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State of Generative AI in Technology, Media and Telecom Industry

From Bytes to Brightes:
The AI Advantage in TMT

October 2025

Deloitte AI Institute™

Deloitte's State of Generative AI in the Enterprise Quarter four report

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Executive Summary

As the generative AI landscape evolves, organizations within the Technology, Media and Telecom (TMT) industry are harnessing its transformative potential to redefine their operational frameworks. This report explores the current state and future trajectories of generative AI adoption in TMT, revealing a landscape marked by optimism, strategic intent and a strong commitment to innovation.

TMT organizations report high levels of expertise in generative AI, well above cross-industry averages, alongside significant pressure from both external competitors and internal stakeholders to implement AI tools effectively. They demonstrate a strong preference for building internal AI solutions, fostering agility and innovation. While access to generative AI tools is widespread, actual usage remains modest, highlighting opportunities for deeper workforce engagement and training.

Investment strategies reflect confident optimism, with most firms recognizing the importance of robust risk management and governance frameworks. Although strategy readiness is high, governance and compliance require further development to support responsible scaling. TMT firms also lead in delivering strong ROI and exhibit the highest levels of trust in generative AI technologies among all industries.

The industry actively invests in workforce education and reskilling, supported by rigorous quality assurance practices such as enhanced testing and lifecycle management. Furthermore, TMT organizations are at the forefront of exploring next-generation AI capabilities like autonomous agents, signaling readiness to innovate and transform operational models. Challenges around risks like errors, bias and value realization are acknowledged and met with disciplined governance and long-term strategic commitment.

This report aims to equip C-suite executives and strategic decision-makers with insights into the dynamics of generative AI adoption. By fostering trust, investing in people and embracing innovation, TMT organizations are well positioned to unlock generative AI's full potential and sustain competitive advantage while managing associated risks.

Foreword: Curiosity to Capability

Technology, Media and Telecom (TMT) companies tend to be early adopters of new technologies and we are seeing that with gen AI and even agentic AI. The pace of change in generative AI is unlike anything we've seen before—and nowhere is this more evident than in the TMT industry. What began as curiosity has quickly evolved into capability, with TMT organizations leading the way in creating the chips, infrastructure and models, inventing AI and turning experimentation into enterprise-wide transformation for themselves as an industry.

In conversations with industry leaders, I've noticed a shift: the excitement around generative AI is now infused with ambition and real productivity and financial goals. Companies are no longer asking "what can it do?" but "how do we do it responsibly, at scale, and with purpose to drive towards real business metrics?" This evolution is encouraging—and necessary.

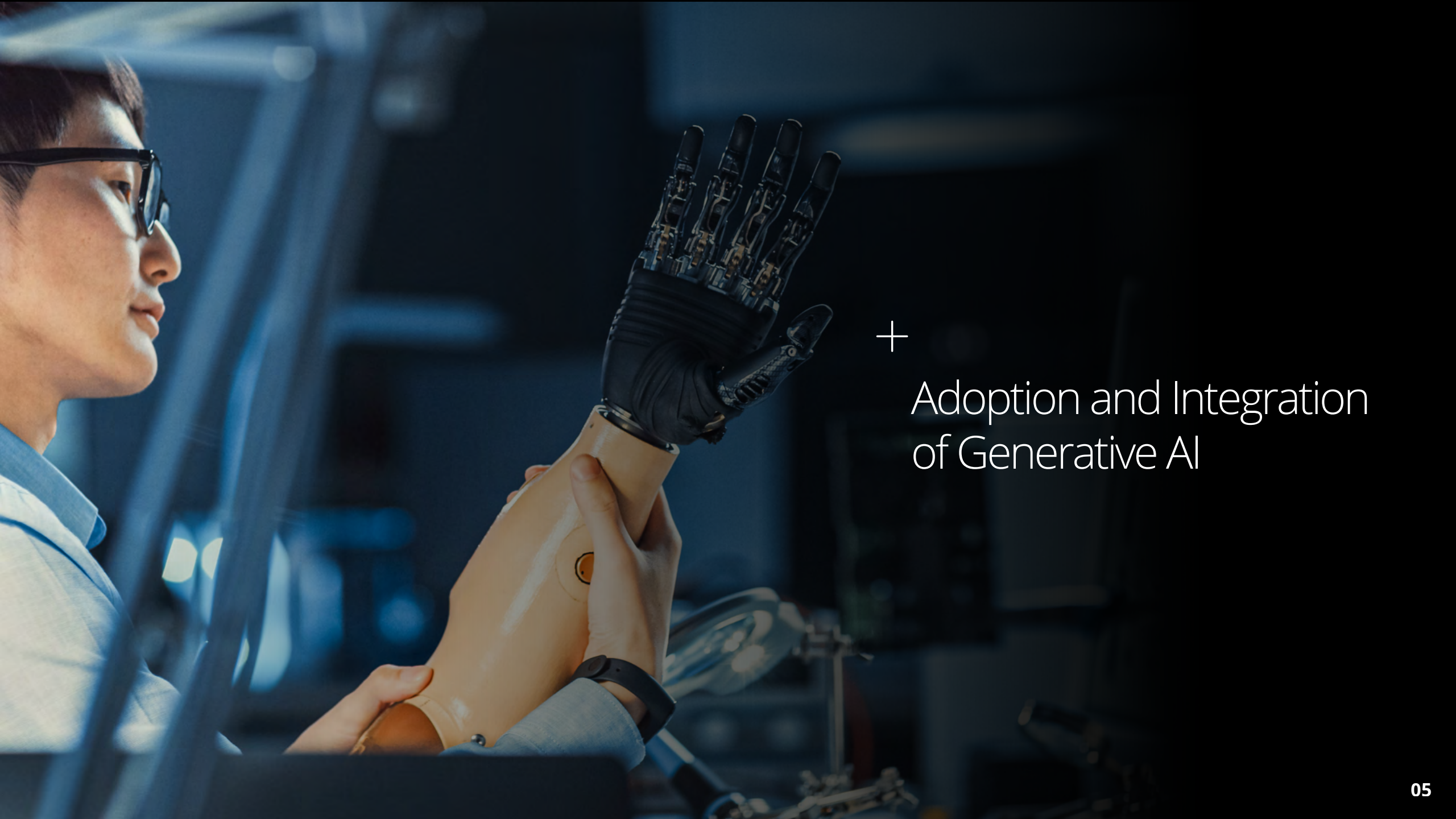
TMT companies are uniquely positioned to shape the future of generative AI. They are inventing the business of AI while transforming themselves with AI. Their deep digital roots, creative culture and appetite for innovation gives them an edge. But with that edge comes responsibility: to build trust, to invest in people and encourage experimentation at all levels of the enterprise and to ensure that technology serves strategy—not the other way around.

