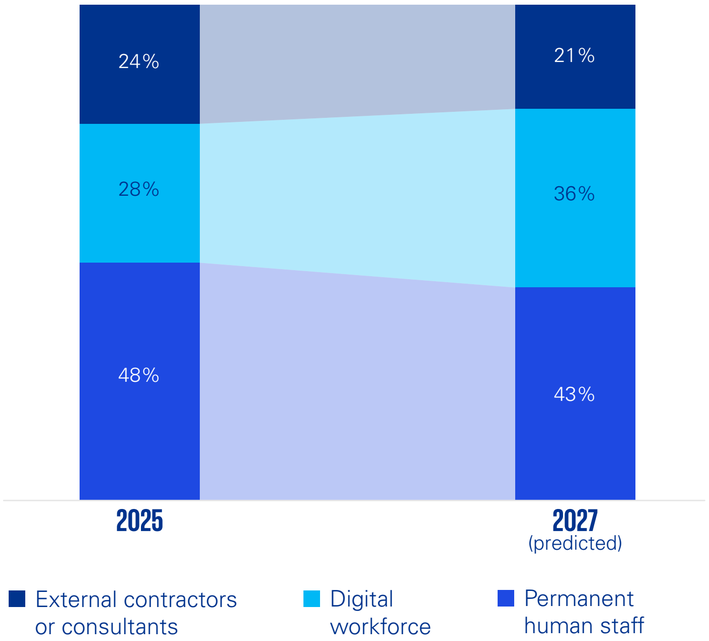
Gupta says just like organizations have a HR database for people, they will need to build one for AI agents. "We are already seeing job descriptions out there which say that the person will have to manage agents," he says. For Bortz, the likelihood is that every person will have to manage their own army of agents. "And they'll have to work on how they interact with one another and the business, and move beyond the traditional business roles of CIO or CHRO," he says.

To optimize human-AI collaboration and increase adaptability, Kass recommends moving toward smaller teams and flatter structures for more agility. "Play smaller, and you can be more forward-looking," he says. Patton adds that the real value from agentic AI comes when the focus moves beyond individual productivity to a broader shift. "More than anything, the question is, do you have the courage to fundamentally change how your organization operates because of AI?" he says.

Jenny Wood, Group CIO, Skipton Group, says this more holistic level of change requires the willingness to think outside of the box and do things in a different way. "For me, that's the thing we're curious about, which is what's the different way and how do we enable our people to get to that different way, as opposed to just doing the same things they were already doing but faster?" she says.

Figure 8: Workforce profile - now versus two years' time

Please estimate the percentage of your core tech team's full-time equivalent (FTE) capacity from each source now, and in 2 years' time



> **"Companies that learn to use AI and AI agents and all these architectures effectively are likely to leave their peer groups behind, and right now that is coming down to the leadership of companies and departments and teams."**
>
> **Umesh Sachdev**
> **Co-founder and CEO, Uniphore**

AI partnerships for knowledge and scale

As agentic AI and other new technologies emerge, tech leaders need to accelerate learning through collaboration. Patton says with so much coming down the pipeline, no one can keep ahead of this alone, and this is where the right partners will matter. "By definition, to be successful, you have to rely on partners. That's true at every organization, it's true at Microsoft," he says.

Tech executives are clearly onto this need, with 90 percent planning to expand and strengthen their tech ecosystem and partnerships so they have access to the required expertise.

*To find out how agentic AI can unlock value, visit **here**.*

> **Pick the areas that you want to keep in-house for domain expertise, then choose trusted partners to fill in the gaps across your portfolio."**
>
> **Noelle Russell**
> **AI Solutions Architect and Strategic Advisor**

Prioritizing governance and ethics in partnerships

As organizations partner up and scale, a key thing to observe is the governance and ethical standards of partners. This year, tech executives rank security concerns, and intellectual property and data protection concerns, in their top five barriers to greater collaboration between organizations on emerging technologies. One third (36 percent) of organizations are planning to enhance data sovereignty audits across their partnership ecosystems.

To help further, new tools and methodologies are emerging to help organizations assess and mitigate risks. An example of this is HELM[1] (Holistic Evaluation of Language Models): an open academic framework to measure the quality, safety and bias of Large Language Models.

Russell encourages organizations to adopt these types of model evaluation frameworks, noting that companies like Microsoft, Amazon, and NVIDIA have integrated leaderboards that visualize these evaluations within their developer tools. "Paying attention to what you build means applying rigor and discipline to every model you select," says Russell.

