Turning AI Ambition into Enterprise-scale Impact

concentrix™

Executive Summary

AI has captured the boardroom—but not yet the business. Everest Group's research reveals that while investment and enthusiasm in AI are surging, most organizations are still stuck piloting projects that can't quite get off the ground. The gap between experimentation and execution is now the defining challenge of the AI era.

Scaling AI goes beyond the technology. It's an operating-model issue, one where human and AI collaboration is stymied by roadblocks. Real progress depends on readiness, governance, and disciplined execution. The organizations breaking through are embedding AI into their core business architecture and partnering strategically to accelerate time-to-value.

Through Concentrix's Agentic AI Operating Framework™ and iX Product Suite, we help enterprises move from pilot to production—aligning strategy, data, and human expertise to deliver AI that performs reliably at scale. From readiness assessments to orchestration and governance, we provide the end-to-end structure enterprises need to turn experimentation into transformation.

AI won't scale by accident. It takes design, discipline, and the right partner. To power a world that works, you'll need more than just ambition. You'll need impact.

At a Glance

41%
of enterprises exploring gen AI remain in the pilot phase

Only
27%
have achieved scaled implementations

56%
cite lack of in-house AI skills as their top barrier

63%
are adopting hybrid models of in-house and external capabilities to accelerate scale

Scaling success depends on governance, data integrity, and disciplined execution

Everest Group®

November 2025

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How to Move from Pilots to Scaled Gen AI Adoption

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Introduction

Boards and CEOs across industries are pressing their organizations to embrace AI. Pilots are being launched at speed, and budgets are shifting to support experimentation. Yet despite the surge in activity, many organizations remain stuck at the pilot plateau.

Our research with more than 450 enterprises worldwide shows that this plateau reflects less of a lack of intent and more the absence of a coherent strategy. Too many pilots are initiated without a clear destination, a roadmap for scaling, or alignment on the operating model required to embed AI across the enterprise. Regardless of enterprise size, implementation is stalling: only about one-third of organizations report having the majority of their gen AI projects in active implementation. This highlights that strategy and execution discipline matter far more than scale alone.

What is clear is that scaling AI requires more than technical experimentation. Enterprises must conduct honest readiness assessments, identify the strategic steps that drive measurable outcomes, and determine when to partner externally to accelerate progress. Without this clarity, organizations risk creating fragmented Proofs of Concept (PoC) that appear innovative but deliver little beyond isolated wins.

In this viewpoint, we address three vital questions enterprise leaders are asking:

- Why are so many pilots failing to scale?
- What structural barriers are holding organizations back?
- How can enterprises move from experimentation to systemic, repeatable transformation?

Grounded in research and market evidence, this report equips leaders with a pragmatic lens: how to recognize the barriers that matter most, where to focus investment and talent, and how to convert pilot enthusiasm into durable, enterprise-wide outcomes.

