2026 KPMG Global Technology, Media & Telecoms CEO Outlook

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Foreword

Technology, media and telecoms companies are powering an increasingly connected global economy. They provide the technologies, content, networks and infrastructure through which businesses and consumers operate, communicate and innovate. As AI accelerates the pace of change, their role is becoming even more important, but the demands on the sector are rising too. The next phase of AI will be defined by where economic value is created, who captures it and which investments generate sustainable returns.

The KPMG 2026 TMT CEO Outlook captures a sector with strong growth ambitions. TMT leaders see significant opportunities ahead, from enabling the AI economy and unlocking new value from content to turning connectivity, data and customer relationships into higher-value services.

But the next phase will not be defined by ambition alone.

The AI conversation is already moving from adoption to economics. CEOs are asking whether substantial investment can generate sustainable, repeatable value. Behind the applications and use cases sits another AI story: the capital, compute, data centers, networks and energy required to power them.

This makes resilience inseparable from growth. As businesses become more dependent on AI, cloud infrastructure, data and connected ecosystems, securing those foundations becomes a strategic priority. Technology and telecoms companies have an important role to play, not only in protecting their own organizations, but in providing the trusted infrastructure on which other industries increasingly depend.

Regulation and geopolitical uncertainty are also sharpening the focus on governance, digital sovereignty and control over data. TMT leaders must decide where to invest, which capabilities and infrastructure require greater control, and where partnerships and alliances can provide the scale and speed they need to succeed.

The findings point to a new phase for TMT. AI ambition is clear. The question now is whether companies can prove the economics, secure the infrastructure, strengthen resilience, manage energy demand and build the workforce required to turn technological change into sustained growth?



Anna Scally
Global Head of TMT
KPMG International

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About the research

The 12th edition of the KPMG Global CEO Outlook, conducted with 1,400 CEOs between 11 August and 21 September 2026, provides unique insight into the mindset, strategies and planning tactics of CEOs.

This report focuses exclusively on the 310 Technology, Media and Telecoms CEOs surveyed. Where year-over-year comparisons are made (e.g. 2026 vs. 2025), the data is drawn from equivalent questions in previous editions of the KPMG CEO Outlook survey.

All respondents oversee companies with annual revenues over US$500M and a third of the technology and telecoms companies surveyed have more than US$10B in annual revenue. The complete survey included CEOs from 12 key markets (Australia, Canada, China, France, Germany, India, Italy, Japan, Netherlands, Spain, UK and US) and 13 key industry sectors (asset management, automotive, banking, consumer and retail, energy, infrastructure and transport, healthcare, insurance, life sciences, industrial manufacturing, media, technology and telecoms).

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

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Key findings

Growth confidence remains high

84% Technology **85%** Media **82%** Telecoms

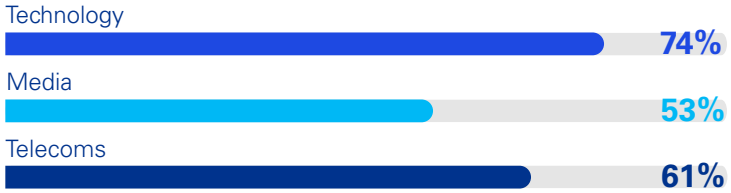
of CEOs are confident in their companies' growth prospects

72% Technology **65%** Media **57%** Telecoms

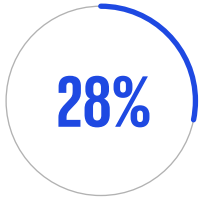
of CEOs are confident in global economic growth

Cyber is both #1 leading threat and the leading investment response

High AI ambition is increasing pressure to prove value



of CEOs believe they are moving at the right pace, or ahead of the curve, on AI



of Technology CEOs expect AI ROI within **six months**

56% Media **73%** Telecoms CEOs expect AI returns within **one to three years**

From workforce redesign to the AI-native organization

87% Technology **83%** Media **82%** Telecoms

are redesigning roles for human-AI collaboration

AI is putting sustainability on the strategic agenda

94% Technology **98%** Media **96%** Telecoms

of CEOs are concerned about AI's environmental impact

83% Technology **80%** Media **70%** Telecoms

of CEOs are confident in ability to measure sustainability impact of AI

Top three TMT workforce challenges:

- **Skills gaps**
- **AI upskilling**
- **Attracting and retaining talent**

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Economic outlook and business confidence

TMT CEOs remain confident about their companies' prospects. Eighty-four percent of technology CEOs, 85 percent of media CEOs and 82 percent of telecoms CEOs expect their businesses to grow.