Beyond agentic AI: Preparing for even more intelligence

While focusing on agentic AI, organizations must also prepare for a multitude of new tech and tools, including quantum computing, Artificial General Intelligence (AGI), and Artificial Superintelligence (ASI), which will continue to have fundamental impacts. These advances call for strategic foresight, ethical frameworks, and preparing workforces that are skilled and adaptable, with a willingness to work and think in different ways.

Artificial General Intelligence (AGI) and Artificial Superintelligence (ASI)

Today's AI systems are powerful yet narrow, excelling at well-defined tasks within bounded contexts. They are reactive, not reflective. But AGI and ASI will likely usher in a reality where digital intelligence may exceed the cognitive performance of humans in virtually all domains of interest.

AGI represents a step-change. Unlike narrow AI, AGI is expected to possess the ability to master any intellectual task a human can, transferring knowledge across domains and adapting its behavior over time. It would not just respond to inputs, it would understand context, plan, reason and learn with autonomy. Imagine a system that can not only write an essay, but also understand geopolitics and design a new biotech drug, without having to be retrained for each task.

ASI will likely sit beyond that threshold. It may be defined not only by broader generalization, but by being able to surpass the best of human cognition in every meaningful domain, from scientific reasoning to moral judgment to emotional insight.

While the timeline to AGI and ASI remains uncertain, the trajectory is not in question. Systems are becoming more autonomous, more transferable and more capable of iterative self-improvement.

These trends call for strategic foresight, ethical frameworks and a rethinking of how intelligence itself integrates with society, economics and human purpose.

Leaders must consider how to position their organization to not just adapt, but to lead responsibly in a world where machine intelligence becomes a core driver of value, strategy and societal progress.

*To find out more about AGI and ASI, visit **here**.*

Quantum computing

Although it is unclear when stable, functional quantum computers will be available, the technology is rapidly advancing. Quantum has the potential to significantly accelerate AI model training, expediting development cycles to create more robust problem-solving capabilities.

However, quantum also presents new security threats, such as breaking through encryption, which are already on tech executives' minds. Forty-one percent say they are worried that they are falling behind in their preparation for the threats posed by quantum computing and their implementation of post-quantum cryptography (PQC). HPE's Phil Mottram reflects this sentiment and says, "People are already worried about quantum being used by bad actors in the security space. The server products that we ship today have already been future-proofed against quantum security threats."

Organizations should identify what encryption is used, where and for what purpose, and develop a transition plan for PQC. Beyond security measures, they should also start planning for the logistical side of quantum arriving at their organization. This will likely constitute a vast transformation project across both coding and hardware.

*To find out more about data safety in the quantum computing age, visit **here**.*

[1] Stanford Institute for Human-Centered Artificial Intelligence (HAI) 2025

How to emulate the high performers

Invest in people

50 percent of permanent human staff are expected to remain in place by 2027 among high-performers, versus 42 percent for other organizations, despite the rapid adoption of agentic AI, highlighting the continued value of human expertise alongside AI-driven capabilities.

Be deliberate with hiring skills

57 percent of high performers plan to increase hiring of onshore technology talent over the next 12 months (in response to external macro-environment changes such as geopolitical tensions) versus 35 percent of the rest.

Prioritize collaboration and security

85 percent of high performers collaborate frequently with external partners in tech ecosystems, compared with 73 percent of the rest. However, nearly half of high performers (49 percent), versus 35 percent of others, plan to enhance data sovereignty audits across their partnership ecosystems. They are also 21 percentage points more likely to increase scrutiny of the geographic location of their cybersecurity partners over the next year.

Be bold in the face of risk

87 percent of high performers are more likely to agree that they should take more risks on emerging technologies to stay relevant in their industry, compared to the rest (78 percent).

Luminary spotlight

A viewpoint from Zack Kass

Insights from Zack Kass:

Navigating unmetered intelligence

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We are entering a period of unmetered intelligence: Abundant cognitive capacity at near-zero marginal cost that can be composed into agents, copilots, and autonomous workflows. Advantage shifts from access to models to imagination, to the discipline and governance required to deploy them at scale.