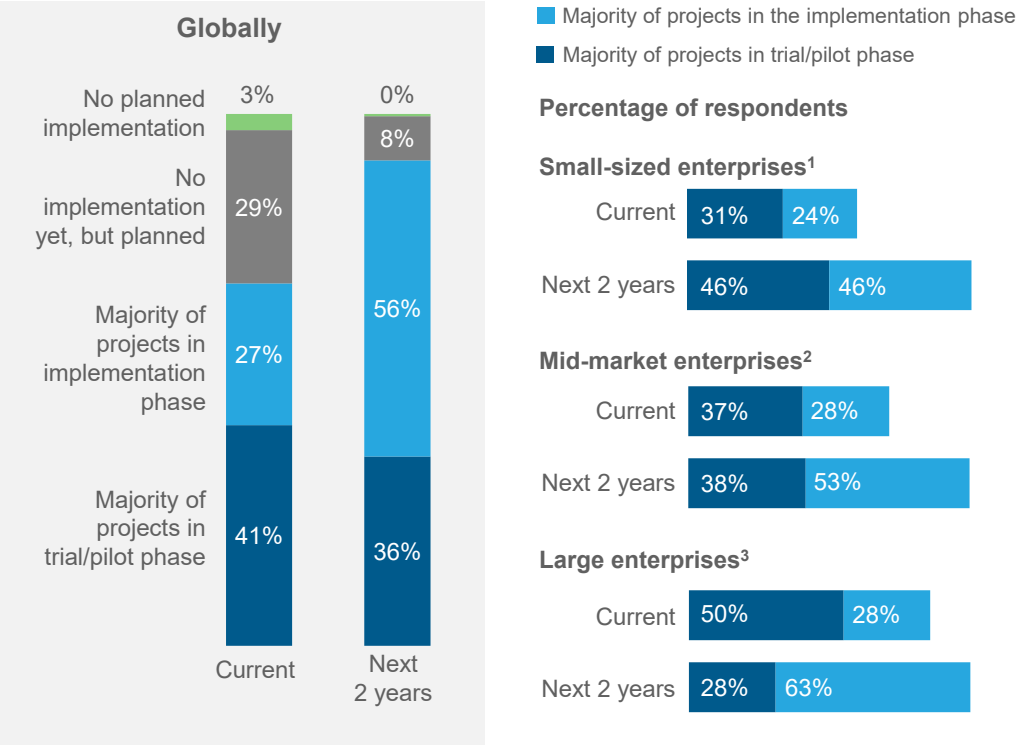
Understanding the pilot plateau

Enterprise investments in technology enablement are pivoting toward enabling long-term growth and innovation rather than short-term tactical optimization. Rising market competition and shifting customer expectations are pushing organizations beyond purely defensive strategies focused on cost control or compliance. However, most enterprises remain far from realizing their vision of value-driven gen AI implementations that can operate effectively at scale. According to Exhibit 1, 41% of enterprises remain in the pilot phase, relying on limited-scope use cases and proofs of concept, and, only 27% have progressed into implementation, signaling that most organizations are still exploring cautiously rather than deploying confidently.

What is more telling is how this pattern shows up across company sizes. Large enterprises are not necessarily further ahead, despite having scale, budget, and more mature IT stacks. Half of them report that most of their gen AI projects are still in trial. Only 27% have transitioned into implementation. Small (24%) and mid-sized (28%) enterprises report similar or better implementation rates, reflecting more focused, less encumbered approaches to gen AI adoption.

Exhibit 1: Respondents' current and expected gen AI implementation levels

Source: Everest Group (2025)



1 Small-sized enterprises: US$100 million – US$500 million
2 Mid-market enterprises: US$500 million – US$1 billion
3 Large enterprises: Above US$ 1 billion

What is blocking the runway?

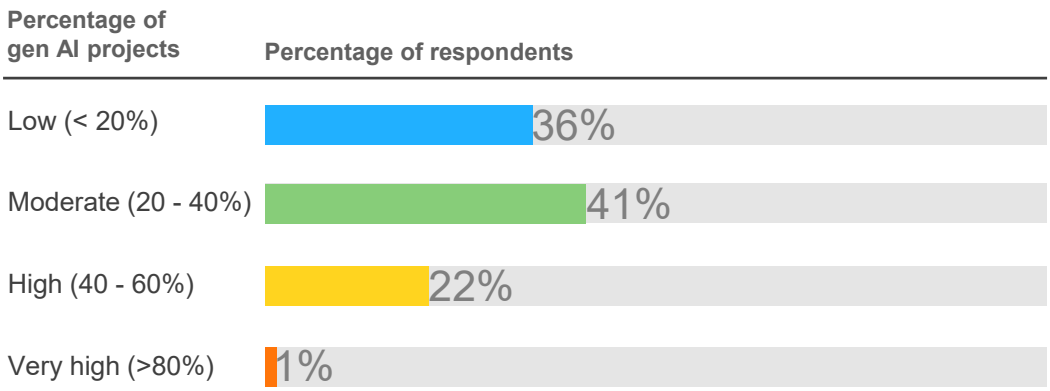
Enterprises lack the systems, skills, and structure to launch and a joined-up strategy to scale. Too often, AI is applied to single steps, not the whole process. Without end-to-end design, shared data, the right operating models, talent readiness, and clear governance, take-off stalls.

The illusion of progress

While enterprises quickly fund gen AI pilots, they struggle to move beyond them. Exhibit 2 shows 77% of enterprises have implemented less than 40% of their gen AI pilots, highlighting that most initiatives stall before they can scale.

Exhibit 2: Percentage of gen AI projects that have moved from trial/pilot phase to implementation phase

Source: Everest Group (2025)



The numbers reveal a wide intent-action gap. Even among enterprises investing aggressively, only 1% have scaled over 80% of their pilots into production. The vast majority get stuck in navigating early operational hurdles, such as integration complexity, talent readiness, and risk governance.

> “Everybody’s ready for AI, except your data.”
>
> – CEO of an American Cloud Company

Friction points

Everest Group has identified the top barriers to scaling gen AI. Exhibit 3 shows key challenges global enterprises face. But these are more than just checkboxes; they are structural breakdowns that surface only when enterprises try to industrialize AI.

