



# AI Everywhere: The C-Suite Perspective

TechTalk AI Summit,  
February 5<sup>th</sup>, 2024  
St. Petersburg Florida

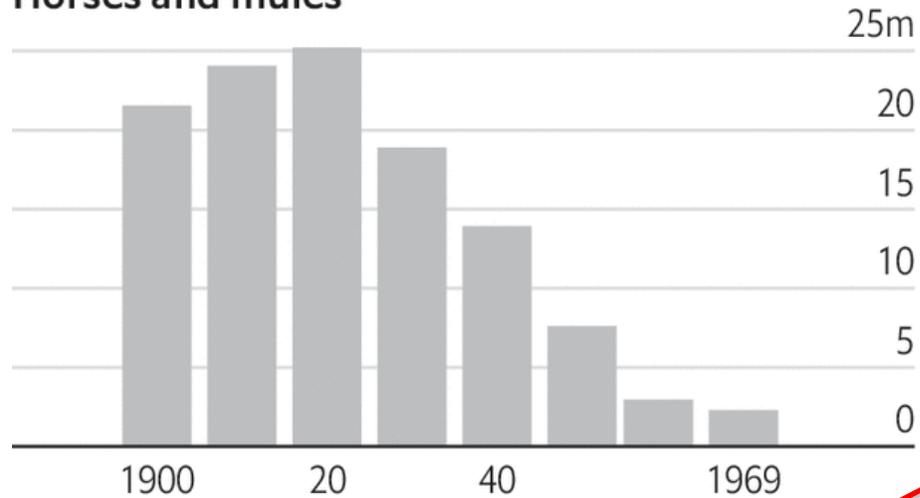
Philip Carter,  
Group Vice President, Thought Leadership Research at IDC

The first tractors were commercially available in the US in the early 1900s...

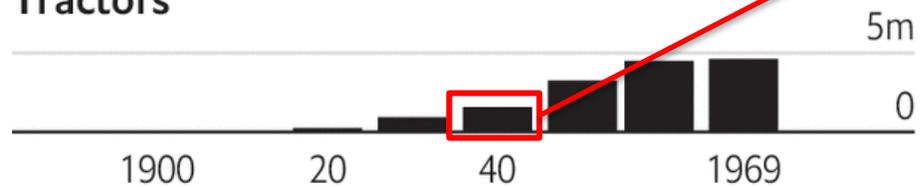


## United States, 1900-69

### Horses and mules



### Tractors



Source: United States Census of Agriculture

However, by 1940, only 23% of farmers owned a tractor...

# Why?

Metal tires meant the many tractors kept getting stuck in the mud and were not as safe as expected

People needed to be trained to drive and use the tractors effectively

Premium pricing meant that hiring someone to manage a horse was significantly more economically viable

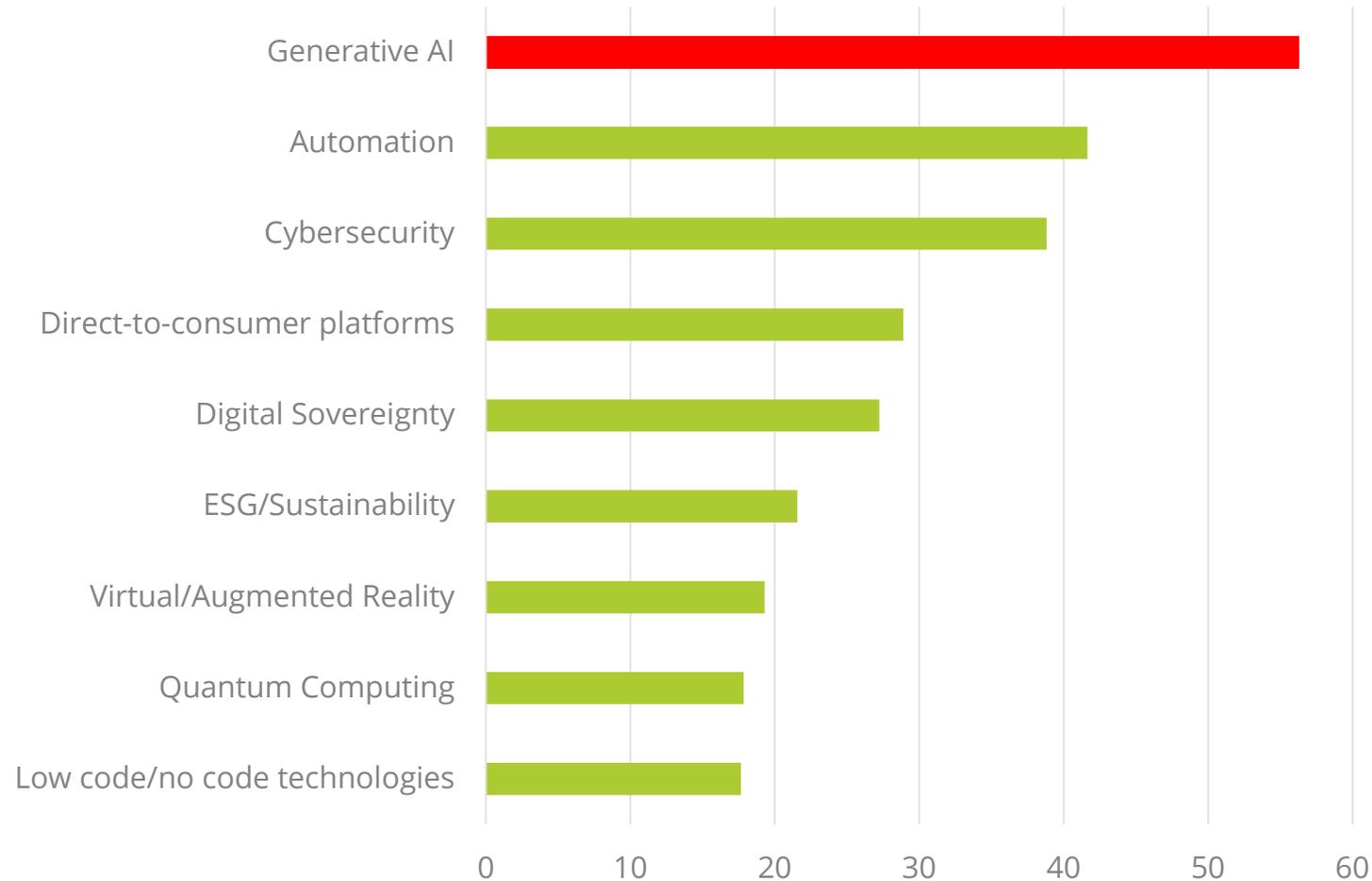
Farms were too small to justify the investment





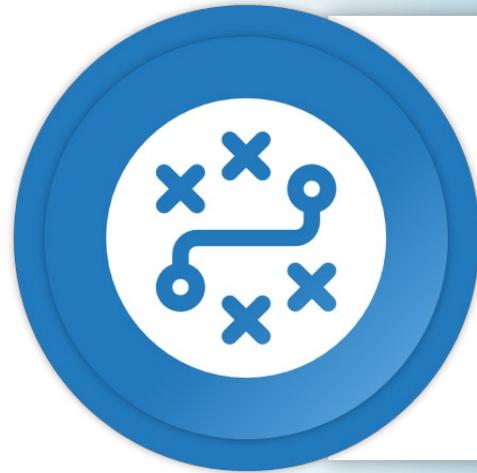
# Generative AI is Top of the List of Tech Priorities for the C-Suite

Which of the following technology areas is top of mind for the C-Suite in terms of new investments for the next 12 months?



