



## Weekly Brief

September 30, 2025

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# The Widening AI Value Gap



How much value is your company generating from AI? It's a question I hear more and more often from CEOs, boards, and investors—and one too many executives struggle to answer convincingly.

[Our 2025 study of more than 1,250 companies worldwide](#) reveals an inconvenient truth: despite massive investment, 60% report little to no value. About one-third, 35%, are scaling up but not yet reporting significant progress.

### The Future-Built Company

However, “future-built companies,” representing 5% of respondents, are achieving AI value at scale. Compared with other companies, those that are built for the future achieve five times the revenue increases and three times the cost reductions from AI. They report three-year total shareholder returns that are 3.6 times greater.

These results and returns don't just happen. These companies plan to spend more than twice as much on AI compared with laggards—60% of companies—in 2025.

Future-built companies also have a plan. They have moved beyond pilots and automation projects to reshaping entire functions—R&D, sales, marketing, manufacturing. Our research found that 70% of potential value from AI is concentrated in the core business, not support functions.

## **AI Agents on the Move**

For future-built companies, agents represent the next frontier of advantage, accounting for 17% of AI's total value creation this year—a share expected to nearly double by 2028. Agents can autonomously reason, break down problems, find ways to solve them, and learn from their mistakes.

A third of future-built companies use agents, compared with 12% of companies that are scaling AI and almost none of the 60% that lag in adoption. Overall, this is how the value gap widens: leaders reinvest and accelerate, while others fall further behind.

## **How to Join the 5%**

Incremental AI—small tools, scattered experiments, modest efficiency plays—while seemingly safe, leaves enormous value on the table.

Future-built firms share a set of practices that others can adopt and adapt:

**Pursue a multiyear ambition.** The CEOs of future-built companies put AI at the center of strategy. They set explicit, top-down targets and translate them into sequenced roadmaps that stretch across years, not quarters.

**Reshape and invent.** Rather than automating at the margin, these companies redesign end-to-end workflows and launch entirely new businesses. AI changes outcomes, not just processes.

A leading electronics manufacturer transformed its operations by centralizing GenAI into a scalable platform that connected AI infrastructure, manufacturing, and frontline operations. This shift enabled 80% automation of critical workflows—such as production planning and defect diagnostics—in more than 200 factories.

**Adopt an AI-first operating model.** Future-built companies treat AI as the central nervous system. They balance decentralized innovation with oversight from the center. They redesign human

roles in new workflows. They invest in strategic workforce planning for AI.

**Secure and enable talent.** These companies recognize that scaling AI requires access to scarce talent, and they act decisively to attract, retain, and upskill individuals who can orchestrate and oversee AI agents and develop next-generation AI capabilities. They retrain and upskill current staff while redesigning their place in workflows.

**Use fit-for-purpose technology and data.** Future-built companies create a flexible, modular technology stack and a data foundation built on central AI platforms, reusable agents, and interoperable architectures. They use a hybrid build-buy approach, balancing in-house development with outside partners and ecosystems.

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CEOs need an AI roadmap that is based on more than FOMO—the fear of missing out. The 5% of companies that are future built have shown the way forward. We project that next year up to 10% of companies will be future built. Will yours be one of them?

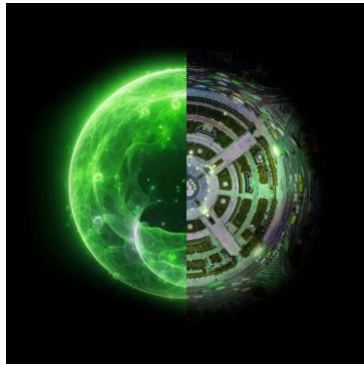
Until next time,

A handwritten signature in black ink, appearing to read 'Christoph'.

**Christoph Schweizer**  
Chief Executive Officer

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**Further Insights**



### **The Widening AI Value Gap**

Future-built companies are pulling away, creating new businesses and riding the new wave of agents. Others need to catch up.

[CLOSE YOUR AI VALUE GAP](#)



### **SAP's Christian Klein on Reinventing a Tech Giant for Long-Term Success**

Just a few months after becoming CEO, Christian Klein realized that SAP had to transform its legacy business model or risk falling behind.

[WATCH HOW SAP REINVENTS](#)



### **CEOs + Data: A Match Made for AI**

Data is a strategic lever for getting ahead in a world that is rapidly transforming with AI.

[OWN THE AI AGENDA](#)