As we move forward, I believe the most successful organizations will be those that keep humans and clear business metrics at the heart of their AI journey. Because in the end, it's not just about what generative AI can do—it's about what we choose to do with it.

Learn more about the series and sign up for updates at

http://deloitte.com/us/state-of-generative-ai

– Gillian Crossan, Global Technology, Media & Telecommunications Industry Leader



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Adoption and Integration of Generative AI

Adoption and Integration of Generative AI

Generative AI is now a pivotal reality reshaping the Technology, Media and Telecom (TMT) industry. Organizations in this industry are not just adopting these technologies; they are embedding them deeply into their operations to unlock their full potential more adeptly than any other industry. This chapter examines how TMT firms navigate the complex landscape of generative AI adoption and integration, highlighted by a high level of expertise, pressing pressures for adoption, a balance of opportunities and threats, engaged workforce strategies and innovative integration approaches.

Level of GenAI adoption

Respondents selecting 'at scale implementation'

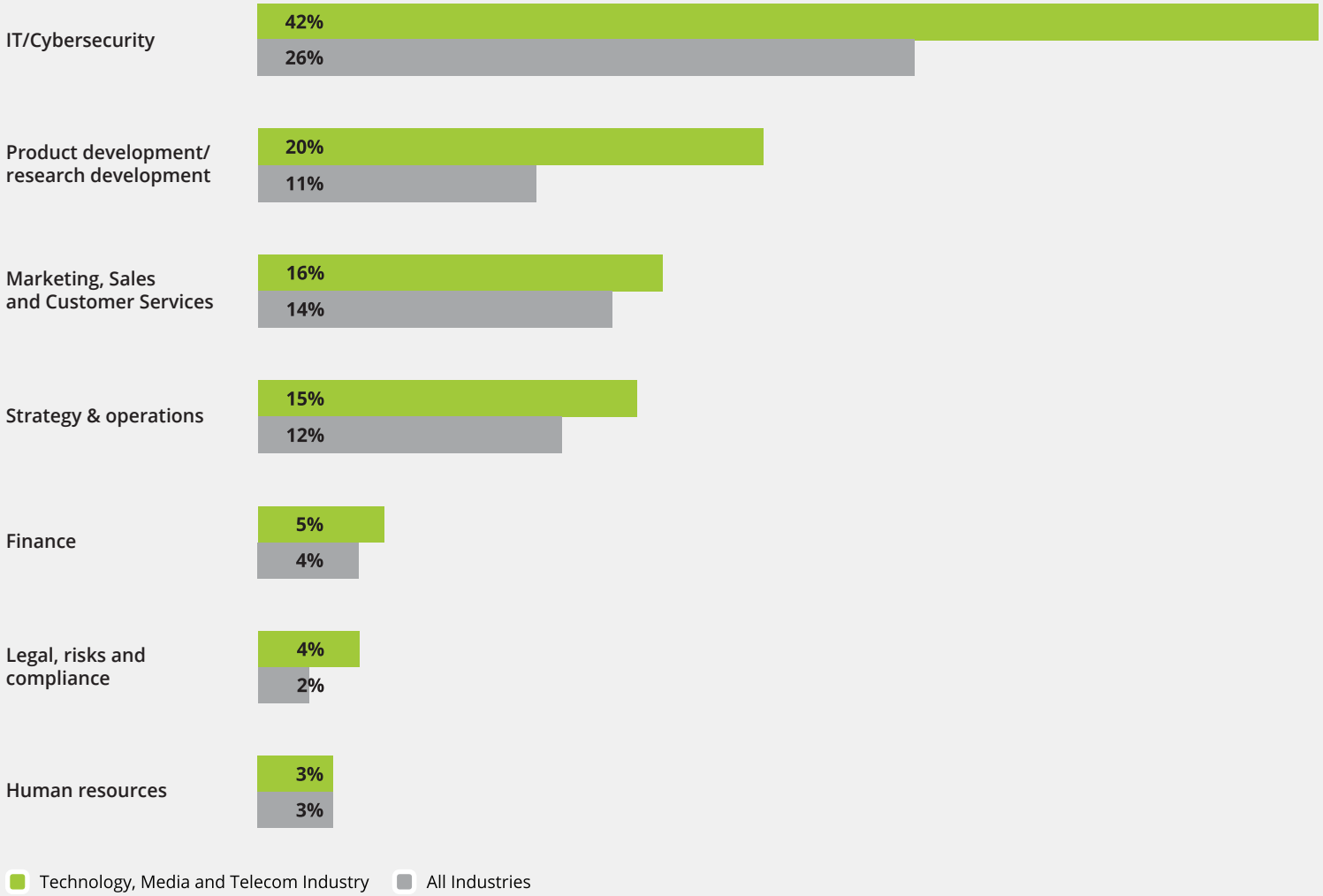

Figure 1 *Q: What is your organization's current adoption level of generative AI across the following functions?*

The confidence within the TMT industry regarding generative AI is striking. A substantial 60% of organizations report a high or very high level of expertise in this area, well above the cross-industry average of 41% and the highest across all industries. Only 4% report low expertise, compared to the 11% cross-industry average. This confidence in knowledge comes with a sense of urgency, as 53% of respondents report experiencing significant pressure from external competitors and stakeholders to adopt generative AI tools. TMT firms lead all industries with regard to the urgency tied to both internal and external factors. Nearly half (47%) cite strong internal pressure from leadership and employees demanding innovation, a stark contrast to the cross-industry average of just 30%. Similarly, the 53% external pressure figure stands well above the 35% average across industries, underscoring how the TMT industry faces exceptional demands to accelerate AI adoption.

Such expertise correlates with a positive perception of generative AI. Organizations that are knowledgeable about these technologies see them as opportunities for innovation rather than challenges. In contrast, industries with less familiarity tend to exhibit hesitance, grappling with fears of falling behind in technology adoption.

