

THE STATE OF ENTERPRISE AI IN APJ

From Experimentation to Impact

Enterprise AI has crossed the experimentation line.

45.8%

APJ at Standardization
or Transformation

17.9%

APJ at Transformation

9.6%

North America
at Transformation

Awareness

>

Experimentation

>

Optimization

>

Standardization

>

Transformation

 MARKET PULSE

APJ IS NOT ONE AI MARKET

China

Parallel AI ecosystem

India

Speed + workforce

Japan

Adoption > impact

Australia

Productivity > transformation

Singapore

Production + agents

South Korea

Very high adoption

**Same technology revolution.
Different paths through it.**

 THE CONCEPTUAL SHIFT

AI MATURITY IS NOW MULTIDIMENSIONAL

ADOPTION

Are people using it?

PRODUCTION

Is it doing real work?

SCALE

Is it enterprise-wide?

**These do not
move at the
same speed.**

AUTONOMY

Can it act?

GOVERNANCE

Can we control it?

IMPACT

Does it create measurable value?

MARKET PULSE

FROM GENERATION TO ACTION

Multi-agent orchestration

21.4%

APJ

11.5%

North America

APJ • SIX MONTHS

13.8% → 21.4%

in just six months

Generate

>

Recommend

>

Decide

>

Act

>

Coordinate

 APJ'S AI STACK IS DIVERGING

ONE AI MARKET? NOT ANYMORE.

30.7%

DeepSeek in
production

vs. 16.8% North America

22.9%

Edge AI deployment

vs. 13.5% North America

37%

AI compute purchased
as CapEx hardware

25.5%

Domain / Sovereign
models

Models

>

Silicon

>

Cloud / Private

>

Edge

>

Sovereignty

THE BUSINESS TEST

DEPLOYMENT IS WINNING. IMPACT HASN'T CAUGHT UP.

80.4%

expect AI budgets
to increase

54.7%

already spending
above budget

AI PLATFORMS DECISION MAKER

More AI $\neq$ More Impact

~15%

report sustained
ROI at scale

APAC CIO PANEL

 THE NEXT PHASE OF ENTERPRISE AI

IMPACT

Did we get faster?

Did we get better?

Did we lower cost?

Did we create revenue?

Did we create something new?

Can we do it safely at scale?

 **Adoption got us here.**

Impact determines what comes next.