# 5 AI Barriers that the C-Suite Are Looking to Overcome in 2024





**What are the target  
GenAI business  
outcomes?**

# Most Important Outcomes of Generative AI

## Top 3 Outcomes for the C-Suite

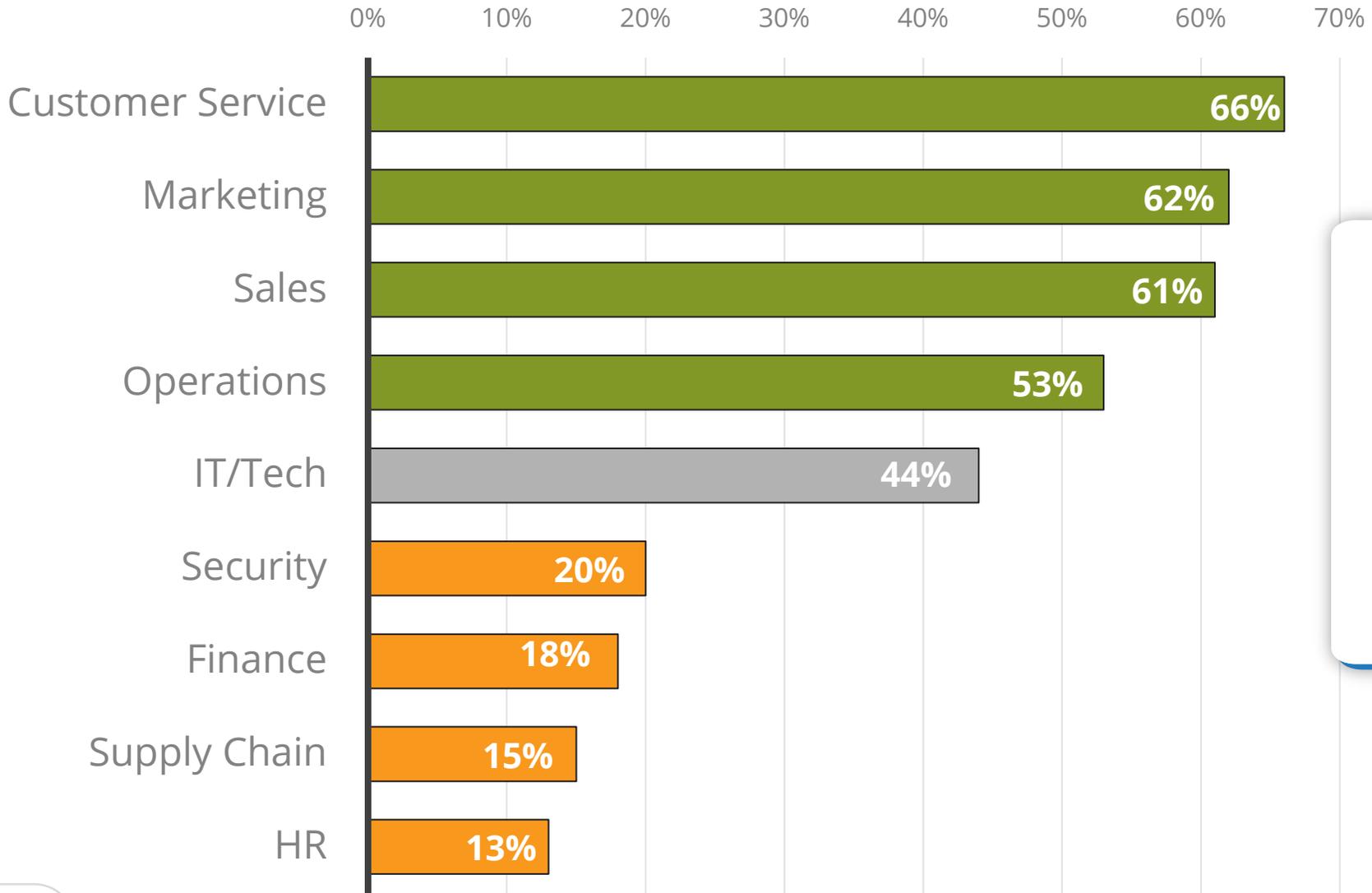
### Near Term



### Long Term



# Proportion of C-Suite Executives Actively Funding GenAI initiatives in 2024

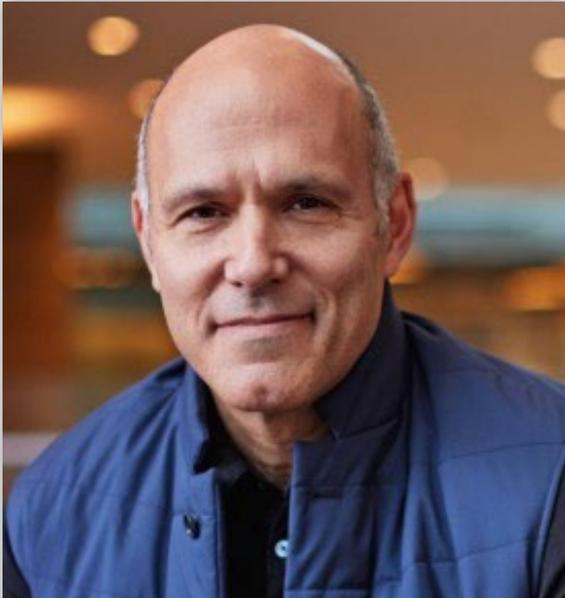


**The  
business is  
leading the  
charge**

# The Productivity Pivot



# The Experience Advantage



## Transform the Customer Experience

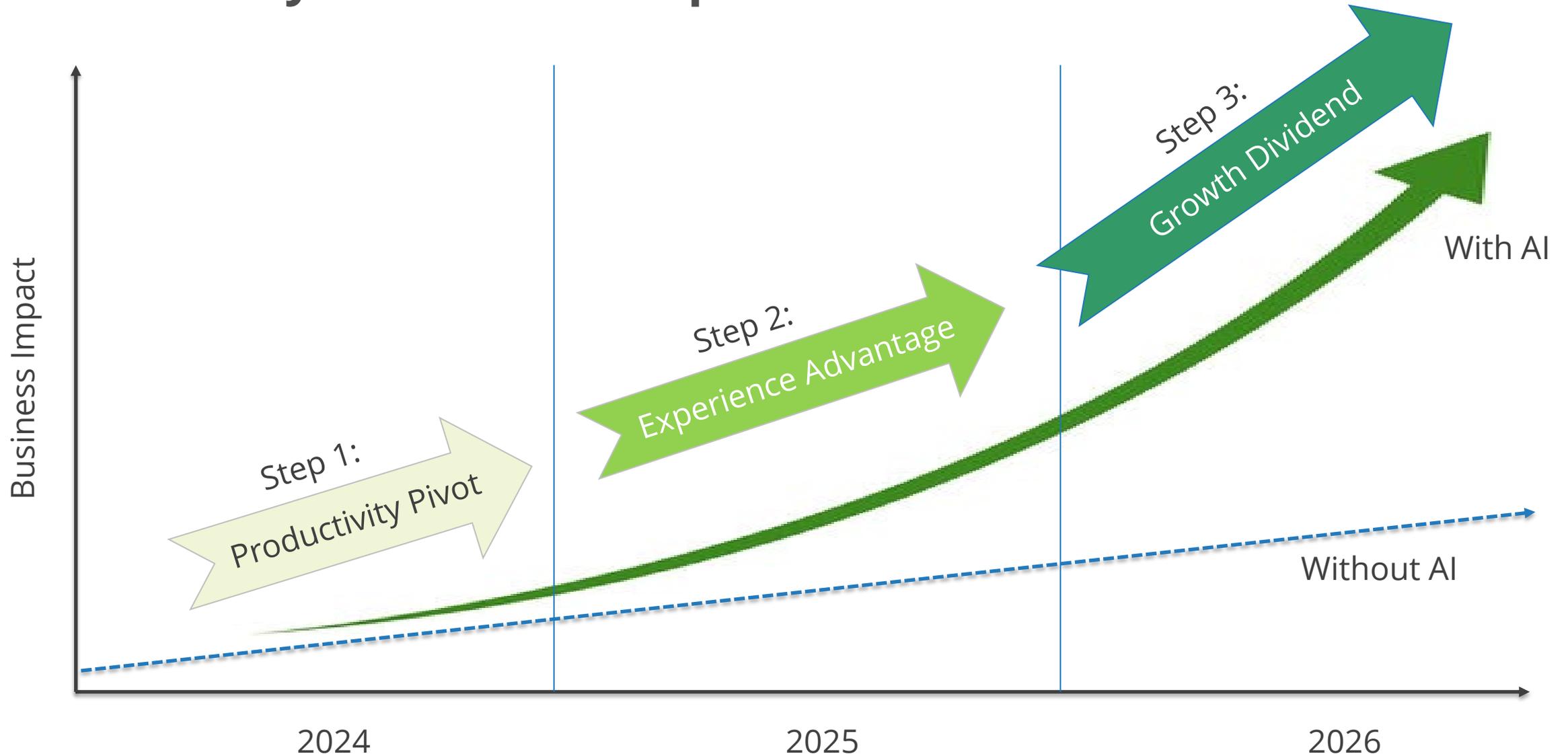
“We're looking at adding those models into experiences when you're searching so you could say, ‘what do people think?’ And it would give it to you in a summary, instead of going through 1,000 reviews.”