Indeed, despite the ongoing discourse on the potential threats from generative AI, TMT respondents express limited concern. As many as 45%, the highest share among all industries, feel little or no threat from its widespread adoption, indicating confidence that they can leverage AI as a vehicle for innovation. This positive outlook enables organizations to engage with generative AI in ways that enhance productivity and efficiency, reinforcing an adaptive organizational culture steeped in opportunity.

Adoption levels vary across different functions within TMT. An impressive 42% of respondents in IT and cybersecurity affirm “At scale implementation,” compared to the cross-industry norm of 26%. Additionally, 20% report similar adoption levels in product development. However, adoption in finance, legal and human resources remains low, with only 5%, 4% and 3% indicating “At scale implementation” respectively, closely aligning with the average across industries of 4%.

While TMT firms lead all industries in giving employees access to generative AI — half of organizations report that more than 40% of their workforce has access, compared to a cross industry average of 31% —actual usage still lags behind its full potential. Only 22% of organizations report that their workforce uses generative AI regularly in their roles. This is more than double the rate across industries of 11% and the highest figure across industries, but it remains modest in absolute terms, highlighting the need to promote deeper integration and better utilization of AI tools in daily workflows to foster a culture of data-driven decision-making and collaboration.

TMT leads all industries with 34% of organizations preferring to develop AI tools internally. This substantial figure is nearly twice the cross-industry average of 18% who favor building over buying solutions. This aligns with their understanding of unique operational needs and a desire for tailor-made solutions. Additionally, 19% are engaging in extensive experimentation, pursuing over 50 generative AI experiments or proofs of concept, significantly surpassing the cross-industry average of 9%. This culture of experimentation encourages innovation and swift adaptation to successful AI implementations.

Workspace access and usage

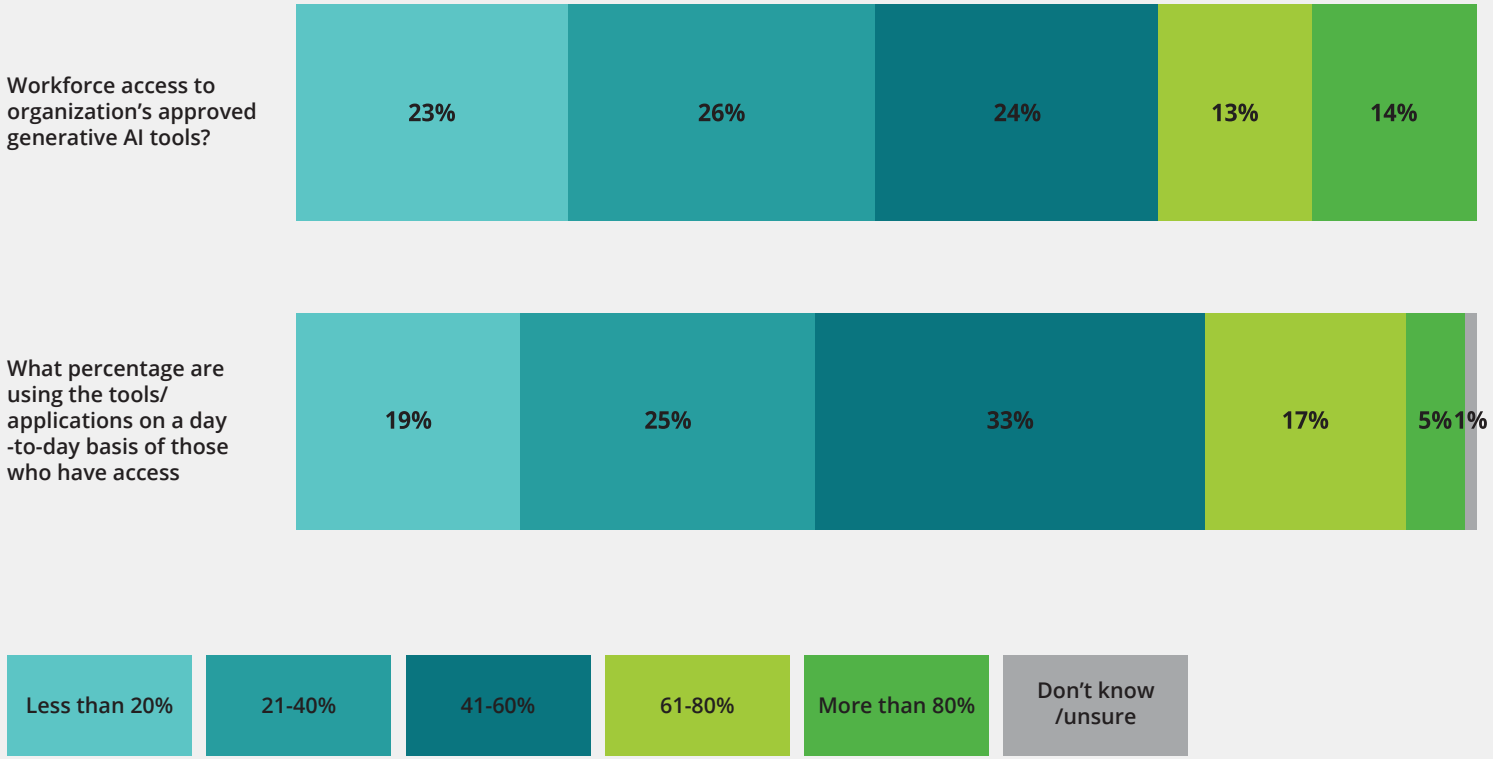

Figure 2 *Q: How many in your organization have access to organization's approved generative AI tools and what percentage of those are using the tools/applications on a day - day basis as part of their workflow?*

The integration of generative AI into operational processes is critical for success. TMT organizations report the highest level of integration across industries, with 40% of organizations reporting significant integration of generative AI initiatives into their workflows. The figure notably exceeds the cross-industry average of only 24% and reflects a strong strategic alignment between AI initiatives and business objectives, supported by a solid framework for AI investments.

In essence, the TMT industry's approach to adopting and integrating generative AI is defined by high confidence, strong urgency and a spirit of innovation. By cultivating expertise and fostering an environment that embraces experimentation, TMT organizations are uniquely positioned to leverage generative AI's potential.