Exhibit 3a: Top 5 early-stage barriers to gen AI adoption globally

Source: Everest Group (2025)

Percentage of respondents

56% Building in-house skills and expertise (e.g., training teams, developing talent pipelines, and hiring AI specialists)

51% Ensuring robust cybersecurity and safeguarding AI models (e.g., protecting against adversarial attacks, securing data, and mitigating risks)

47% Ensuring data integrity and mitigating biases (e.g., addressing data biases, ensuring fairness, and maintaining ethical AI practices)

41% Addressing legacy IT and integration challenges (e.g., compatibility issues with existing systems, IT modernization)

41% Access to high-quality and reliable datasets (e.g., data availability, quality control, and ensuring diverse and representative datasets)

34% Finding the right infrastructure and managing complexity (e.g., selecting and optimizing cloud platforms, GPUs, and other technologies)

34% Identifying and prioritizing Gen AI use cases (e.g., assessing feasibility, defining high-impact applications, and aligning with business goals)

28% Developing a strong business case and securing stakeholder buy-in (e.g., proving ROI, gaining leadership support, funding approvals)

19% Navigating regulatory compliance and governance (e.g., cross-border regulations, ethical AI considerations, industry-specific compliance)

Exhibit 3b: Top 5 early-stage barriers to gen AI adoption by geography

Source: Everest Group (2025)

X is ranking of challenges encountered by respondents

Early-stage barriers (Key barriers faced by enterprises while implementing gen AI)	North America	EMEA	LATAM	APAC
Building in-house skills and expertise	1	1	-	1
Addressing legacy IT and integration challenges	5	4	5	4
Ensuring robust cybersecurity and safeguarding AI models	2	2	1	2
Ensuring data integrity and mitigating biases	3	3	3	2
Access to high-quality and reliable datasets	4	-	4	3
Finding the right infrastructure and managing complexity	-	5	2	5

Let us discuss these barriers in detail.

1 **Skills gaps:** The most common barrier, cited by 56% of respondents, is the lack of in-house skills and expertise. It is not just about hiring data scientists but about securing prompt engineers, model validators, AI product managers, and ML ops teams who understand how to integrate models into workflows, monitor their behavior, and maintain them over time.

In many cases, the talent gap causes handoffs between business and tech teams to break down. Projects lose momentum due to the lack of shared understanding or technical confidence. In every region, **building in-house skills** ranks at the top, highlighting a global bottleneck in talent readiness.

2 **Cybersecurity fears block deployment:** Over half of the surveyed enterprises (51%) cite concerns around robust cybersecurity and AI model safeguards as a key adoption barrier. These concerns are practical, not speculative. For example:

- A tech firm paused an AI feature rollout after detecting cross-tenant data exposure through its API
- A healthcare institution delayed LLM deployment due to concerns over PHI traceability, model logging transparency, and GDPR alignment

In LATAM and APAC, cybersecurity is the top or joint-top concern, suggesting that perceived risk is enough to delay or derail scaled adoption.

3 **Bias, fairness, and ethical use as operational risks:** Around 47% of enterprises struggle to ensure fairness, mitigate data bias, and apply ethical AI practices. These are not just abstract governance challenges; they directly impact production-readiness. For example:

- A North American airline had to compensate a customer after its AI-powered chatbot provided false refund information
- A University of Washington research shows significant racial and gender bias in resume-ranking LLMs

In EMEA and North America, this issue ranks among the top three concerns, reflecting a higher compliance burden and reputational risk sensitivity.

4 **Data is everywhere, but not in the form that gen AI needs:** Enterprises are discovering that access to high-quality and reliable datasets is far more complex than anticipated. It is not just about having data, but about having the right kind:

- Labeled, diverse, up-to-date, and context-rich
- Available via pipelines for Retrieval-augmented Generation (RAG)
- Governed with metadata and lineage

This barrier ranks among the top five barriers globally (41%), and in **APAC, it ranks third,** revealing a widespread struggle with grounding models in enterprise data.

5 

Legacy systems are making gen AI integration hard: Addressing legacy IT and integration challenges remains a top-five issue globally, particularly in North America, LATAM, and APAC. Enterprises report:

- Trouble connecting gen AI tools with internal systems due to missing APIs
- Conflicts with data governance policies embedded in legacy infrastructure
- Fragmented knowledge bases leading to inconsistent AI responses

This issue results in a common pattern: pilots work, but scaling them into business operations breaks the flow.