Peter Maxwell Kern, Vice Chairman & CEO, Expedia

# The Revenue Dividend



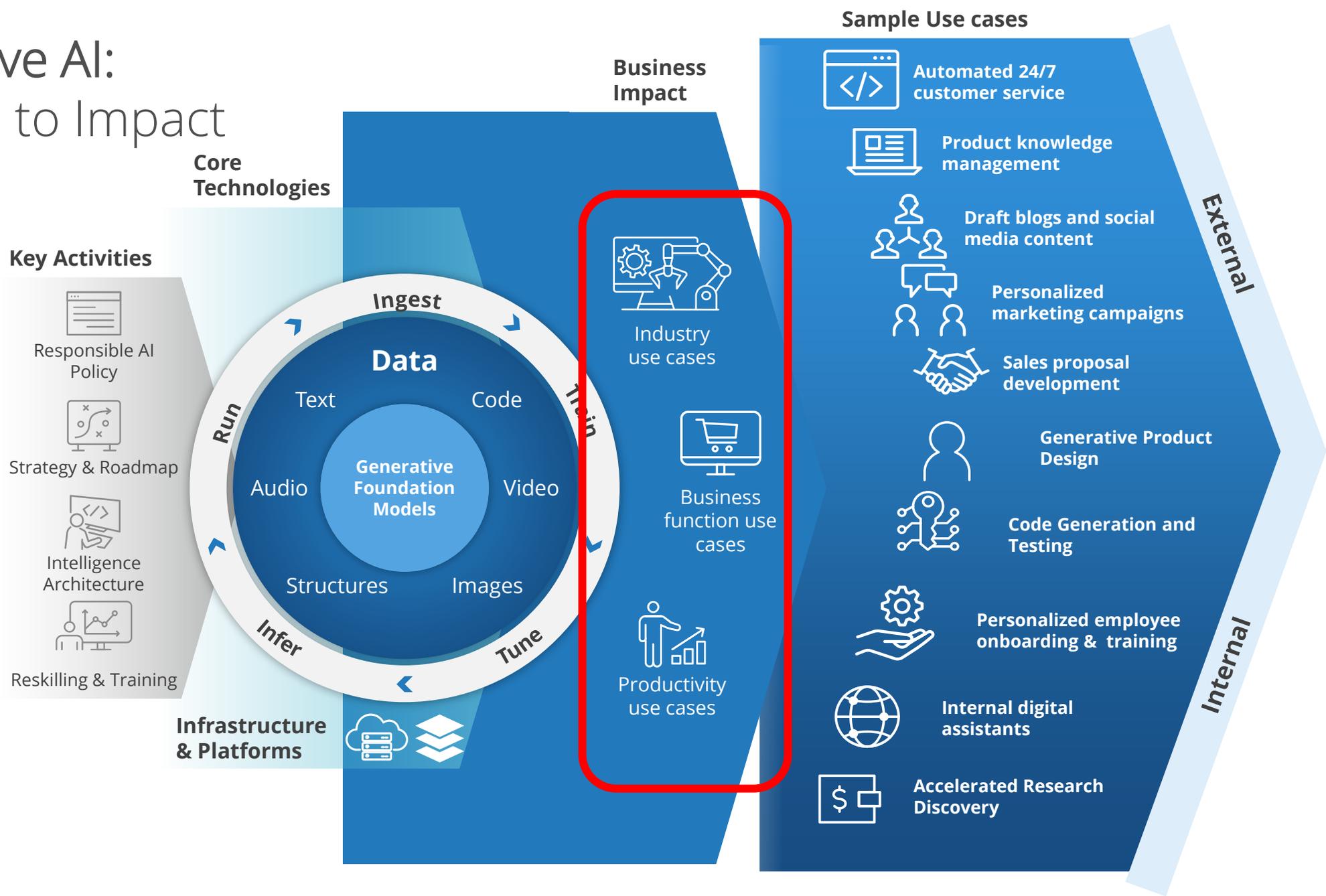
# The AI Everywhere Roadmap



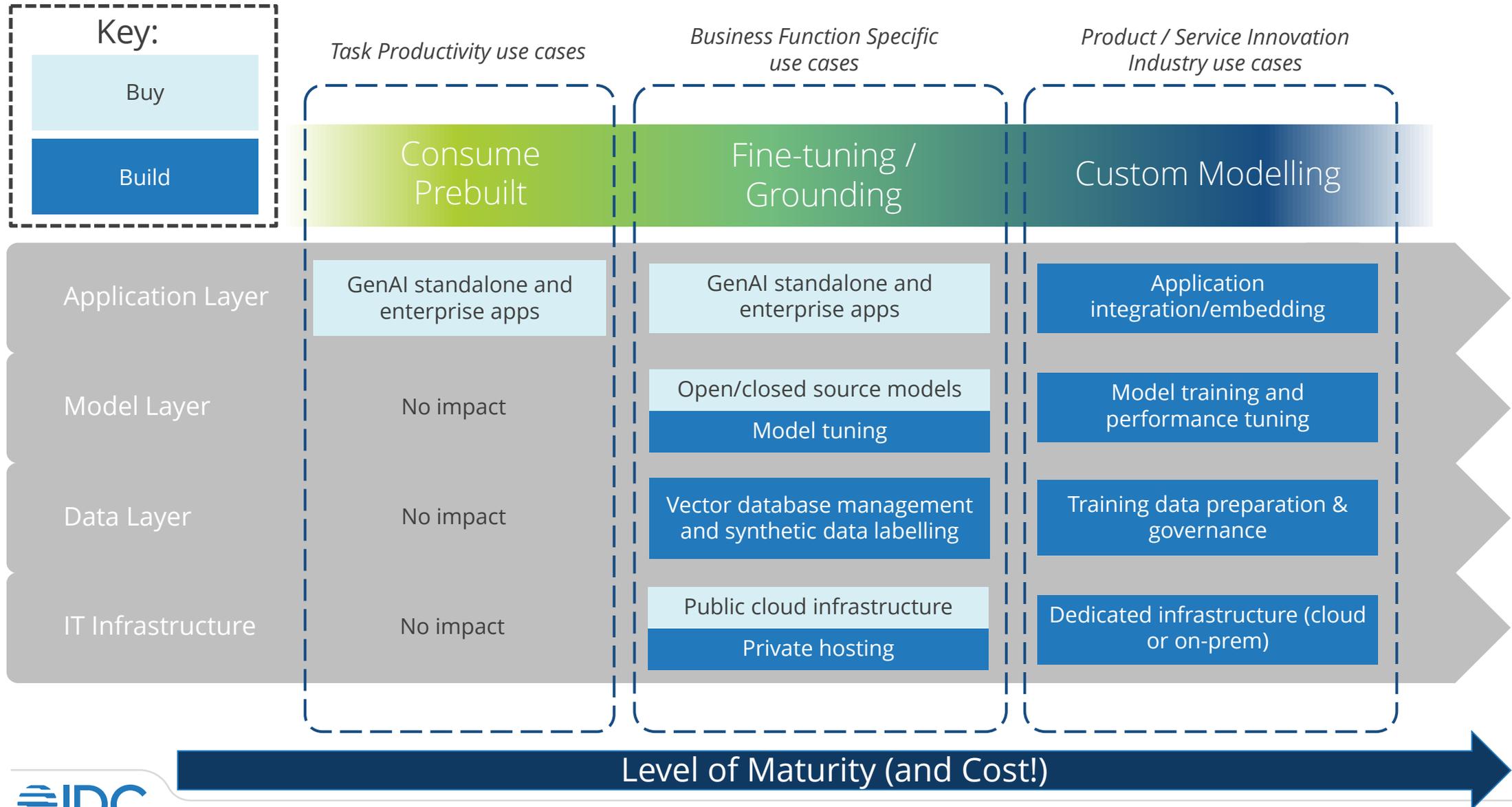


# Which Use Cases Will Move the Needle

# Generative AI: The Path to Impact



# Implementation Choices Are Complex, and Must Be Managed



### Model Build and Orchestration

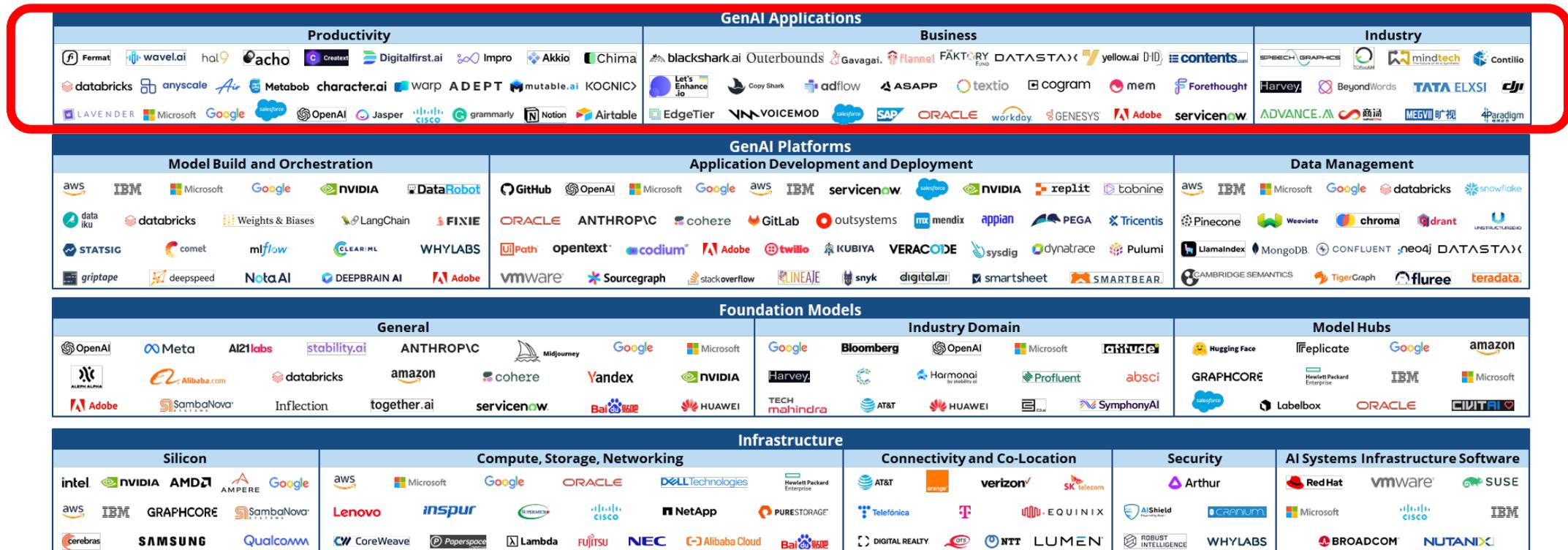
**The Build Option:**

### Data Management

GenAI Platforms				
Model Build and Orchestration	Application Development and Deployment		Data Management	
aws, IBM, Microsoft, Google, NVIDIA, DataRobot, dataiku, databricks, Weights & Biases, LangChain, FIXIE, STATSIG, comet, mlflow, CLEAR.ML, WHYLABS, griptape, deepspeed, NotaAI, DEEPBRAIN AI, Adobe	GitHub, OpenAI, Microsoft, Google, aws, IBM, servicenow, Salesforce, NVIDIA, replit, tabnine, ORACLE, ANTHROPIC, cohere, GitLab, outsystems, mx mendix, appian, PEGA, Tricentis, Path, opentext, codium, Adobe, twilio, KUBIYA, VERACODE, sysdig, dynatrace, Pulumi, vmware, Sourcegraph, stackoverflow, LINEAJE, snyk, digital.ai, smartsheet, SMARTBEAR		aws, IBM, Microsoft, Google, databricks, snowflake, Pinecone, Weaviate, chroma, drant, UNSTRUCTUREDIO, LlamaIndex, MongoDB, CONFLUENT, neo4j, DATASTACK, CAMBRIDGE SEMANTICS, TigerGraph, fluree, teradata	