Confidence becomes less uniform when leaders look beyond their own organizations. Seventy-two percent of technology CEOs surveyed are confident in global economic growth, falling to 65 percent in media and 57 percent in telecoms.

This creates an important tension at the heart of the findings. CEOs appear to believe that their organizations can outperform the uncertainty around them. But doing so will require more than maintaining investment. It will depend on whether organizations can translate their investment in technology into new sources of sustainable value while simultaneously strengthening the critical infrastructure and skills needed to support their growth ambitions. When asked about their approach to risk-taking, 27 percent of technology CEOs say they are taking more risks to capitalize on opportunities, compared with 18 percent of telecoms CEOs and just 10 percent of media CEOs. This suggests technology leaders may be more willing to make bold strategic bets despite continued economic uncertainty.

> "TMT is entering a new phase where AI will increasingly reshape the economics of the sector. The focus is moving beyond adoption to how companies turn AI, data and infrastructure into new sources of growth, more differentiated business models and sustainable returns. Over time, the ability to convert technology investment into durable economic value, while managing resilience, cyber and sustainability, can increasingly separate the leaders and shape future valuations."

Aseem Sharma
ASPAC Head of TMT
KPMG Singapore

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Technology

Technology CEOs have the strongest growth expectations, with 36 percent expecting earnings growth of more than 5 percent and, within that, 13 percent anticipating double-digit growth, the highest of all sectors surveyed. That represents a significant shift from both 2024 and 2025, when less than a quarter expected growth above 5 percent. But the opportunity is moving beyond rising demand for AI products. Agentic AI could change how software is developed, bought and consumed, potentially shifting value from traditional applications towards models, platforms and agent-enabled services. At the same time, the enormous capital requirements associated with compute and data-center infrastructure are raising a parallel question: which parts of the AI technology stack will ultimately generate attractive, defensible returns?

Media

Media CEOs also show strong confidence in their businesses, with 85 percent confident in their company's growth prospects, even as confidence in the global economy falls to 65 percent.

Converting that confidence into growth will depend partly on how media businesses respond to changes in the relationship between content, audiences and distribution. AI is changing search and content discovery, audiences continue to fragment across platforms, and questions around intellectual property and monetization are becoming increasingly important. For media businesses, the opportunity is not simply to create more content, but to protect its value and strengthen the routes through which it reaches and engages audiences.

Telecoms

Telecoms CEOs have more measured growth expectations. Twenty-two percent expect earnings growth of more than 5 percent, which is slightly below expectations in 2025 and 2024 (25 percent and 24 percent). At the same time, 82 percent remain confident in their own company's growth prospects, despite only 57 percent expressing confidence in global economic growth.

Yet AI could create a broader strategic opportunity. As AI drives demand for connectivity, compute and data services, telecom operators have an opportunity to become more important participants in the infrastructure underpinning the AI economy, rather than simply providers of connectivity. The strategic question is whether they can translate assets such as networks, data and trusted customer relationships into higher-value services and capture more of the economic value created on top of their infrastructure.