6 

Infrastructure complexity slows down even well-funded efforts: One-third of enterprises cite difficulty in selecting and optimizing cloud platforms, GPUs, and supporting infrastructure. This infrastructure includes:

- Cloud cost control challenges when deploying large models
- GPU provisioning bottlenecks
- Compatibility issues with legacy ERP and CRM stacks

This challenge is particularly pronounced in EMEA and LATAM, where infrastructure scale-up collides with procurement and data residency constraints.

While leadership interest is high, the business case for scale remains unconvincing, particularly when early pilots do not tie clearly to P&L outcomes. Scaling gen AI is less about ambition and more about removing the bottlenecks.

> "AI hallucinations and a lack of explainability have long been the Achilles' heel of scaled AI adoption, particularly in high-stakes environments."
>
> – Founder and CEO, American Data Services Company

Scaling ambitions through a lens of capital allocation

As gen AI moves from boardroom strategy decks to operational blueprints, one truth is becoming apparent: scaling AI is not only a technical or managerial challenge but also a capital and commitment challenge.

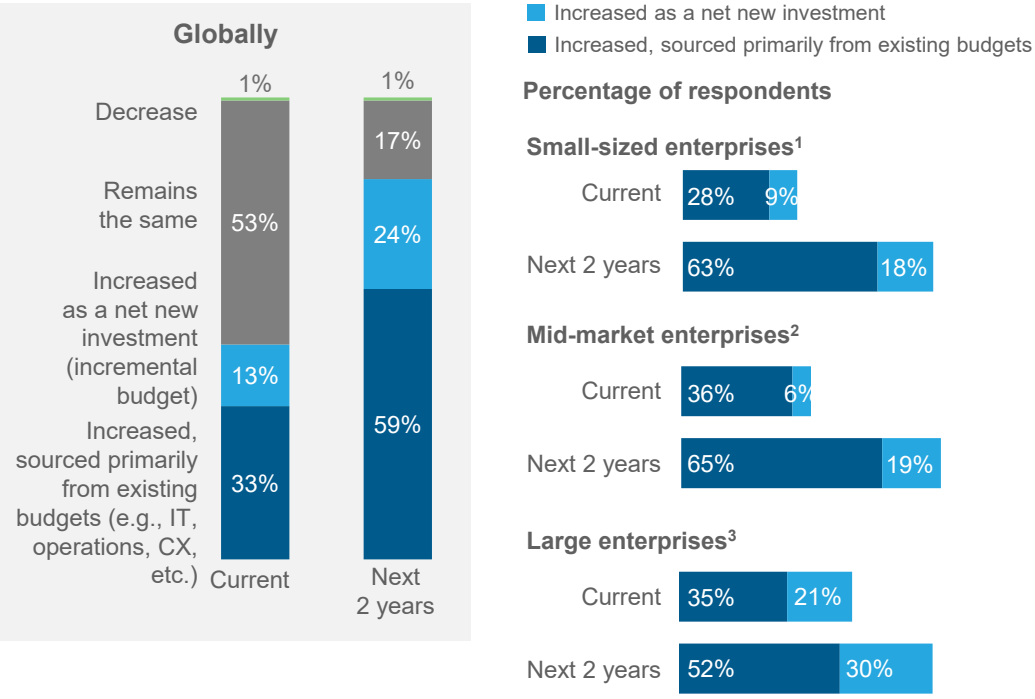
Financial and strategic constraints

Globally, gen AI budgets are expanding. Today, just under half of enterprises report incremental investments, but over the next 2-3 years that figure is expected to rise sharply, with more than 80% of organizations planning to increase their total gen AI spend. As shown in Exhibit 4, this shift signals a transition from cautious exploration to committed funding.

The expansion is especially pronounced among small and mid-sized enterprises, with nearly 85% anticipating budget growth in the coming years. Large enterprises also project steady increases, with roughly one in three expecting to allocate net new investments to gen AI.

Exhibit 4: Enterprises' total gen AI budgets

Source: Everest Group (2025)



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RoI is the gatekeeper to unlocking budgets

The message from the CFO offices' is clear: no scale without early wins. Enterprises must prove tangible improvements, such as cost takeout, better CSAT, or productivity lifts, to justify significant investments.

This pressure to deliver near-term results influences prioritization decisions. Use cases that can demonstrate impact within a quarter or two are getting fast-tracked, while transformative projects with longer horizons remain stuck in planning mode.

The result? A lopsided gen AI portfolio dominated by low-risk, short-cycle initiatives, automated chat summarization, agent assist copilots, or self-serve FAQs, while more strategic enterprise-wide innovations stall.