Foundation Models				
General	Industry Domain		Model Hubs	
OpenAI, Meta, AI21 labs, stability.ai, ANTHROPIC, Midjourney, Google, Microsoft, NVIDIA, Adobe, SambaNova, Inflection, together.ai, servicenow, Alibaba.com, databricks, amazon, cohere, Yandex, NVIDIA, SambaNova, Inflection, together.ai, servicenow, Alibaba.com, databricks, amazon, cohere, Yandex, NVIDIA, SambaNova, Inflection, together.ai, servicenow	Google, Bloomberg, OpenAI, Microsoft, NVIDIA, Harvey, Harmonai, Profluent, abs-ci, TECH mahindra, AT&T, HUAWEI, SymphonyAI		Hugging Face, replicate, Google, amazon, GRAPHCORE, Hewlett Packard Enterprise, IBM, Microsoft, Labelbox, ORACLE, CORTIX	
Infrastructure				
Silicon	Compute, Storage, Networking	Connectivity and Co-Location	Security	AI Systems Infrastructure Software
intel, NVIDIA, AMD, AMPERE, Google, aws, IBM, GRAPHCORE, SambaNova, cerebras, SAMSUNG, Qualcomm	aws, Microsoft, Google, ORACLE, DELL Technologies, Hewlett Packard Enterprise, Lenovo, inspur, greenconn, CISCO, NetApp, PURE STORAGE, CoreWeave, Paperspace, Lambda, FUJITSU, NEC, Alibaba Cloud, Bai	AT&T, orange, verizon, SK Telecom, Telefonica, T, EQUINIX, DIGITAL REALTY, NTT, LUMEN	Arthur, AI Shield, CRANIUM, ROBUST INTELLIGENCE, WHYLABS	Red Hat, vmware, SUSE, Microsoft, CISCO, IBM, BROADCOM, NUTANIX