For TMT organizations, focusing on developing expertise and maintaining a proactive approach centered around innovation will be vital for harnessing the advantages of generative AI. The landscape indicates a necessary balance between building internal capabilities and ensuring thorough integration into essential processes, thereby maximizing generative AI's potential to improve operational efficiency and promote overall growth.

Strategic Readiness and the Transformational Impact of Generative AI

Strategic Readiness and the Transformational Impact of Generative AI

The emergence of generative AI is transforming the Technology, Media and Telecom (TMT) industry. This chapter uncovers how TMT organizations are responding to this shift, highlighting their operational transformation plans and investment approaches based on our quarterly survey. Notably, 75% of TMT firms, the highest percentage among all industries, expect significant operational shifts within their own organizations in the next three years, surpassing the cross-industry average of 64%This optimism stems from a belief that AI is not merely a technological enhancement but a catalyst for change across the entire TMT industry.

In parallel, 68% of TMT respondents, again the top-ranking figure, foresee the broader TMT industry undergoing substantial transformation within the same period, compared to a 60% average across industries. This gap suggests that many organizations anticipate transforming ahead of the broader industry, signaling a desire to lead rather than follow change in their field. Organizations must integrate this optimistic perspective into their strategic frameworks to access new competitive advantages.

Level of preparedness

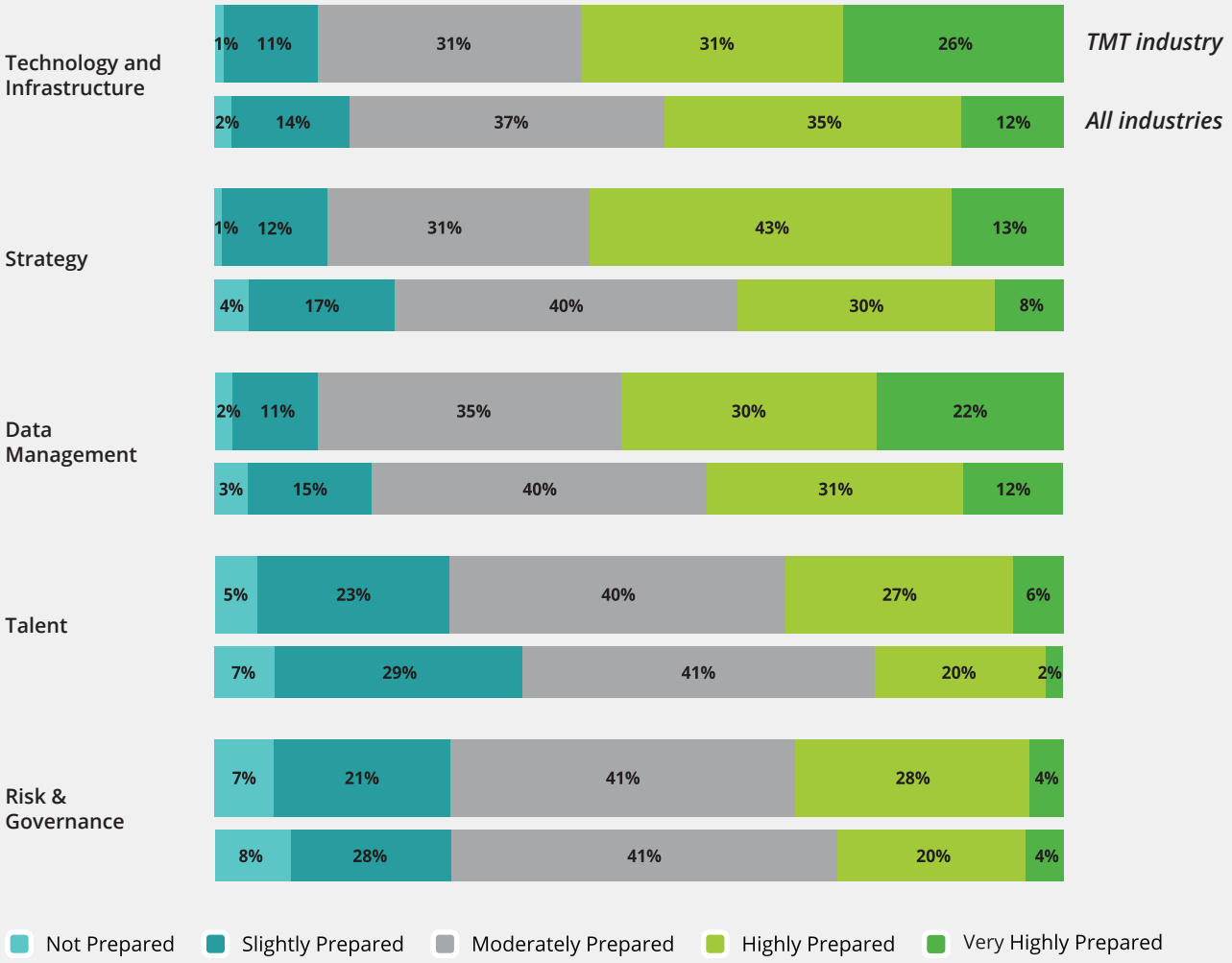

Figure 3

Q: Consider the following areas. For each, rate your organization's level of preparedness with respect to broadly adopting generative AI tools/applications.

When assessing organizational preparedness, TMT firms lead decisively across all five key areas. Among respondents who consider their organizations highly or very highly prepared, strategy readiness stands at 55%, representing a 16-point lead over the cross-industry average, while 57% feel confident in their technology infrastructure. Talent preparedness, a critical enabler for AI adoption, is rated highly by 32%—10 points above the cross-industry norm. Governance and risk management (31%) and data management (52%) also show marked strength, positioning TMT organizations well ahead of most other industries.

These results highlight an industry that is not only envisioning the future of AI-driven transformation but is also operationally ready to deliver on that vision. This comprehensive preparedness reflects deep investment and maturity, setting TMT apart as a frontrunner in the generative AI race.

TMT organizations are broadly in step with other industries in their expectations around generative AI, with a strong emphasis on operational and strategic gains. Efficiency and productivity improvements are the top anticipated benefits, cited by 56% of respondents, followed by innovation and business growth opportunities at 36%. Other anticipated benefits include improving existing products and services (35%) and increasing the speed and/or ease of developing new systems/software (26%). These four priorities all rank above the cross-industry average, while all others fall below it. This focus reflects the industry's dual emphasis on optimizing internal performance and accelerating the development of AI-enabled services.