Focusing only on quick wins risks creating challenges in the medium term. Once the immediate gains are exhausted, enterprises may be left with a fragmented set of AI initiatives, essentially like pieces of a puzzle without a clear picture, making it harder to scale in a coherent and integrated way.

Big ambition without proper architecture

From previous exhibits, we can see (56%) enterprises expect to scale gen AI in the next two years. But today, only 27% have done it. Around 67% have scaled less than 40% of their pilots. The gap, again, is not ambition but operational readiness and a robust long-term strategy.

Exhibit 5a: Top gen AI scaling barriers globally

Source: Everest Group (2025)

Percentage of respondents

55% Balancing automation with human roles and workforce shifts (e.g., role redefinitions, change management, maintaining human accountability)

52% Cost unpredictability and managing AI operations at scale (e.g., variable cloud costs, long-term cost efficiencies)

49% Maintaining AI model relevance in dynamic environments (e.g., continuous retraining, adapting to business and market changes)

45% Standardizing AI governance and usage frameworks at scale (e.g., ensuring consistency in AI policies, risk management, and monitoring across teams)

40% Managing AI's environmental and energy consumption impact (e.g., aligning AI adoption with sustainability goals, optimizing compute resources)

33% Expanding AI adoption across different business units and geographies (e.g., localization challenges, diverse use cases, regulatory variations)

23% Ensuring long-term innovation and continuous investment in AI (e.g., sustaining leadership support, avoiding stagnation, keeping up with AI advancements)

Exhibit 5b: Top 5 gen AI scaling barriers across regions

Source: Everest Group (2025)

X is ranking of challenges encountered by respondents

Barriers in scaling (Key challenges faced by enterprises in expanding and operationalizing AI solutions)	North America	EMEA	LATAM	APAC
Balancing automation with human roles and workforce shifts	1	3	1	2
Standardizing AI governance and usage frameworks at scale	2	4	2	5
Cost unpredictability and managing AI operations at scale	3	2	3	1
Maintaining AI model relevance in dynamic environments	4	1	-	3
Managing AI's environmental and energy consumption impact	5	5	5	4
Expanding AI across business units and geographies	-	-	4	-

Now, we discuss the top scaling barriers, as highlighted in Exhibit 5:

- **Balancing automation with workforce shifts** is the most frequently cited challenge, highlighting the need for structured change management, clear communication, and redefined roles. Without these, even strong pilots fail to gain operational traction
- **Governance at scale** continues to be a pressing issue, as enterprises struggle to define consistent policies for explainability, responsible use, and risk mitigation, creating organizational hesitation and compliance bottlenecks
- **Unclear AI operations and cost unpredictability** signal a deeper issue, with many enterprises lacking dedicated AI ops capabilities, budget planning, or monitoring frameworks, leading to abandoned pilots and reactive scaling decisions

This friction is not abstract. As one senior AI lead from a global healthcare company shared: Without playbooks, AI ops, or governance protocols, projects lose momentum at the edge of scale. The result? Strategic initiatives stall in the **last mile**.

> ### Everest Group take
> To close this execution gap, enterprises must treat gen AI not as a project but as a core capability. This shift requires more than frameworks; it demands institutional muscle: consistent decision rights, embedded accountability, clear value-measurement models, and strong cross-functional collaboration. Structured frameworks and strategies lay the foundation for this shift. They ensure repeatability and compliance and enable enterprises to align experimentation with ownership, scale with governance, and outcomes with control.

The disciplined path to scaling AI

Scaling AI demands execution discipline. Enterprises need a clear sequence of actions that move pilots into production while minimizing risk. Exhibit 6 outlines how leaders can translate intent into outcomes by aligning readiness, governance, and execution.

Exhibit 6: Scaling AI: key steps and indicators to track

Source: Everest Group (2025)