IDC Market Glance: Generative AI Technologies and Services

# The Buy Option: GenAI-Native Apps or Embedded GenAI

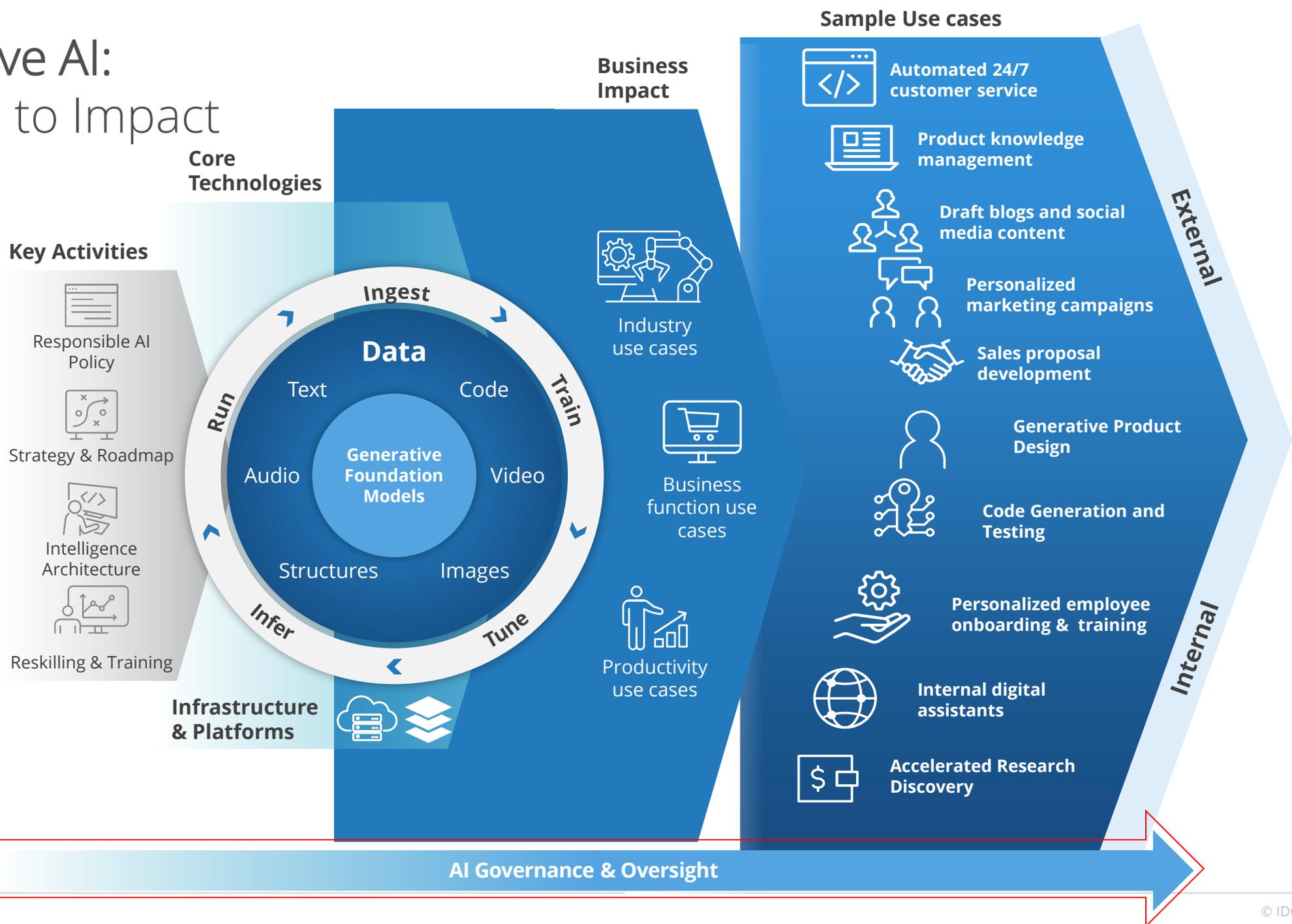


IDC Market Glance: Generative AI Technologies and Services

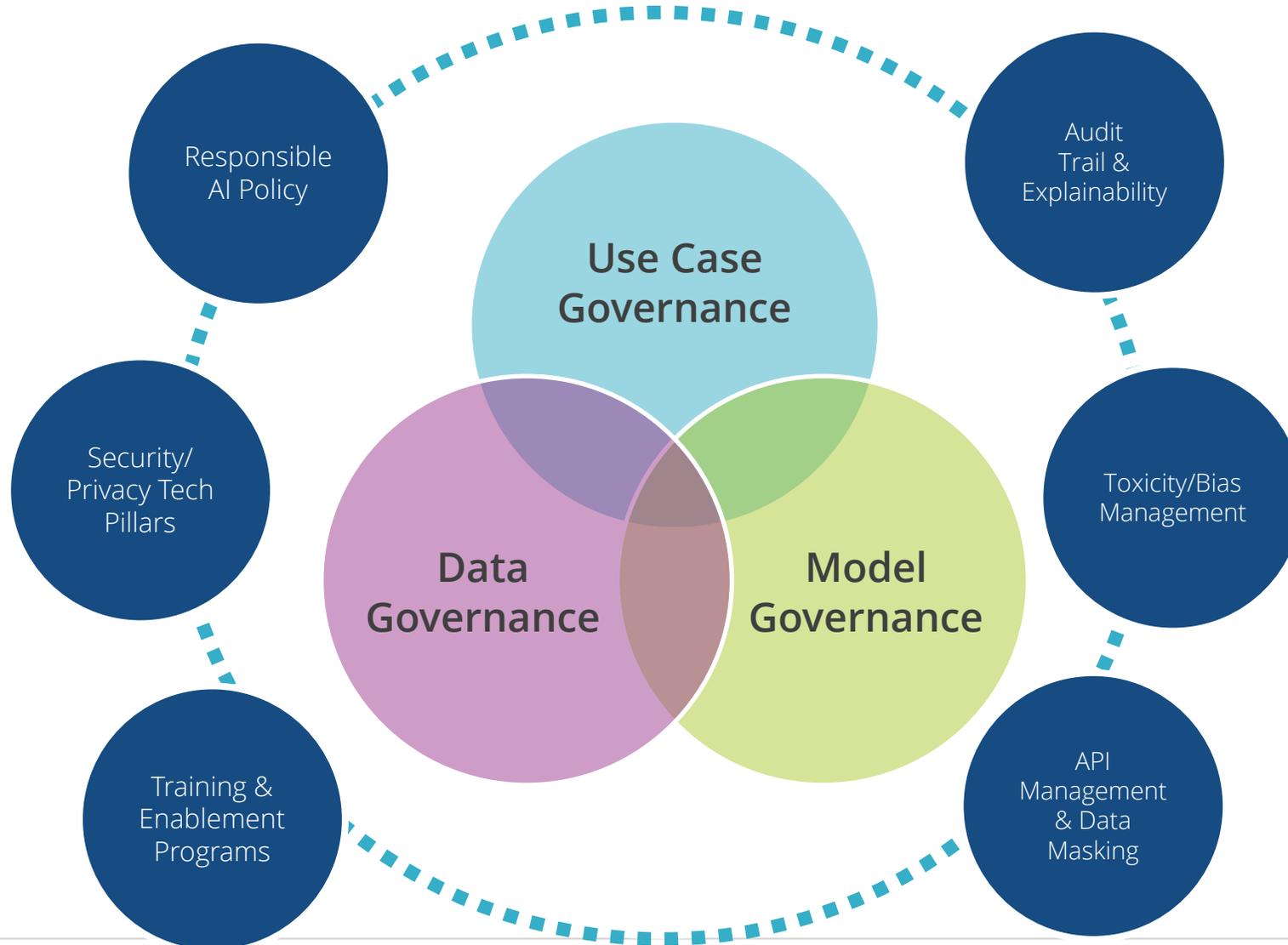


# How do we govern AI Everywhere?

# Generative AI: The Path to Impact

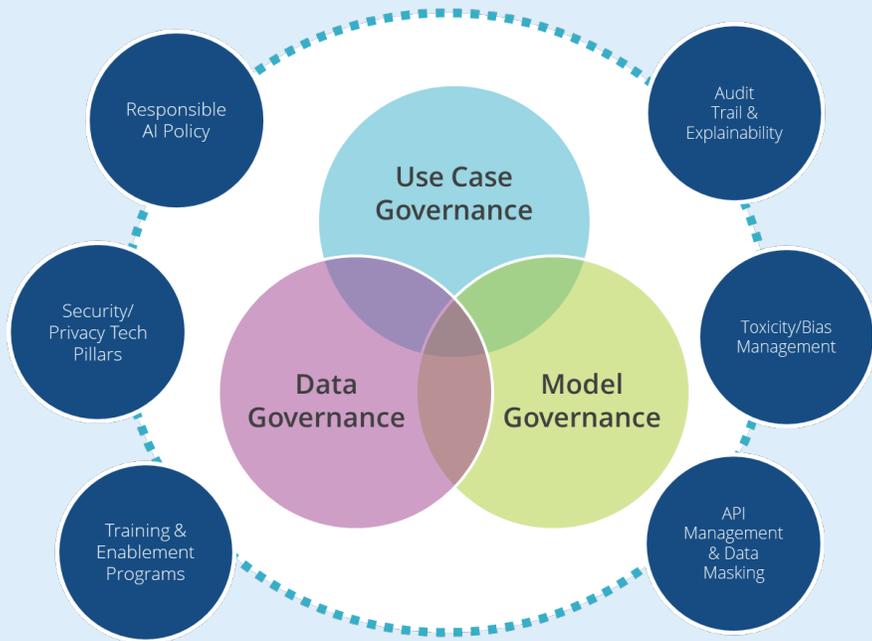


# Building an AI Governance Program



# Aligning With Tech Vendors on AI Governance

## Your AI Governance Program

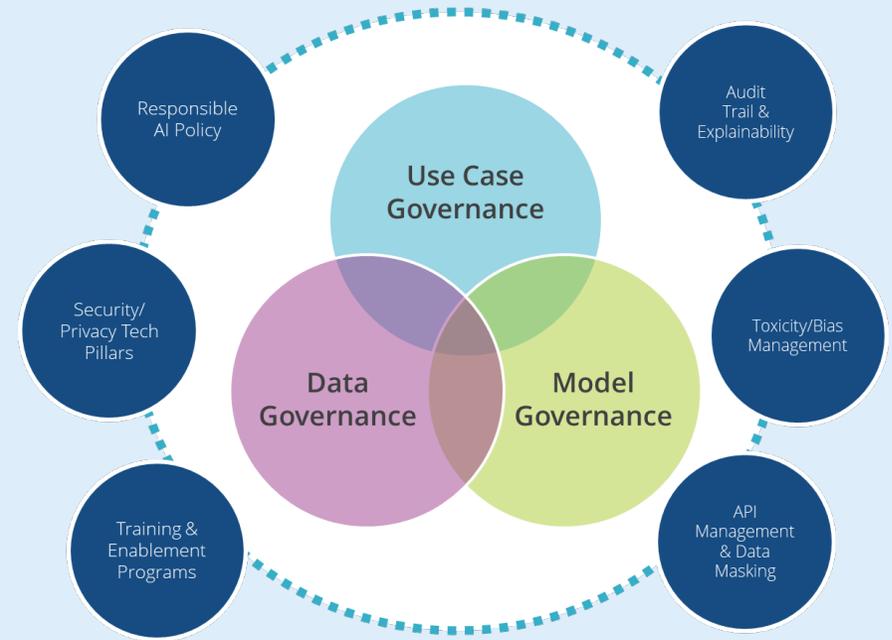


Data for  
Discount

Reframing the  