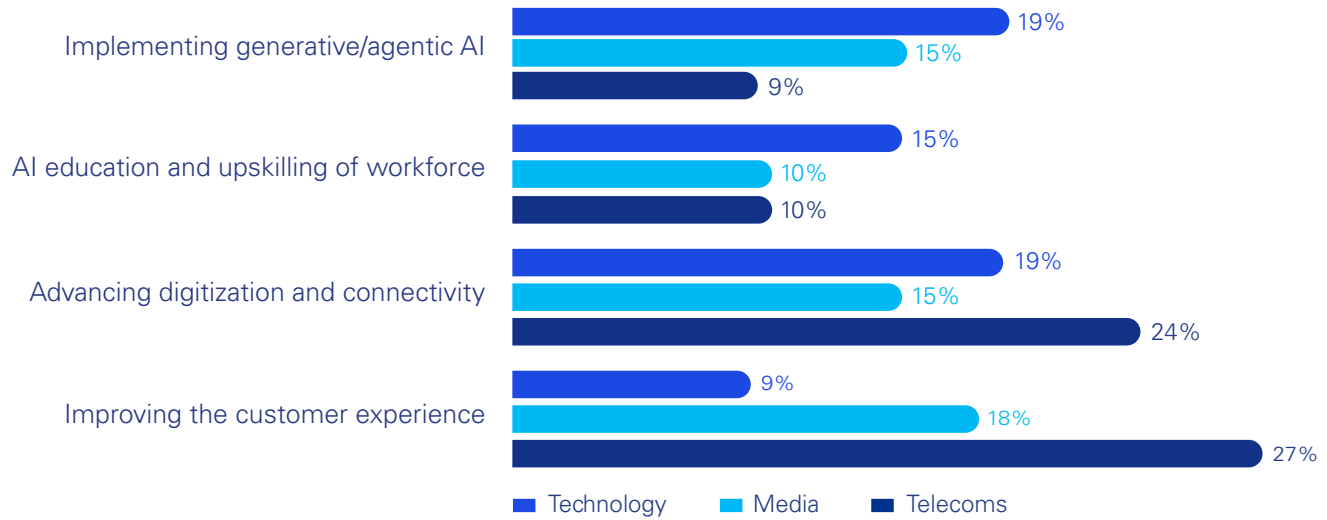
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Routes to growth

TMT has multiple growth engines. Technology companies can capture and enable demand for AI and emerging technologies. Media companies can unlock new value from content. Telecoms companies can use their position across connectivity, data and customer relationships to move beyond traditional services.

AI, digitization and changing customer expectations are creating opportunities across the sector. Telecoms leaders place greater emphasis on customer experience than the other TMT subsectors, pointing to a growth agenda centered on service delivery and execution. This reinforces a broader opportunity for operators: using networks, data and trusted customer relationships not simply to improve service, but to move closer to customers and develop higher-value propositions. M&A offers another route to new capabilities, technologies and markets. When asked about M&A, moderate appetite dominates across TMT, reported by 53 percent of technology, 60 percent of media and 43 percent of telecoms CEOs. Technology and telecom show greater appetite at the top end, with 37 percent and 36 percent respectively reporting high M&A appetite, compared with 18 percent in media. The strategic challenge is deciding where to place the biggest bets and how to turn investment into sustainable commercial value.

Top operational priority by subsector



Source: KPMG 2026 TMT CEO Outlook, KPMG International, November 2026.

> For telecoms companies, better customer experience is about more than improving service interactions. Operators sit at a powerful intersection of connectivity, data and trusted customer relationships. As AI changes how services are delivered, the opportunity is to use those assets to move closer to customers and develop new, higher-value services. Financial services and fintech provide one example of how operators can potentially extend beyond traditional connectivity.

Lawrence Amadi
Africa Head of TMT, KPMG Nigeria

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Risk and regulation

Cybersecurity is the number one threat to growth — and the number one investment response.

Cybersecurity and data security are the leading threats to growth across all three TMT subsectors. Organizations are responding accordingly. Cybersecurity and digital risk are also the leading areas of increased risk mitigation investment, selected by 51 percent of technology CEOs, 45 percent of media CEOs and 59 percent of telecoms CEOs.

The close alignment between the perceived threat and the investment response is significant. As AI becomes embedded in products, operations and customer interactions, cyber resilience increasingly determines how confidently businesses can innovate and scale.