Establish strategic intent and organizational readiness		**Signals to track**
Define 3-5 high-impact value pools aligned to business outcomes (cost, revenue, CX, risk), and appoint executive sponsors and clarify ownership models	Conduct an enterprise readiness check across data, tech, risk appetite, and leadership alignment	• Percentage of value pools with named sponsors • Readiness scorecard index • Executive OKR alignment ratio
Build a governed, production-grade AI foundation		
Create an API-first, scalable platform with managed MLOps, telemetry, rollback, and observability. Then, catalog and prepare core data assets	Codify risk and compliance into policy-as-code, and form a Design Authority with cross-functional governance rights	• Model deployment lead time • Number of initiatives reviewed by the AI Council • Critical incident rate
Institutionalize investment discipline and value-linked execution		
Pre-commit multi-year funding tied to business cases and defined exit paths (kill, iterate, scale)	Operate a healthy funnel for use cases with strong business and technical feasibility	• Percentage of funded use cases with kill/scale logic • Pilot-to-scale conversion rate • Time-to-investment decision
Enable reusability, workforce integration, and delivery agility		
Deploy cross-functional pods combining product, domain, and AI/tech skills, while continuously upskilling target personas across BUs	Create libraries of reusable prompts, models, and connectors, and establish incentive mechanisms to drive reuse	• Component reuse ratio • Percentage of trained high-impact personas • Prompt/Component adoption versus rebuild ratio
Embed feedback loops and track portfolio-level impact		
Use a unified KPI framework to monitor RoI, productivity, risk, and CX impact across scaled initiatives, and institutionalize rapid iteration and shared learning	Capture learnings through post-mortems, playbooks, and quarterly reuse exchanges	• Benefit realization percentage • KPI delta versus baseline • Scaled user penetration

What gets measured is what scales. These indicators help leaders assess whether AI efforts are delivering real value or generating only activity. Enterprises that monitor them consistently will know when to accelerate, when to pause, and when to stop – ensuring pilots evolve into durable business capabilities.

Closing capability gaps through strategic partnering

Enterprises may understand where they need to go with gen AI, but that does not mean they have the capabilities to get there. Few organizations possess the internal depth to execute seamlessly across strategy, infrastructure, governance, experimentation, and scaled rollout.

Furthermore, enterprises are not choosing between build or buy; they are choosing both. According to Exhibit 7, a hybrid adoption model is the preferred approach for most enterprises globally, with 63% opting to blend in-house and external capabilities. This trend is more pronounced in APAC (77%), where talent shortages and operational agility concerns compel firms to rely on partnerships. In contrast, EMEA and the Americas show a relatively higher appetite for internal development and outsourcing-led models, suggesting regional maturity and regulatory context influence how enterprises scale gen AI.

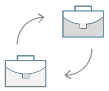
Exhibit 7: Preferences for gen AI adoption models

Source: Everest Group (2025)

	Percentage of respondents			
	Global	America	EMEA	APAC
Hybrid approach	63%	60%	59%	77%
Primarily outsourcing to external service providers	21%	22%	24%	13%
Primarily developing in-house capabilities	16%	18%	17%	10%

Enterprises that scale gen AI successfully do so by partnering strategically to close vital capability gaps, reduce execution risk, and accelerate time-to-value. Below are six areas where partnerships can make the greatest impact:

1



Clarifying where gen AI drives material business value
Many organizations lack a clear, quantified view of where gen AI delivers the greatest P&L impact. Strategic partners can help define 3-5 priority value pools, build robust business cases, and translate AI outcomes into board-level KPIs. This alignment is foundational for securing capital, executive ownership, and organizational focus.

2

De-risking implementation through AI-native governance and compliance
As AI increasingly intersects with privacy, ethics, and regulation, internal compliance and legal teams often lack the technical depth to govern effectively. Partners equipped with policy-as-code tooling, red-teaming protocols, and audit frameworks can help enterprises manage risk without stifling innovation.

3

Building modular, production-grade platforms and data architecture
Enterprise engineering teams may be stretched thin or lack the specialized expertise required to build AI-ready infrastructure. Strategic partners can accelerate deployment of API-first architectures, MLOps pipelines, observability layers, and data lineage – preconditions for running gen AI reliably at scale.

4

Scaling through reusable components and workforce readiness
Production-scale gen AI is not a one-off initiative; it requires reusability and organizational fluency. Partners can provide prompt libraries, evaluation harnesses, and modular connectors, while also supporting the upskilling of high-impact roles and embedding cross-functional delivery pods.

5

Executing high-integrity pilots
The transition from PoC to production is where many enterprises falter. Experienced partners with proven playbooks and domain-specific SMEs can run pilots on production data, supported by rollback mechanisms, telemetry, and iteration protocols, ensuring outcomes are measurable, safe, and repeatable.

6

Moving faster and safer than in-house-only approaches
Strategic outsourcing helps enterprises accelerate timelines and lower risk compared to purely internal approaches. Especially in environments with uneven maturity, distributed business units, or regulatory complexity, the right partners serve as accelerators and risk absorbers.