'SLA'

Roadmap  
Transparency

## Tech Vendor AI Governance Program





# How to develop an AI-enabled talent strategy?

# Reskilling and AI-enabled Automation are the key talent strategies to take advantage of the AI opportunity

Q. Given more extensive use of AI technologies worldwide, which of the following best describes your organization's people and talent focus for 2024?



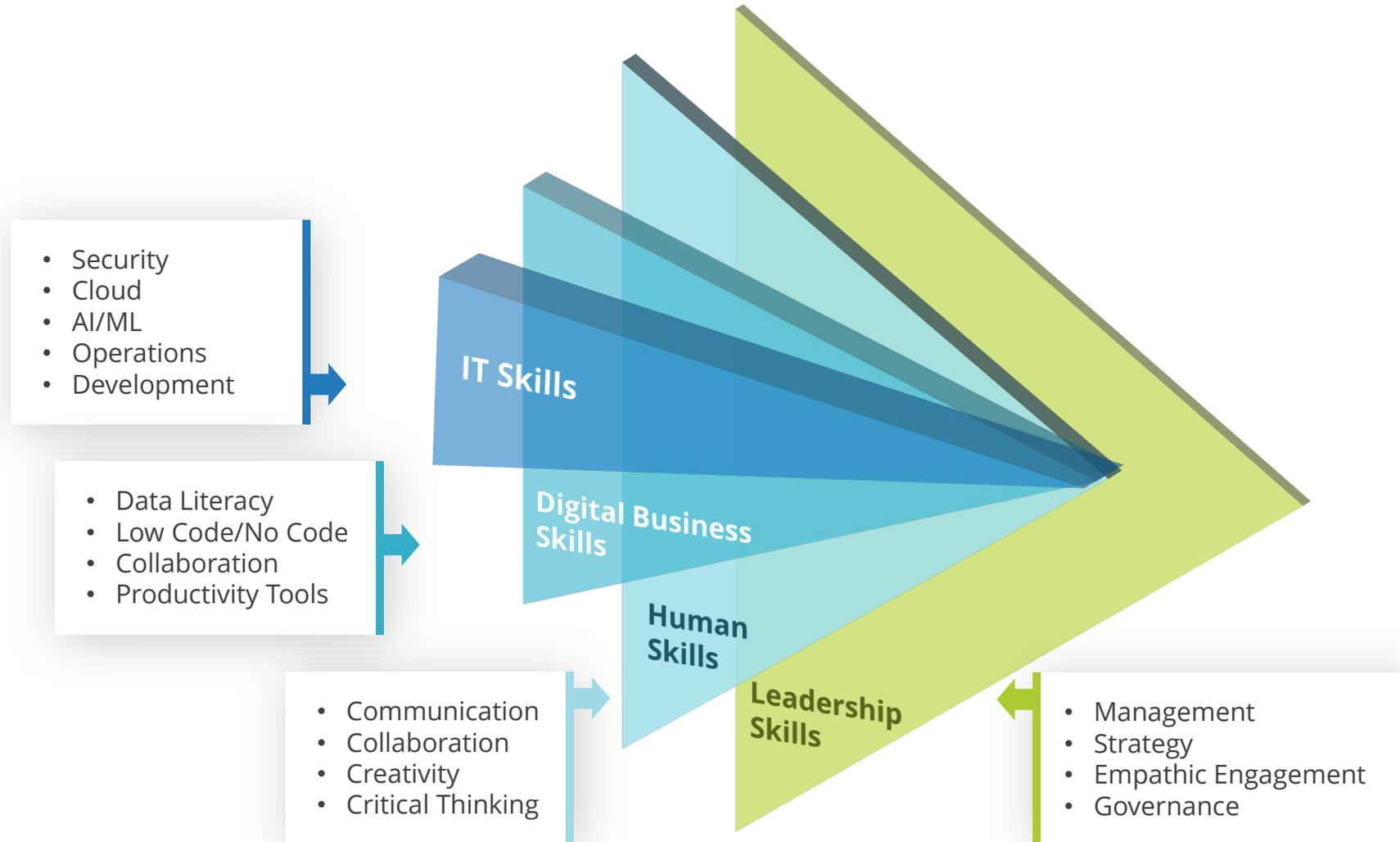
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*AI will not replace your job.  
But someone who knows how  
to use AI better than you... will*

