



How IT & GCC Enterprises in Telangana are advancing Global AI Edge

PwC-HYSEA Survey of IT & ITeS and GCCs



March 2026

Contents

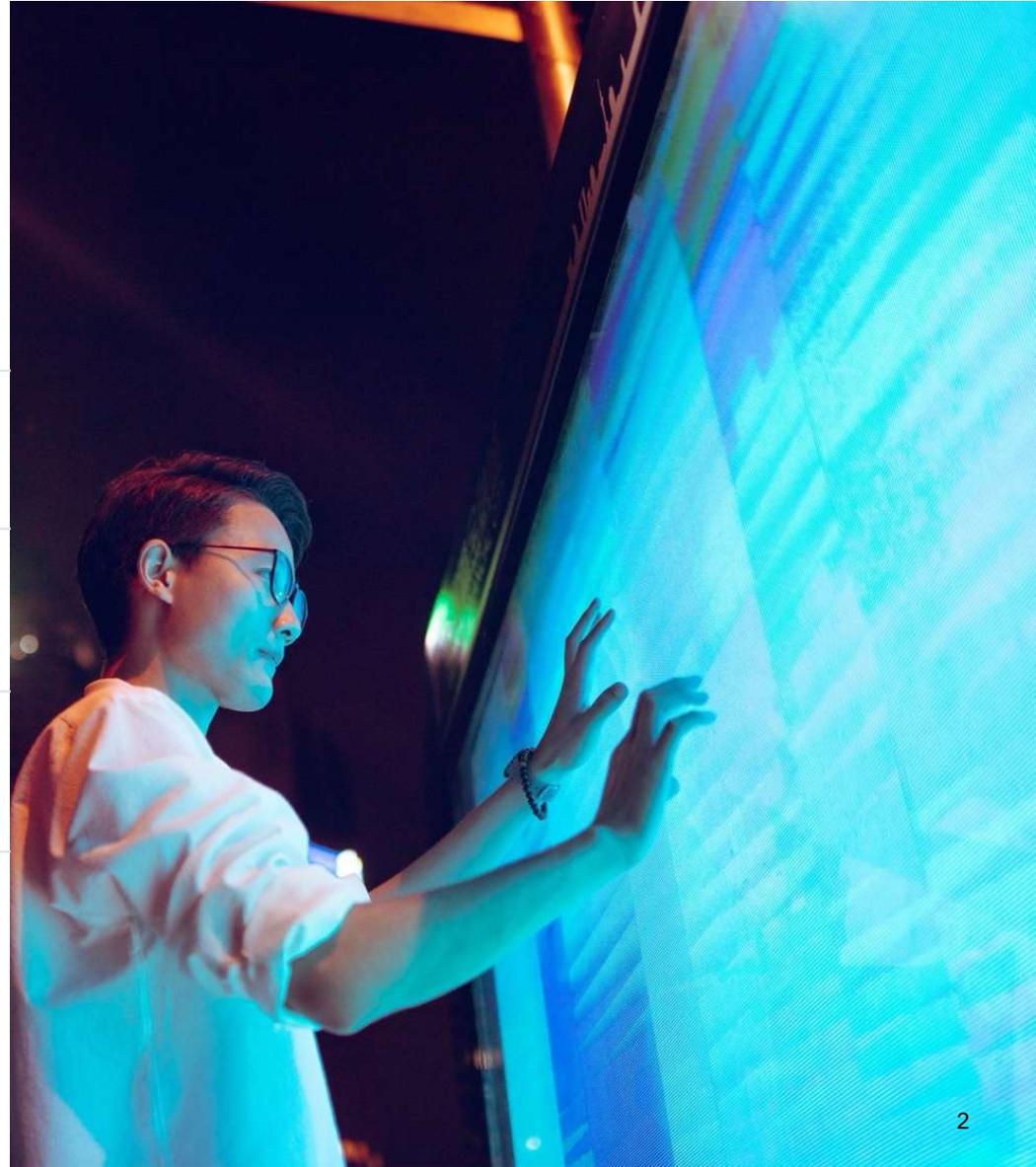
01 PwC Global CEO Survey – India Perspective