According to Exhibit 8, 43% of enterprises globally plan to increase their outsourcing budgets via new investment over the next two to three years, a sharp rise from 17% today. This data signals a strategic pivot: outsourcing is no longer just a cost-efficiency play but a growth and transformation lever enterprises are willing to tap into.

Exhibit 8: Enterprises' current and future outsourcing budgets

Source: Everest Group (2025)

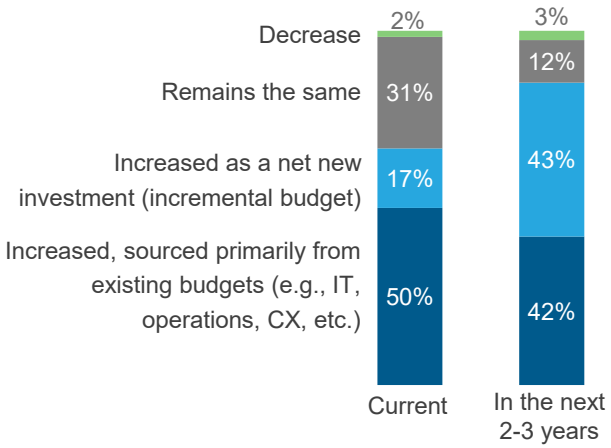
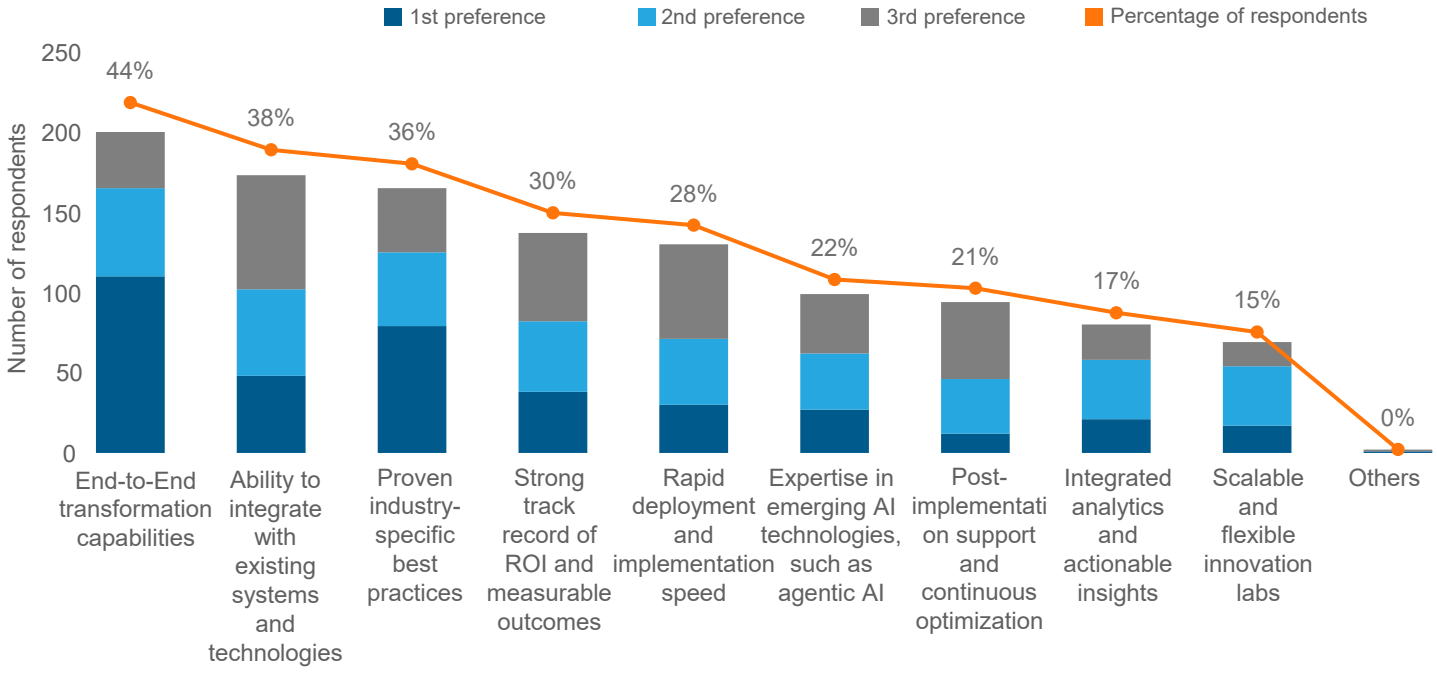


Exhibit 9 highlights how the partner selection criteria have evolved. Enterprises now prioritize **end-to-end transformation capabilities** (44%) and **integration with existing systems** (38%) over innovation labs or AI novelty.