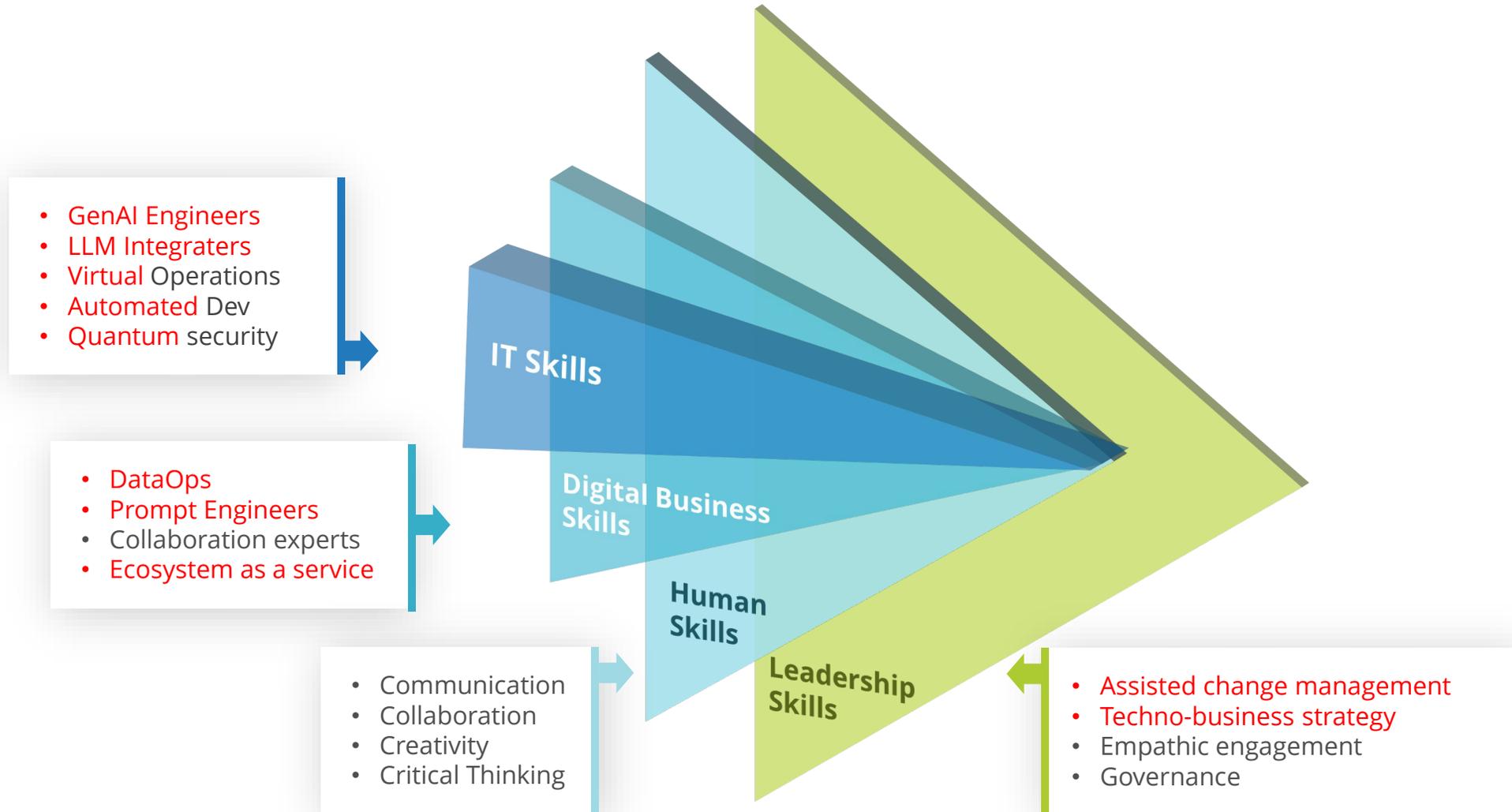
IDC CEO Interview Series 2024

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# IDC Skills Development Framework Circa 2023



# Skills Development Framework Circa 2030

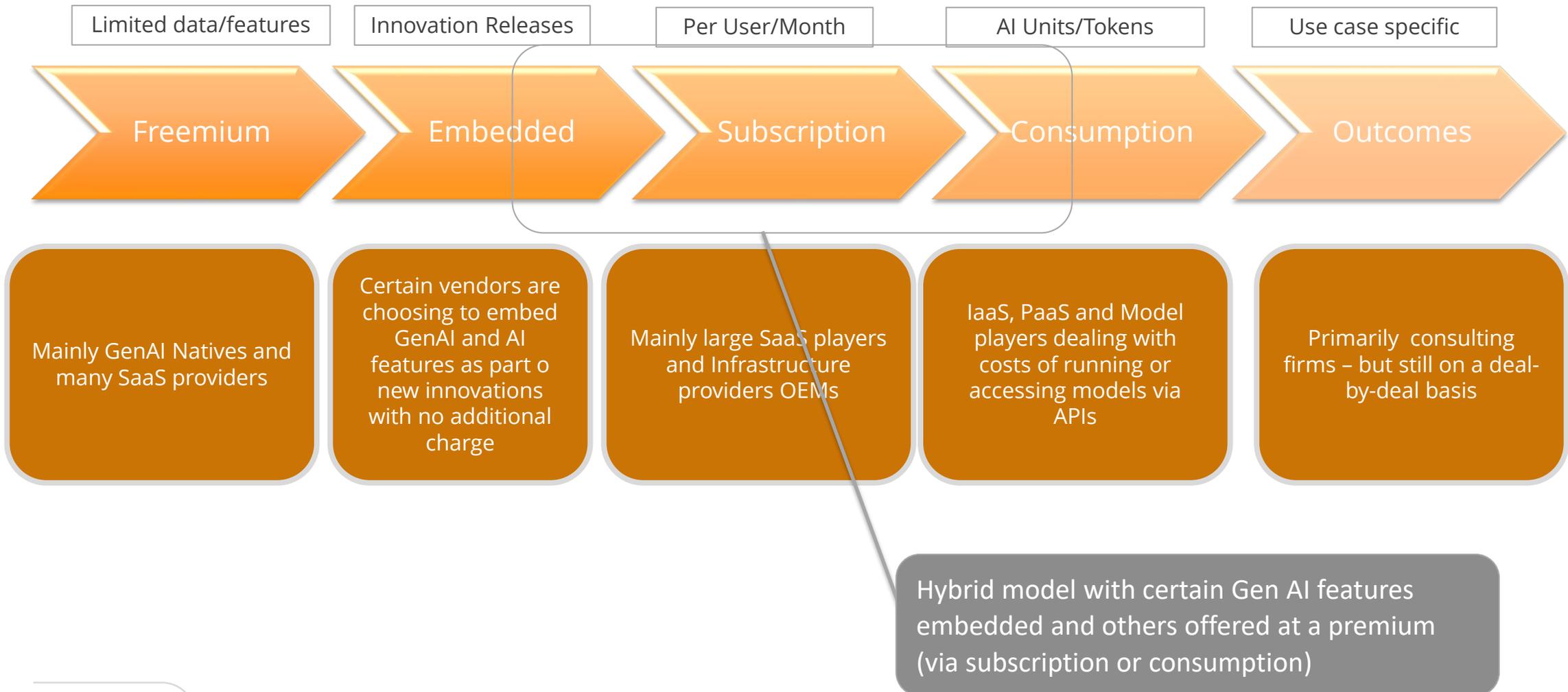


By 2026, the proliferation of data from **GenAI** and other key digital initiatives will result in 25% of the G2000 organizations introducing or elevating the role of **Chief AI Officer** to the C-Suite.



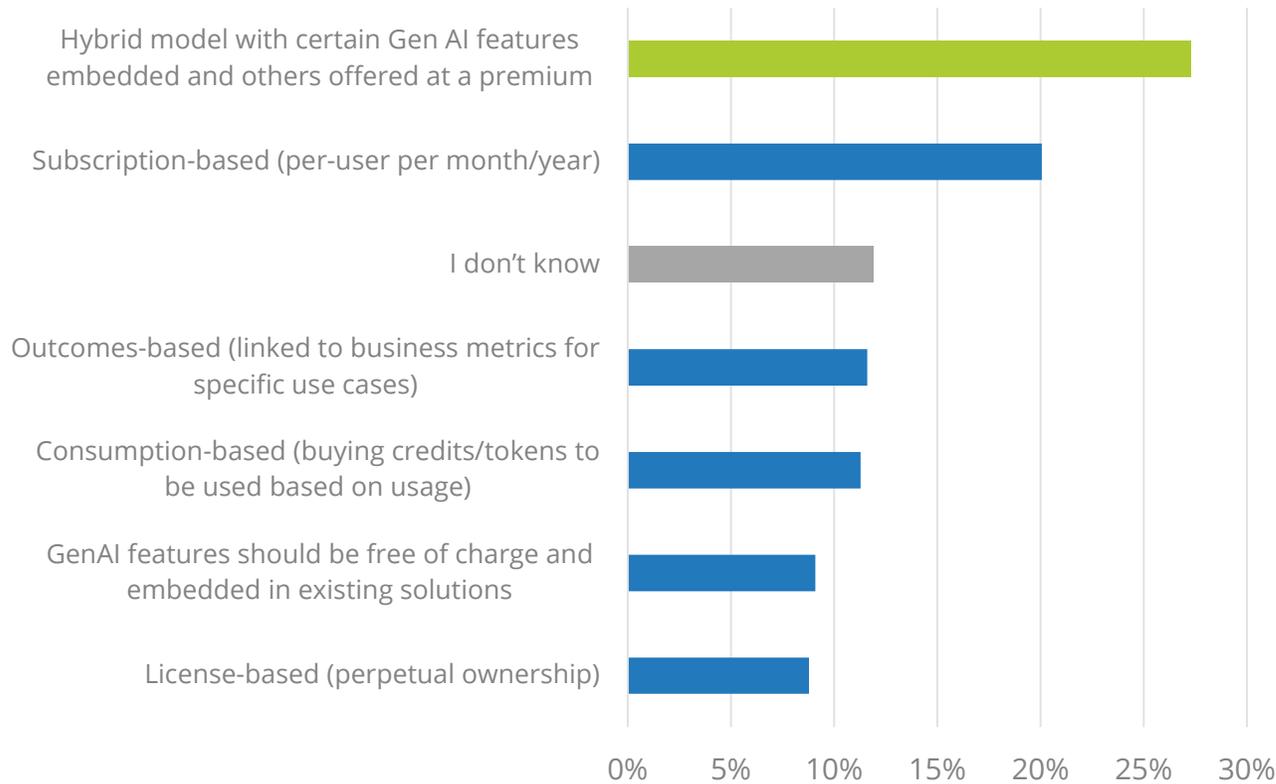
# How will GenAI impact vendor pricing?