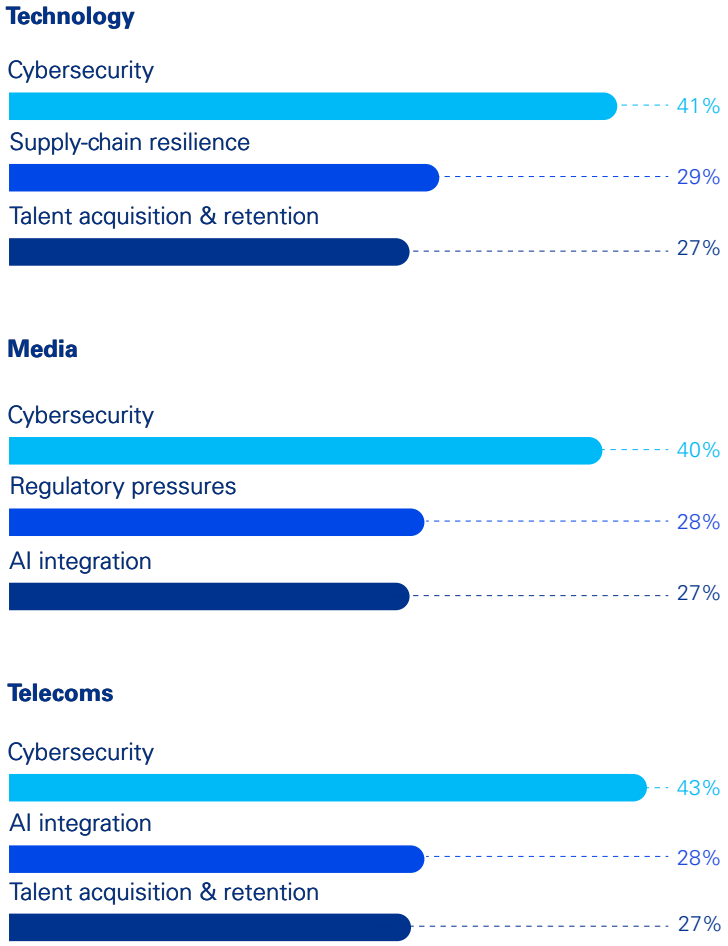
For technology and telecoms companies, this creates both responsibility and opportunity. They provide much of the cloud infrastructure, connectivity, cybersecurity, identity and data management on which other industries depend. As demand for secure and resilient digital infrastructure grows, resilience itself can become a source of growth rather than simply a cost of managing risk.

> “As organizations become more dependent on AI, cloud and connected infrastructure, cyber resilience becomes inseparable from growth. Businesses want greater control over critical data, technology and supply chains, but none operate in isolation. The opportunity for the technology sector is not simply to defend against emerging threats, but to provide the trusted and resilient foundations on which wider digital growth depends.”

Joe Cassidy
UK and EMA Head of TMT
KPMG UK

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Top threats to growth by subsector



Source: KPMG 2026 TMT CEO Outlook, KPMG International, November 2026.

Resilience is driving demand for control

AI, cyber threats and supply-chain disruption are sharpening the focus on control. Businesses are reassessing where their technology is sourced, where data is stored and processed, which providers they depend on and where greater control over critical data, systems and infrastructure may be needed. More than half of CEOs in each TMT subsector surveyed say internal data governance and control is shaping their organization's AI strategy.

This is bringing questions of digital and data sovereignty further into the strategic conversation. For businesses operating across borders, choices around technology architecture, infrastructure and data are increasingly influenced not only by performance and cost, but by resilience, regulation and geopolitics. "As networks, data and AI become increasingly interconnected, telecoms operators are navigating a much broader risk environment spanning cyber, data sovereignty, privacy, AI and regulation" says Diogo Sousa, Head of Telco COE, KPMG Portugal. "The challenge is to build resilience across that ecosystem while continuing to modernize and innovate."

Regulation adds another consideration for TMT CEOs. Around three in ten CEOs across technology, media and telecoms are increasing investment in regulatory reporting and compliance as requirements around AI, privacy and digital trust expand. Technology leaders are also stepping up their response to geopolitical uncertainty, with 32 percent increasing geopolitical monitoring and analysis.

Yet preparedness has not necessarily kept pace. When asked about evolving digital-risk regulation in areas including AI, cyber, privacy and platform safety, 42 percent of technology CEOs and a third of telecoms CEOs said they were only moderately prepared, with significant gaps remaining.

> "It is surprising to see preparedness lagging when tech companies are navigating a myriad of regulatory requirements, from AI and data privacy to cyber and platform safety. As regulatory approaches continue to evolve across markets, understanding where policy is heading, and what it means for the business, needs to be an increasingly important part of strategic planning."

Anna Scally
Global Head of TMT
KPMG International

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Media leaders want stronger AI regulation — but worry it could slow progress

Sixty-two percent of media CEOs believe AI regulation should increase, while 80 percent believe the pace of regulatory progress will become a barrier to success. This suggests concern is not about regulation itself, but about uncertainty, fragmentation and the challenge of keeping pace with change. Fifty-five percent say increased regulation has already prompted changes at board level. But the challenge extends beyond compliance. AI is raising questions about intellectual property, provenance and trust. As audiences encounter more AI-generated content and discovery becomes mediated by algorithms and AI platforms, protecting the value and credibility of content becomes both a risk issue and a commercial imperative.