On the barrier side, regulatory compliance (40%) and risk management (35%) dominate as primary concerns. While these align with overall trends, the data reveals a nuanced divergence in internal readiness. 28% of TMT leaders identify lack of governance as a barrier, notably higher than the 24% cross-industry average. This stands in contrast to just 17% citing the absence of an adoption strategy, which is lower than the 21% cross-industry benchmark. This suggests that while TMT firms may have a clear vision for their AI strategies, the structures to scale AI responsibly are not yet fully in place. To translate strategic clarity into operational impact, more structured governance will be critical.

Encouragingly, potential barriers generally seen as low-impact across industries—such as cultural resistance, technology selection, infrastructure limitations and lack of executive support—are perceived as significantly less challenging within TMT. This suggests an industry with strong foundational readiness, where leadership commitment and technical capability are already in place, enabling a sharper focus on scale and governance.

The TMT industry's strong preparedness across strategy, technology, talent, governance and data management underscores its leadership in generative AI adoption. While the outlook for transformation is promising, strengthening governance frameworks will be essential to unlocking AI's full potential. Built on this foundation, TMT organizations are well positioned to leverage generative AI not only to boost operational efficiency but also to drive innovation and reshape industry growth.

Barriers of adoption

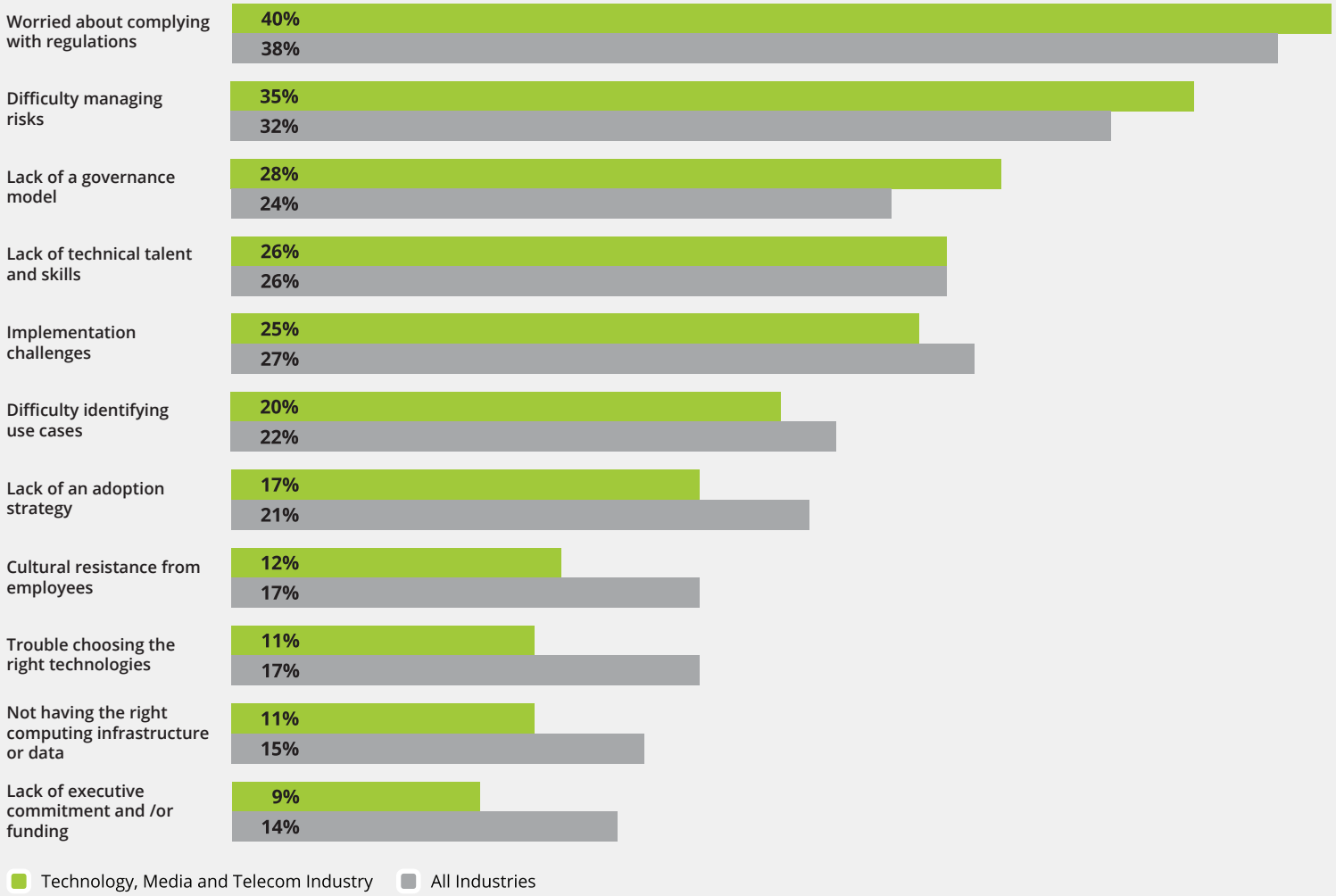

Figure 4 *Q: What, if anything, has most held your organization back in developing and deploying generative AI tools/ applications?*

Building Trust, Managing Risk, and Leading Innovation in Generative AI

Building Trust, Managing Risk, and Leading Innovation in Generative AI

In the dynamic world of artificial intelligence, confidence and control in the deployment of generative AI technologies are crucial for organizations aiming to innovate. Enterprises in the Technology, Media and Telecom (TMT) industry are actively navigating issues of trust, return on investment (ROI), workforce readiness and development strategies as they advance their generative AI initiatives.

A critical metric of interest is ROI. An impressive 44% of TMT respondents report that their ROI from generative AI initiatives is "somewhat" or "significantly above expectations," ranking first among all industries and far surpassing the cross-industry average of 31%. This strong perception of positive ROI reflects TMT organizations' confidence in leveraging generative AI.