Exhibit 9: Top partner value proposition elements influencing enterprise partnerships

Source: Everest Group (2025)



Around 54% of enterprise respondents cited improving customer experience as a top priority, along with tech modernization, driving revenue growth, and cutting costs (at least 40% cited these as their top priorities). Therefore, enterprises can also consider sourcing partners with a proven record of managing customer-facing operations for an effective customer-centric gen AI solutions implementation.

To operationalize these partnership choices, enterprises must make two foundational decisions: how wide to cast the engagement and how to measure success. Therefore, considering these points, decisions around engagement spans and clear metrics will keep partnership engagements airtight.

Exhibit 10 presents three options for the optimal partner engagement scope for enterprises, while Exhibit 11 details the metrics enterprises can use to enforce accountability and track impact.

Exhibit 10: Deciding the optimal partner engagement span
Source: Everest Group (2025)

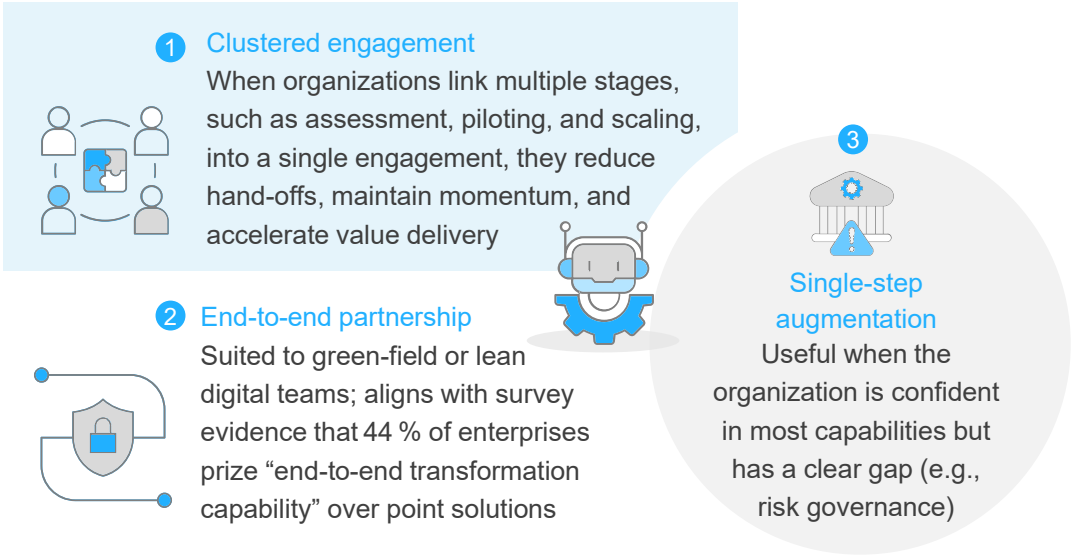


Exhibit 11: Performance metrics to enforce provider accountability

Source: Everest Group (2025)

Time-to-value	Days from contract start to first KPI-validated outcome
Integration friction index	% critical interfaces pared back to “touch-once” deployments (mirrors the 38% selection from respondents on integration skill)
Execution maturity score	Independent audit rating of delivery quality, directly tied to fee at risk
CX uplift delta	Change in CSAT/NPS, critical for enterprises where customer experience remains the top transformation goal

Conclusion

Every enterprise eventually reaches the point where running more pilots no longer generates additional learning. That is where most organizations now find themselves with AI. The pilot phase has served its purpose for experimentation, but it is quickly becoming a bottleneck.

The lesson is clear: scaling AI requires more than enthusiasm. It demands honest readiness assessments to understand where the organization truly stands, disciplined strategic steps that tie initiatives to enterprise priorities, and deliberate choices about when to bring in partners to accelerate execution. Without this discipline, leaders risk wasting capital and credibility on projects that never move beyond the lab.

This is the moment for executives to act decisively. The enterprises that will lead in the AI era are those that stop treating pilots as proof of innovation and start treating scaled adoption as the true measure of competitiveness. That means shifting focus from experiments to outcomes, embedding governance and skills into the operating model, and insisting on repeatability and accountability at every stage.

AI will not transform organizations by accident. It will only do so when leaders commit to moving beyond pilots, aligning ambition with operational clarity and investing in the structures that turn intent into impact. The call to action is simple: don’t just launch the next pilot – build the capability to scale.

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