Media CEOs agree:

62%
AI regulation should increase

55%
AI regulation has prompted changes at board level

80%
the pace of progress on AI regulations will be a barrier

> In a fragmented media landscape, trust is taking on a new premium. Maintaining customer trust in an era of deepfakes and auto-generated content will be critical, while copyright and IP remain major concerns. How do media companies protect their content? How do they price it? These are huge questions — but the mood in the boardroom is becoming a little more optimistic as new content partnership models begin to emerge. AI-driven product innovation will be key.

Nat Gross
EMA Head of Media
KPMG UK

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From adoption to value to the true cost of AI

AI is already embedded in TMT investment priorities. But the findings suggest the next phase of the AI story will not be defined simply by who spends or adopts fastest. Increasingly, it will likely be defined by who can turn AI into repeatable business value.

Technology is moving with the greatest intensity. Eighty-eight percent of technology CEOs identify AI as a top investment priority, compared with 82 percent in telecoms and 76 percent in media. Technology CEOs also report the greatest confidence in their pace of adoption, with 74 percent saying they are moving at the right pace or ahead of the curve, versus 61 percent in telecoms and 53 percent in media.

Agentic AI could redraw the TMT value chain

One of the clearest signals of what comes next is agentic AI. Eighty percent of technology CEOs and 76 percent of telecoms CEOs expect it to have a significant or transformational impact, compared with 38 percent in media and 57 percent across all sectors.

80% Technology | **38%** Media | **76%** Telecoms

expect significant or transformational impact from agentic AI, versus 57% across all sectors.

The significance extends beyond another wave of AI adoption. Agentic systems have the potential to alter how customers interact with companies, how software and services are consumed and how work moves through organizations. For technology companies, that raises questions about the role and economics of traditional applications as agents increasingly sit between users and software. For telecoms, it could create opportunities around identity, data, connectivity and orchestration. For media, it intensifies questions around discovery, provenance, rights and the relationship with audiences.

As agents increasingly become the interface through which people access software and services, value could shift away from traditional applications toward the models, platforms, data, infrastructure and trusted relationships that enable them. That could materially redraw profit pools across TMT.

The AI race becomes a return-on-capital question

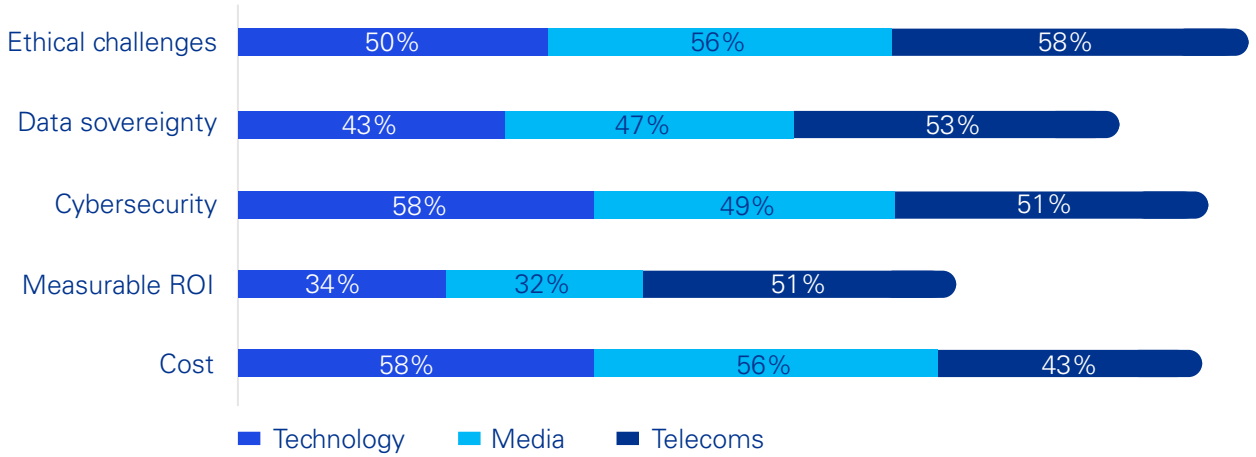
The bigger test, however, is whether that ambition translates into measurable returns. And here, being fastest to adopt does not necessarily mean being furthest ahead on value. Half of technology respondents report significant or transformational measurable value from AI, compared with 70 percent in telecoms.