Aniticipated time to resolve issues

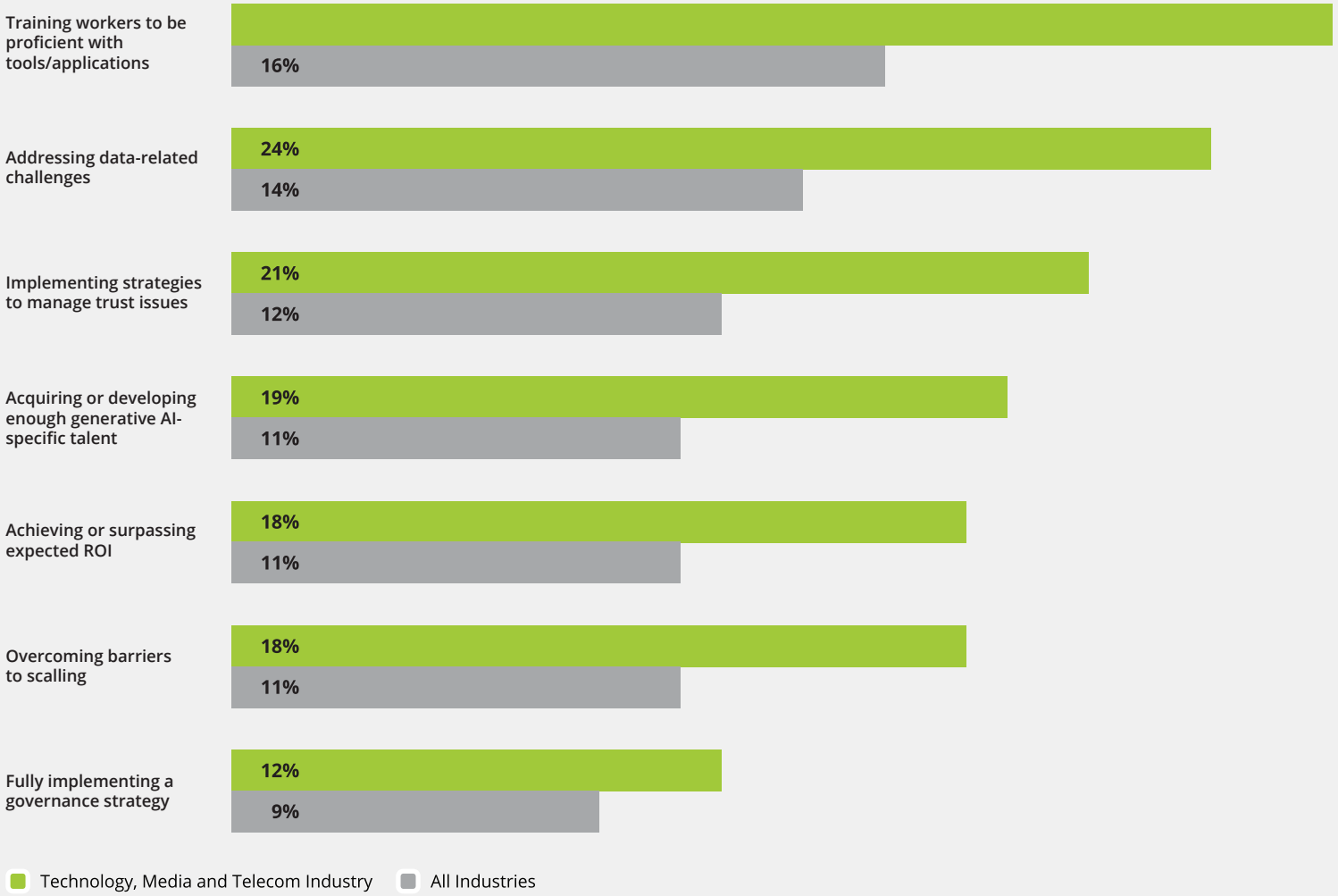

Figure 5 *Q: With respect to your organization's priority generative AI initiatives, when do you think the organization will adequately resolve challenges around the following areas?*

That optimism is likely rooted in the TMT industry's long-standing affinity for digital innovation, which continues to support rapid integration of generative AI tools. As organizations refine their strategies and build on early experiences, they enhance their financial returns.

Trust in generative AI technologies also stands out. Around 50% of TMT respondents, ranking first across all industries, express "high" or "very high trust" in this technology. This figure is significantly above the average across industries of 33%, which in turn fosters broader adoption and signals readiness to scale.

In parallel with building trust, TMT organizations are investing significantly in workforce readiness, exceeding the cross-industry average by 10 percentage points in two key areas. Specifically, 53% report a "high" or "very high" level of effort in educating employees about generative AI and 50% are actively reskilling their workforce to adapt to technological changes. These educational efforts not only build internal capability but also support higher ROI, as employees become better equipped to apply AI tools in practice, maintaining a competitive edge.

This focus on preparedness also encompasses the ability to overcome implementation challenges. TMT organizations are particularly optimistic about their speed to resolution. Approximately 27% of TMT respondents believe workforce training issues can be addressed within six months and 24% express similar confidence about resolving data-related challenges. Both of these figures are significantly higher than the cross-industry averages of 16% and 14%, respectively. In fact, TMT scores significantly above average for the speedy resolution of all anticipated challenges, underscoring an agile mindset and a workforce uniquely capable of adapting to new demands.

Despite the positive metrics surrounding ROI, trust and workforce, TMT organizations recognize substantial challenges in adopting generative AI, with levels highly similar to those across all industries. The top concerns include "mistakes/errors leading to real-world consequences" (35%) and "not achieving expected value" (33%). Furthermore, 28% of respondents express concerns about "A general loss of trust due to bias, hallucinations and inaccuracies". While trust levels are currently high, these concerns highlight the critical need for robust quality assurance and governance to sustain stakeholder confidence.

In response, many firms are taking decisive action regarding Gen-AI-driven software development. A leading 62% of TMT respondents, ranking first and well above the cross-industry average, have implemented enhanced testing and validation protocols to ensure reliability and effectiveness. Similarly, 52% and 53%, both top-ranked, are investing in model lifecycle management and training, respectively, ensuring governance and compliance are maintained. Standardized development practices are also gaining traction, with 47% adoption, again the highest level across industries. All four measures exceed averages across industries by over 10 percentage points, reflecting TMT's proactive approach to quality and control.

TMT leaders are also demonstrating strategic patience. Around 30%, the highest figure among industries, are willing to continue investing in generative AI for more than 24 months before pulling back on underperforming initiatives, compared to a cross-industry average of 19%. This long-term view reflects confidence in generative AI's transformative potential and a commitment to value realization over time.

