NTT DATA

Spotlight on Europe

Global GenAI Report

How organizations are mastering their GenAI destiny in 2025

GenAI: a revolution, not hype

" Almost two thirds of the C-suite in Europe view GenAI as a revolutionary game changer

Only 1%
of the C-suite in Europe see GenAI as overhyped

96%
of all 576 European respondents place a growing emphasis on GenAI's long-term potential

92%
of the C-suite in Europe anticipate a material impact from GenAI technology

Overarching sentiment toward GenAI is positive

61%
of European respondents exhibit optimism about GenAI

- 61% Positive
- 15% Moderate
- 24% Negative
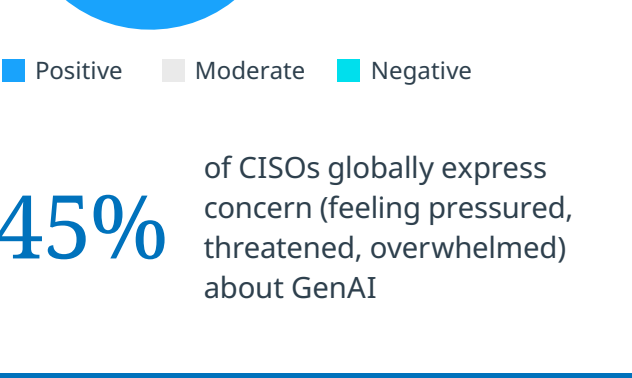
45%
of CISOs globally express concern (feeling pressured, threatened, overwhelmed) about GenAI

The current GenAI landscape in Europe

45%
strongly agree their existing solutions are meeting expectations

91%
say legacy infrastructure hinders effective use of GenAI

Playtime is over

99%
of organizations in Europe are planning further GenAI investment, more than half at a significant level

9 in 10
organizations in Europe are actively assessing enterprise-wide opportunity areas or GenAI

01

Strategy and transformation

80% in Europe have a well-defined GenAI strategy in place → But **56%** have not yet aligned that strategy with their business plans

Establishing an expert GenAI team is key to success

3x
Globally, organizations with dedicated teams are nearly three times more likely to be very satisfied with their GenAI efforts

Proven use cases to execute your strategy

In Europe,
100%
say a solution with an ROI that's been proven by real-world use cases is important to develop GenAI strategy

Top 3 use cases in Europe
1. Personalized service recommendations and knowledge management
2. Risk assessment and fraud detection
3. Quality control

Top 4
lessons learned in Europe from GenAI deployments

| High-quality, diverse and clean data is paramount for effective GenAI models | It is best to begin with focused GenAI projects and expand based on results | Much more rigorous internal testing is needed before reliably scaling GenAI | A partner with end-to-end capabilities and proven industry use cases is imperative |

Given the rapid adoption and advancement of GenAI technology, organizations will have to constantly re-evaluate, evolve and fully align strategies and operating models

02

Innovation and technology

94%
in Europe agree, **44% strongly**, that GenAI is driving a new level of creativity and innovation in the organization

9 in 10
agree that GenAI will have a material impact on improving the organization's R&D efforts

81%
say it's very important that their leadership team provide guidance on balancing innovation with responsibility

43%
agree strongly that they have the necessary capabilities to integrate GenAI

96%
say cloud-based solutions are the most practical and cost-effective means to support GenAI applications

In Europe, GenAI integration is stifled by outdated infrastructure

94%
agree that the integration of GenAI (and digital twins) will require significant investment in data infrastructure and computing power

But only
42%
strongly agree that they have conducted a detailed analysis or assessment of their future infrastructure (including integration) needs for GenAI

Managing the security risks that come with GenAI

91%
of the C-suite in Europe are very concerned about the potential security risks associated with GenAI deployments, but say the promise and ROI of GenAI outweigh the risk

But only **2 in 5**
of the C-suite in Europe strongly agree the security risks associated with GenAI are adequately understood and managed

Just
41%
say that their GenAI and cybersecurity strategies are fully aligned

03

People and culture

GenAI is leading to a technological and a cultural revolution

In Europe
95%
agree, **44% very strongly**, that GenAI will have a material impact on improving productivity

94%
are considering how GenAI can streamline future employee workflows and support processes

2 in 3
organizations in Europe acknowledge their employees don't have the skills to work with GenAI

Less than
1 in 3
are planning employee education and training to increase GenAI adoption

04

Ethics, safety and sustainability

As GenAI infuses into daily life, balancing responsibility and innovation will be a moral imperative as well as a strategic necessity

GenAI regulation

8 in 10
in Europe say government regulations on AI are unclear, which stifles innovation and hinders investment in GenAI

94%
expect spending on GenAI-related regulatory compliance will increase

GenAI and sustainability

3 in 4
say that GenAI ambitions stand in conflict with and/or are negatively affecting sustainability goals

95%
say using renewable energy to power GenAI infrastructure is a targeted business objective

Top 3
key responsibilities for European leaders in developing GenAI

| Maintaining human oversight and regularly reviewing GenAI policies | Integrating responsible considerations into strategic decision-making | Collaboration between organizations, GenAI experts and governments |

NTT DATA can help you master your GenAI destiny

Meet the mandate head-on. Visit our **website** to see how NTT DATA can help you chart a path forward with GenAI.

Read the full report

Join the conversation