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Twenty-eight percent of tech CEOs surveyed expect to see ROI in the next six months, far outstripping the all-sector average of just three percent. Most telecoms CEOs, at 73 percent, and media CEOs, at 56 percent, expect returns over a one-to-three-year horizon.

That puts the economics of AI firmly into focus. As organizations move from experimentation towards scaling AI across the enterprise, the equation extends beyond the cost of models and applications. Leaders are now looking at the "true cost of AI": CapEx, infrastructure, compute tokenomics, energy and financing. That makes AI not only a technology investment question, but a capital allocation question. The companies that create the most value may not necessarily be those that spend the most, but those that identify where they can build differentiated advantage and earn sustainable returns on that investment.

AI implementation challenges by sub-sector



Source: KPMG 2026 TMT CEO Outlook, KPMG International, November 2026.

> "We're entering the AI economics phase now. Over the next few years, I think we're going to see a real separation between companies that turn AI investment into revenue, margin and enterprise value and those that struggle to make the economics work. At the same time, the amount of capital going into compute, data centers, networks and power is extraordinary. How efficiently we power that infrastructure, who bears the cost and whether it ultimately creates enough economic value to justify the investment are becoming much bigger questions. I think those questions are going to shape the technology and telecoms industries as much as the technology itself."

Chad Seiler
US and Americas Head of TMT
KPMG US

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AI infrastructure brings energy into the growth equation

AI may be transforming digital business models, but scaling it increasingly depends on physical infrastructure. Compute capacity, data centers, networks and power are becoming integral to the economics of AI growth. That makes energy a strategic issue rather than simply an environmental one.

Concern about AI's environmental impact is already high, cited by 94 percent of technology CEOs, 98 percent of media CEOs and 96 percent of telecoms CEOs. Around half of TMT CEOs are also increasing renewable or lower-carbon energy sourcing. The emerging question is therefore not simply how companies reduce AI's environmental footprint. It is whether access to sufficient, reliable and economically viable power becomes a constraint on where AI infrastructure is built and how quickly it can scale. Sustainability, infrastructure strategy and capital allocation are becoming increasingly interconnected.

59% ⇒ 70%

(2025 vs. 2026)

technology CEOs saying sustainability is fully embedded in the business.

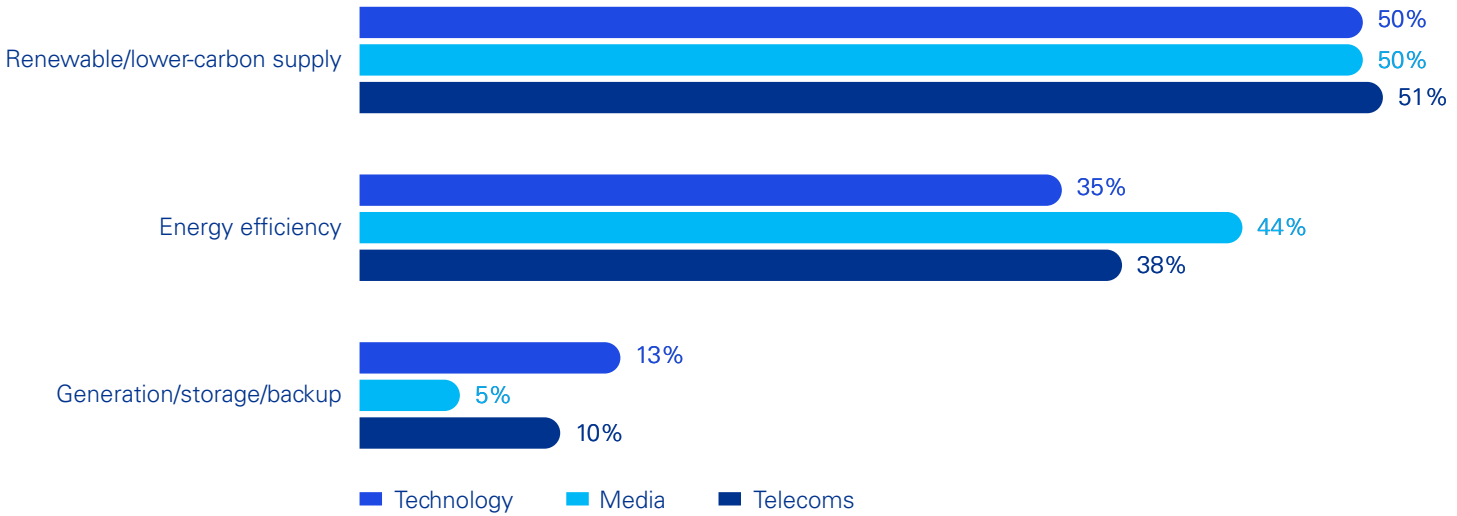
49% ⇒ 63%

(2025 vs. 2026)

are integrating sustainability more deeply into core strategy.