Innovation continues to be a hallmark of the industry. Roughly 42% of respondents, leading all other industries, report actively exploring autonomous agents, compared to a cross-industry average of just 26%. Supporting this trend, TMT organizations ranked first in interest for both agentic AI (58%) and multi-agent systems (53%), well above cross-industry averages of 52% and 45%, respectively, signaling a push toward autonomy and a readiness to rethink operational models and adopt next-generation capabilities.

Backed by high ROI, deep trust and focused investment in people and processes, TMT organizations are building a strong foundation for scalable, responsible generative AI. As they continue to push boundaries and address risk with discipline, they are poised to exemplify successful adoption and lead the next wave of AI-enabled innovation.

AI technology development

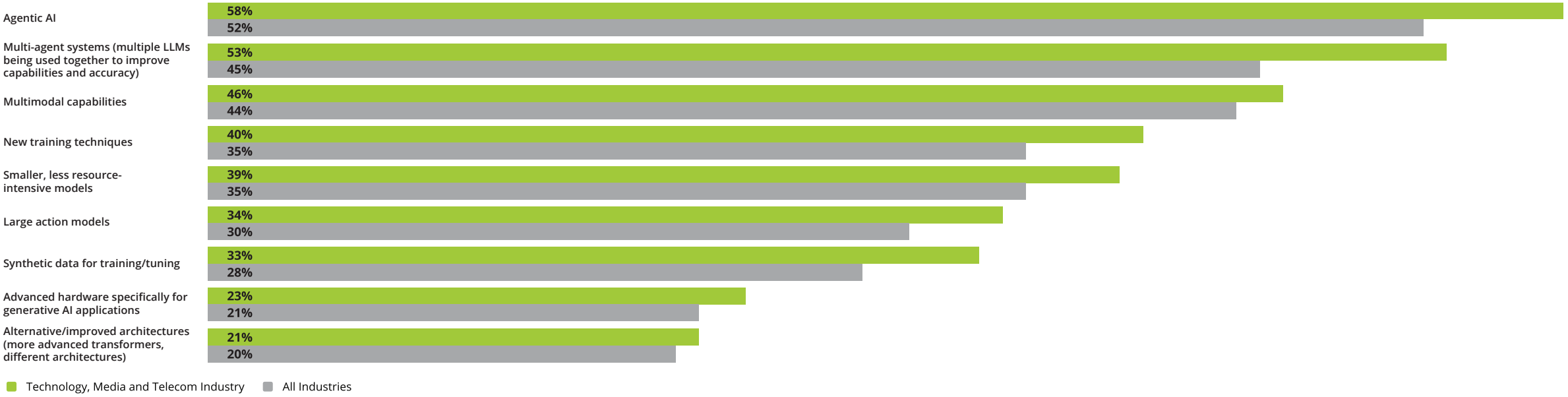

Figure 6 *Q: What generative AI technology developments is your organization most interested in?*

Looking Ahead: Charting a Vision for Generative AI Integration

As technology, media and telecommunications (TMT) organizations forge ahead on their journey to adopt and integrate generative AI, they face a landscape filled with both remarkable opportunities and significant challenges that necessitate astute strategic foresight. A noteworthy 60% of firms have assessed their capabilities in this domain highly; however, the emphasis must now shift to transforming this knowledge into practical, actionable results. This momentum is driven not only by internal ambition but also by significant pressure from both internal stakeholders and external competitors to accelerate adoption. Key to this transformation is enhancing training and engagement strategies to narrow the gap between AI tool accessibility and actual utilization. Elevating the utilization of generative AI beyond the current rate of 22% is essential for unlocking its potential to drive operational efficiency.

As TMT organizations navigate the complexities of change, the urgent call for widespread generative AI adoption underscores the importance of a proactive and adaptable mindset. Leaders must prioritize investing in continuous learning frameworks and robust governance structures that not only promote experimentation but also ensure alignment with overarching business objectives. This strategic alignment addresses perceived risks while empowering firms to harness generative AI as a catalyst for competitive advantage.

Furthermore, to fully exploit the potential of generative AI, companies must implement comprehensive risk management and compliance frameworks. Concerns regarding regulatory compliance and data protection persist; therefore, embedding rigorous data governance measures into AI initiatives is vital for fostering trust among stakeholders. While TMT firms show strong strategy readiness, strengthening governance frameworks remains a critical priority to ensure responsible scaling. Encouragingly, this foundation is bolstered by the TMT industry's strong reported returns on investment and high levels of trust in generative AI technologies—both of which reinforce confidence and justify continued innovation. By reassessing funding priorities and championing projects with measurable impact, organizations can enhance their readiness for digital transformation and spur future innovations.

Workforce readiness remains a pivotal focus in this transition, as a substantial proportion of organizations brace for workforce reductions associated with advanced technologies. Prioritizing reskilling initiatives alongside employee engagement efforts is critical for cultivating a culture of adaptability and continuing education. This approach empowers employees to thrive in an AI-enhanced landscape, fortifying organizations' capacity to adapt to ongoing shifts.

The anticipated challenges surrounding training, data management and generative AI readiness present both risks and opportunities for TMT firms. Optimism surrounding manageable resolution timelines should inspire firms to develop robust strategies addressing these obstacles. Investing in advanced training programs and comprehensive governance frameworks will ensure ethical standards are upheld while optimizing performance throughout the integration process. At the same time, many TMT firms are opting to develop AI solutions internally, a strategic choice that reflects their desire for tailored innovation and greater control over implementation—particularly in areas where standard solutions may fall short.

Moreover, nurturing cross-functional collaboration will be key in crafting a unified response to generative AI challenges. By leveraging diverse expertise, organizations can adopt an ecosystem mindset that fosters innovative solutions and accelerates adaptation to market demands. The long-term vision exhibited by TMT leaders in funding decisions highlights a commitment to transformative possibilities, including the integration of advanced autonomous agents into their operations. This ambition extends further to include rising interest in multi-agent systems and agentic AI, signaling an industry that is not only evolving but actively shaping the next wave of intelligent systems.