The KPMG data shows tech executives expect a sharp move from pilots to ROI in the next year: Eighty-eight percent of organizations are already embedding AI agents into their workflows, products and value streams. High performers expect about half of their tech teams to be permanent human staff by 2027. This signals a future where small, durable human cores orchestrate large AI-augmented ecosystems. In this environment, tech leaders can take on board the following five tips:

1 Adopt a portfolio of bets with an explicit failure budget

Most AI pilots will not cross the chasm. That is acceptable when experiments are cheap and fast. Set quarterly ‘throughput’ targets for ideas tested, decisions made, and winners scaled. Publish kill criteria upfront. Treat time-to-value and cost-to-value as first-class metrics.

2 Build the AI-native operating model

Move from projects to products and from apps to agents. Design ‘thin’ interfaces over ‘thick’ orchestration: data contracts, retrieval patterns, evaluation harnesses, human-in-the-loop controls, and incident playbooks. Give every critical workflow a default agent, a human owner, and a rollback plan. Measure agents by service levels: accuracy, latency, containment, and escalation quality.

3 Invest in behavioral adaptability and humanistic skills

Tech will compound faster than organizations can rewrite job descriptions. Train for orchestration, prompt, and policy design, judgment and taste. The product in many categories becomes the ‘bedside manner’, with the emphasis on trust, clarity and empathy delivered at scale through human-led experiences that are amplified by AI. High performers’ intention to maintain a strong human core is the right instinct for resilience and governance.

4 Govern for scale

Create a single model and agent registry. Standardize evaluation, privacy, safety, and change management. Require pre-deployment testing on real tasks, shadow runs in production, and post-deployment drift monitoring. Tie every agent to an accountable owner and a KPI. Treat prompts, policies and guardrails as versioned assets.

5 Prepare for the next frontier

Multi-agent systems will coordinate entire value chains. Synthetic data will unlock personalization without breaching privacy. Edge deployments will bring intelligence to stores, clinics, and factories. Quantum-adjacent advances in optimization may compress compute-intensive planning problems.

The adoption curve will be uneven. Some organizations may chase hype and overbuild. Others may miss compounding returns by waiting for ‘perfect’ tech. The path that wins is practical: many small bets, ruthless measurement, and fast scaling of what works. Translate unmetered intelligence into customer trust, resilient operations, and new revenue.

Conclusion and key recommendations

Looking ahead: Your 2026 agenda

01

Accelerate learning to build your new competitive moat

Be ready for the immense pace by treating organizational knowledge as strategic currency. Institutionalize rapid learning loops and shared knowledge.

02

Maximize value through data-driven investment

Make evidence-based decisions grounded in maturity assessments and external benchmarks, while continuously tracking and forecasting performance. Ensure KPIs are aligned with today's technology landscape and reflect the need for new approaches.

03

Build in adaptability through frameworks and culture

Streamline decision-making, and pivot if tools are superseded. Build adaptable teams and an innovative culture that can support this ethos.

04

Build a future-ready, agent-empowered workforce

Redesign a talent strategy that is focused on upskilling, building AI fluency, and cultivating the next generation of leaders who can effectively use, manage, and master AI.

05

Adopt an AI-first, trust-by-design mindset

Begin every design and decision with an AI-first mindset, and embed trust, transparency, and responsibility by design. Turn responsible AI into a competitive advantage, not just a compliance exercise.

06

Strengthen your data foundation and modernize your tech stack

AI can only be as powerful as the data powering it. Rationalize and modernize your tech stack, retire low-value legacy systems, and build modular and dynamic architectures ready for rapid iteration and AI-native applications.

07

Drive strategic ecosystem partnerships

Select ecosystem partners with purpose. Move from transactional relationships to strategic co-creation that enhances flexibility, fosters interoperability, accelerates innovation, and delivers better customer outcomes.

08

Have one eye on the future

Quantum computing, AGI, and ASI might be closer than we think. Even as you deliver on current needs, maintain focus on preparing for what's next.

As Swiss and global organizations enter the Intelligence Age, ambitions to elevate technology maturity and maximize ROI are high. Achieving this requires a strong strategic foundation, shifting from AI experimentation to scaled deployment, redefining ROI metrics, balancing investments, and fostering adaptive strategies and decision-making structures. Success also depends on cultivating a culture ready for change and optimizing a human-AI workforce through agentic AI, while preparing for emerging breakthroughs in quantum computing, AGI and ASI.

Clearly, there will be no easy ride through 2026 for tech executives in Switzerland if they want technology to genuinely empower their organizations to grow, and their people to embrace technology and thrive. It will be a challenging, complex year, the outcomes of which we look forward to reflecting on in surveys to come.

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