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Planned energy approach over the next three to five years



Source: KPMG 2026 TMT CEO Outlook, KPMG International, November 2026.

In the technology sector, 70 percent of CEOs now say sustainability is fully embedded in the business, up from 59 percent in 2025, while 63 percent are integrating sustainability more deeply into core strategy, up from 49 percent. In telecoms, 71 percent factor sustainability into capital investment decisions, while 83 percent of media CEOs say sustainability is fully embedded in their business.

This creates an important tension for TMT. AI can help businesses optimize operations and energy use, while scaling AI itself requires more compute, infrastructure and power. As demand increases, access to reliable and economically viable power, the infrastructure required to deliver it and who ultimately bears that cost will increasingly influence where AI capacity gets built and whether the economics work.

The investment picture, however, is more nuanced. When asked specifically about increasing investment in climate and sustainability initiatives to mitigate pressing business risks, 25 percent of media CEOs agreed, compared with 18 percent across all sectors, 11 percent in telecoms and just 8 percent in technology.

> “As AI expands, so do the requirements for compute, infrastructure and energy. TMT CEOs clearly recognize AI’s environmental impact. The challenge now is to turn that awareness into action, harnessing AI’s potential while ensuring it scales in an environmentally and socially responsible way.”

Gauthier Acket
Global Head of Sustainability
KPMG International

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From workforce redesign to the AI-native organization

The workforce question is becoming bigger than whether AI creates or removes jobs. The more strategic question is how organizations themselves change when people increasingly work alongside AI agents capable of performing complex tasks.

The TMT findings suggest that redesign is already underway. Eighty-seven percent of technology CEOs, 83 percent of media CEOs and 82 percent of telecoms CEOs say they are redesigning roles, career paths and team structures around human-AI collaboration. At the same time, more than half of CEOs across all three sectors still expect overall workforce growth of up to 5 percent over the next three years.

87% Technology | **83%** Media | **82%** Telecoms

CEOs are redesigning for human-AI collaboration. More than half still expect workforce growth of up to 5 percent.

The implication may be a more fundamental redesign of the operating model. As agents take on more activity, companies will need to reconsider how work is distributed, where decisions sit and how talent develops. That could mean fewer organizational layers, different career and leverage models and significantly greater output per person. Competitive advantage may increasingly come from redesigning the organization around what people and AI can each do best, rather than simply adding AI to today's processes. At the same time, concerns about employee burnout and workforce readiness suggest implementation risks remain significant. For many organizations, the next phase of AI transformation may depend as much on organizational change as on technology deployment.

70% Technology | **81%** Media | **66%** Telecoms

CEOs concerned about increased burnout as a result of increased AI implementation.

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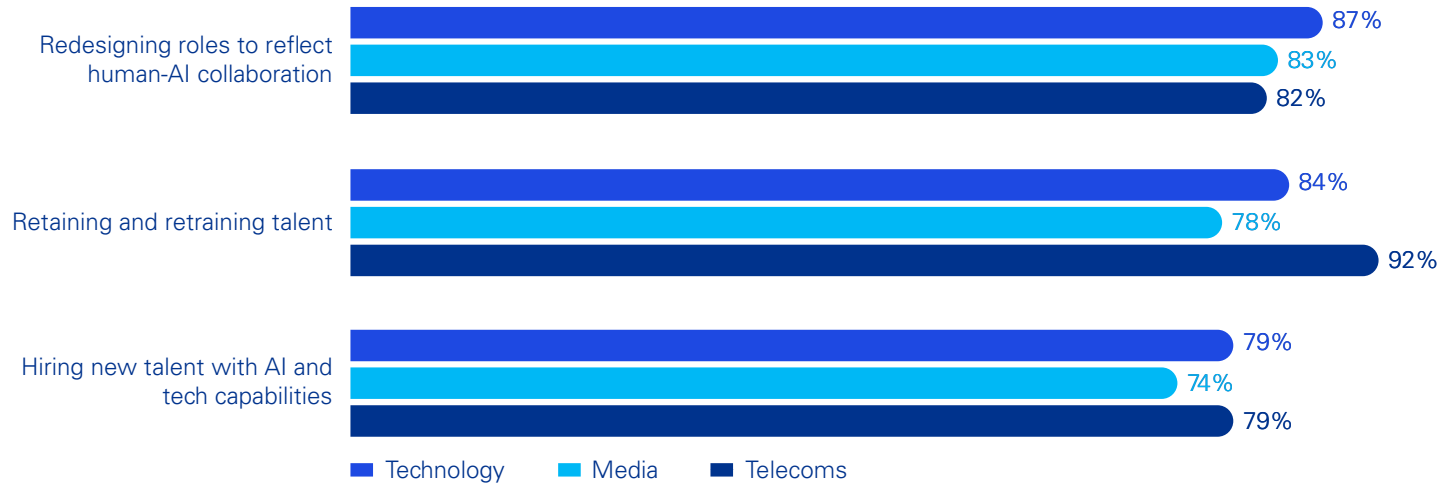
The skills challenge looks different across TMT