# Emerging GenAI Pricing Models

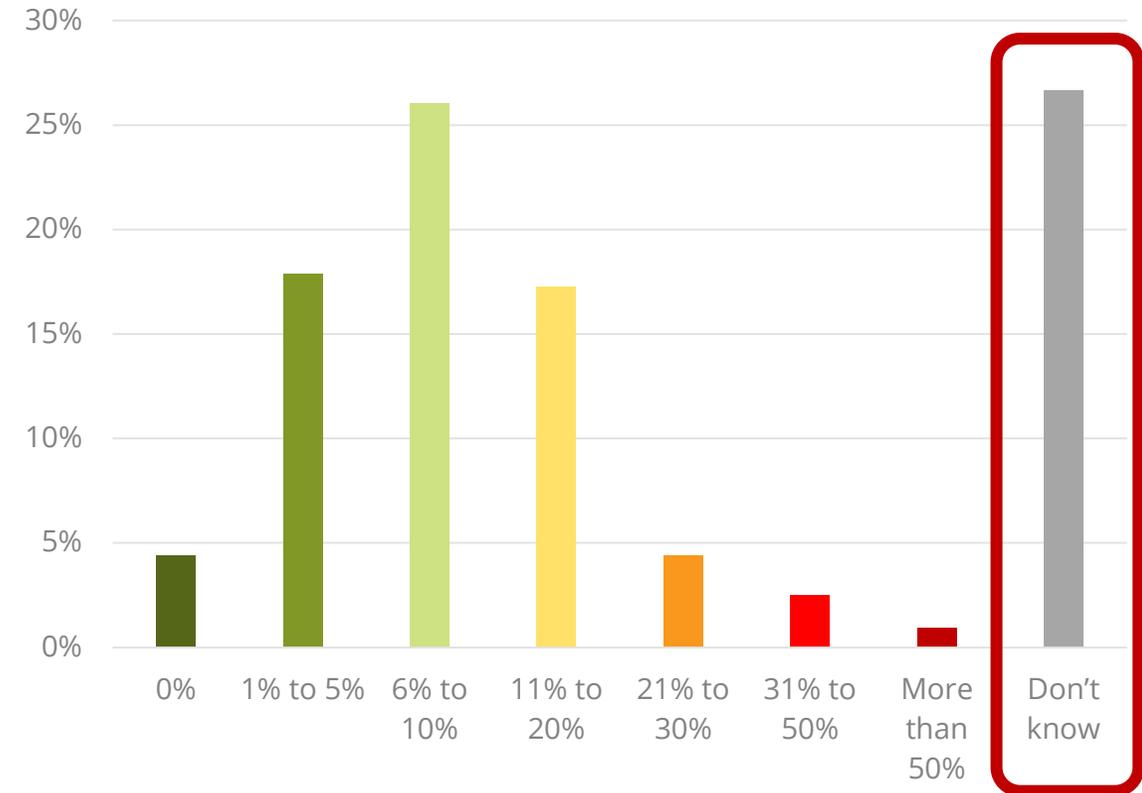


CIOs are leaning towards hybrid and subscription-based pricing for GenAI. However, when it comes to premium pricing over 25% say they don't know how much they'd be willing to pay.

*Q. Which of the following pricing models for GenAI solutions do you think your organization will most likely adopt in 2024?*



*Q. On average, what level of pricing premium would you be willing to pay for compelling GenAI features/capabilities?*



# 5 AI Barriers that the C-Suite Are Looking to Overcome in 2024

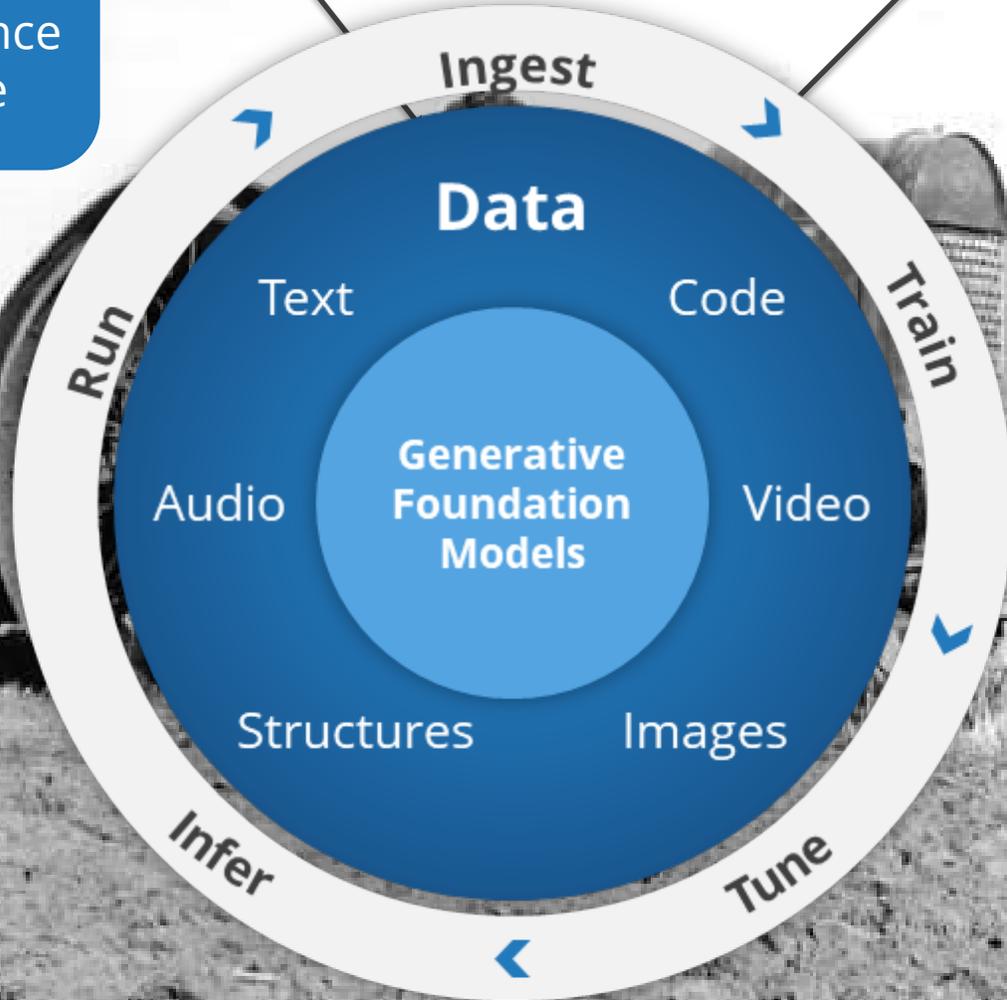


By 2026, 75% of the G2000 will have a formal AI Governance program in place

By 2026, enterprises will leverage GenAI technologies to drive \$1T in productivity gains

By 2026, 25% of the top 20 enterprise technology vendors will have launched multiple outcomes-based AI engagements

By 2027, 50% of the G2000 will be deriving net new revenue streams by infusing AI into digital products, services & experiences







THANK YOU!



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