As TMT leaders plot their course through the intricate landscape of generative AI, nurturing a culture of trust, promoting workforce adaptability and encouraging interdisciplinary collaboration will be essential. By laying these strategic foundations, organizations not only position themselves to thrive in the present landscape but also secure a leading edge in the future evolution of generative AI advancements, ultimately laying the groundwork for sustainable growth.

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The Deloitte AI Institute™ helps organizations connect all the different dimensions of the robust, highly dynamic and rapidly evolving AI ecosystem. The AI Institute leads conversations on applied AI innovation across industries, using cutting-edge insights to promote human-machine collaboration in the Age of With™.

The Deloitte AI Institute aims to promote dialogue about and development of artificial intelligence, stimulate innovation, and examine challenges to AI implementation and ways to address them. The AI Institute collaborates with an ecosystem composed of academic research groups, startups, entrepreneurs, innovators, mature AI product leaders and AI visionaries to explore key areas of artificial intelligence including risks, policies, ethics, future of work and talent, and applied AI use cases. Combined with Deloitte's deep knowledge and experience in artificial intelligence applications, the institute helps make sense of this complex ecosystem and, as a result, delivers impactful perspectives to help organizations succeed by making informed AI decisions.

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Methodology

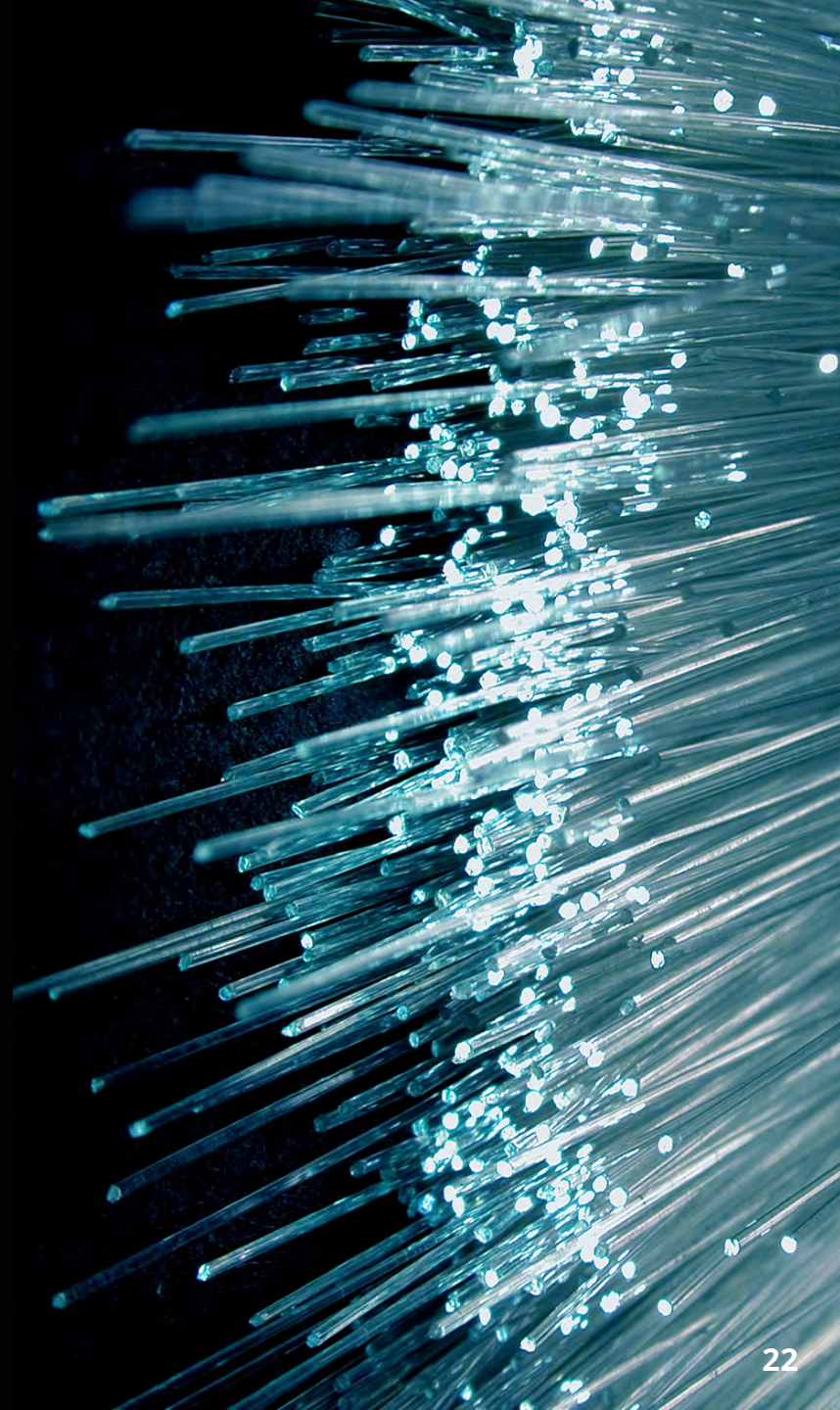
To obtain a global view of how Generative AI is being adopted by organizations on the leading edge of AI, Deloitte surveyed 2,773 leaders between July and September 2024.

Respondents were senior leaders in their organizations and included board and C-suite members, and those at the president, vice president and director levels. The survey sample was split equally between IT and line of business leaders. Fourteen countries were represented: Australia (100 respondents), Brazil (115 respondents), Canada (175 respondents), France (130 respondents), Germany (150 respondents), India (200 respondents), Italy (75 respondents), Japan (100 respondents), Mexico (100 respondents), the Netherlands (50 respondents), Singapore (75 respondents), Spain (100 respondents), the United Kingdom (200 respondents), and the United States (1,203 respondents).

All participating organizations have one or more working implementations of AI being used daily. Plus, they have pilots in place to explore Generative AI or have one or more working implementations of Generative AI being used daily. Respondents were required to meet one of the following criteria with respect to their organization's AI and data science strategy, investments, implementation approach and value measurement: influence decision-making, are part of a team that makes decisions, are the final decision-maker, or manage or oversee AI technology implementations.

All statistics noted in this report and its graphics are derived from Deloitte's fourth quarterly survey, conducted July – September 2024; The State of Generative AI in the Enterprise: Now decides next, a report series. N (Total leader survey responses) = 2,773

The survey data was supplemented with case studies and qualitative findings derived from 15 interviews with executives and AI and data science leaders at large organizations across a range of industries.



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