Technology leaders are balancing the need to attract specialist talent with building capability from within. Upskilling employees in AI systems is their leading workforce challenge at 55 percent, followed by skills gaps and attracting and retaining talent, both at 51 percent. Technology CEOs are also more likely than CEOs overall to point to maintaining productivity and performance as a challenge, at 35 percent versus 27 percent.

The capability gap is particularly pronounced in media. Sixty-seven percent of media CEOs identify workforce skills gaps as a leading challenge, while 59 percent point to AI upskilling. This suggests the question is not simply how media companies adopt AI, but whether their workforces have the capabilities needed to capture its value.

For telecoms, workforce readiness is playing out alongside continued transformation. Skills gaps (54 percent) and AI upskilling (48 percent) are the leading challenges, while 28 percent cite managing employee expectations. As operators modernize their businesses, bringing the workforce through that change will be as important as introducing new technology.

Long-term workforce strategy in response to AI



Source: KPMG 2026 TMT CEO Outlook, KPMG International, November 2026.

> "The AI skills gap is not simply a shortage of technical talent. It is equally a mindset challenge. Organizations need people with the curiosity to question how work is done and the imagination to reinvent it. Reskilling matters, but reimagining work matters even more."

Akhilesh Tuteja
Head of Clients and Markets & TMT
KPMG India

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Looking ahead

TMT is entering a period of significant opportunity. Growth will increasingly depend not simply on how much companies invest in technology, but on where they choose to play and whether investments translate into attractive, sustainable returns.

The next phase will not play out evenly across TMT. In technology, agentic AI will likely challenge traditional software economics as value shifts across applications, models and platforms. In media, AI may reset the economics of content, changing how IP is created and monetized and how audiences discover it. In telecoms, the explosion in AI traffic and infrastructure demand creates an opening to move beyond connectivity and capture more of the value in compute, data and trust. Across all three, the companies that can create the most value will likely be those that turn AI and infrastructure investment into new sources of growth, stronger economics and higher enterprise value.

Questions for your boardroom

Where will your next phase of growth come from?

Confidence remains high, but the economics differ significantly across TMT. Which products, services and business models can generate sustainable growth rather than simply additional scale?

Are your digital foundations resilient enough for the growth you are planning?

Cyber and data security are the leading growth threat across all three sub-sectors. As dependence on AI, cloud, connectivity and third-party ecosystems increases, where does your organization need greater resilience or control?

Can you prove the economics of AI?

Investment is substantial and expectations are high. Are you measuring the full cost of AI, including infrastructure, compute tokenomics, energy and talent, against the value it creates?

How will regulation change where and how you compete?

AI, cyber, privacy, platform safety and digital sovereignty are reshaping the regulatory environment. Where could regulation create friction, and where could your organization's ability to operate in a trusted, compliant environment become an advantage?

Do you have the workforce for the next phase of transformation?

Roles are being redesigned at the same time as organizations continue to anticipate overall workforce growth. Which capabilities will become more valuable as AI takes on more tasks, and where does human judgement remain critical?

What happens when the infrastructure demands of AI become strategic constraints?

Compute, physical infrastructure and energy are increasingly part of the AI equation. How will your organization secure what it needs, finance the investment and manage its environmental impact?

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