02 3A2I Framework for Understanding AI Maturity and Adoption

03 Financial Impact of AI Initiatives

04 AI Talent Pool & Governance

05 Key Takeaways for Leaders

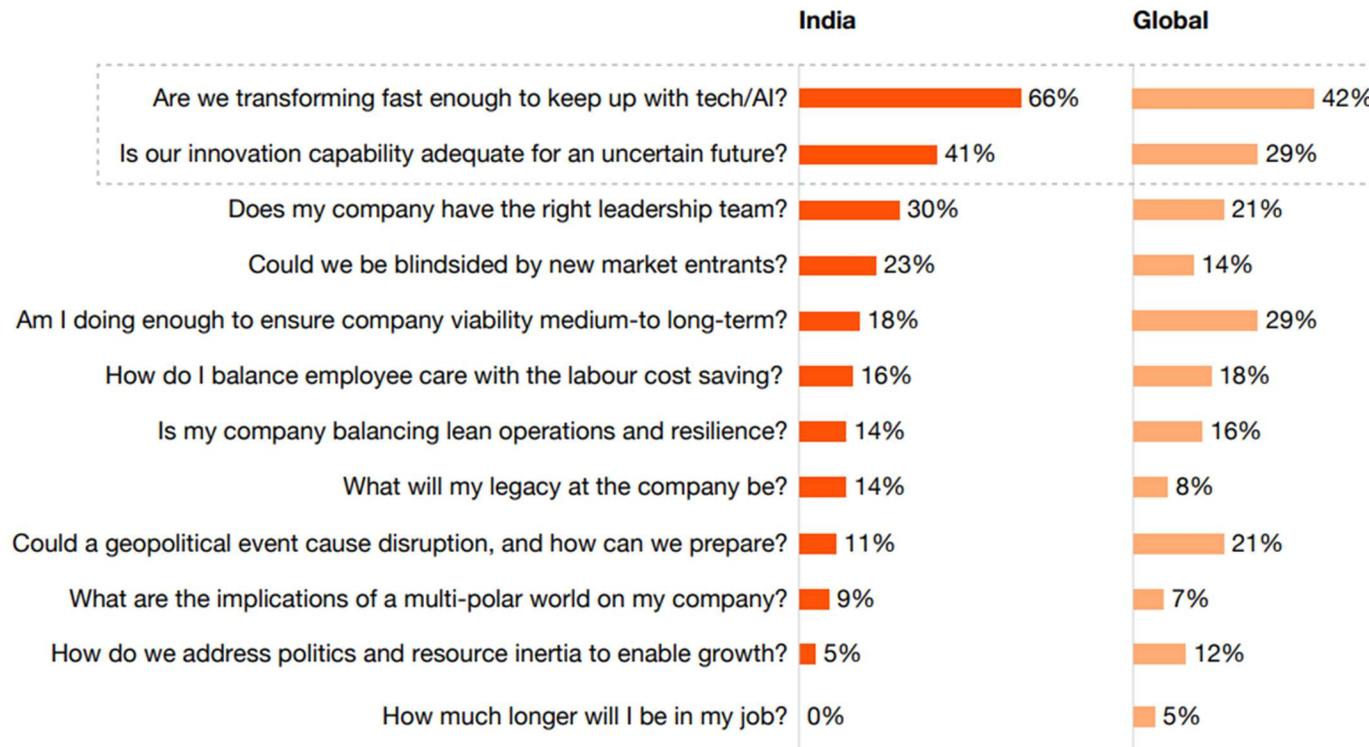


01

PwC Global CEO Survey – India Perspective

Are we transforming fast enough to keep up with tech/AI?

Indian CEOs feel greater urgency on AI than global peers.



Note: Among India respondents, 16% selected 'Other' and 5% selected 'Prefer not to say'. Among global respondents, 5% selected 'Other' and 4% selected 'Prefer not to say'.

- **India:** 66% of CEOs picked this as their top concern
- **Global:** 42% selected the same.



Source: <https://www.pwc.in/publications/ceo-survey/ceo-survey-2026.html>

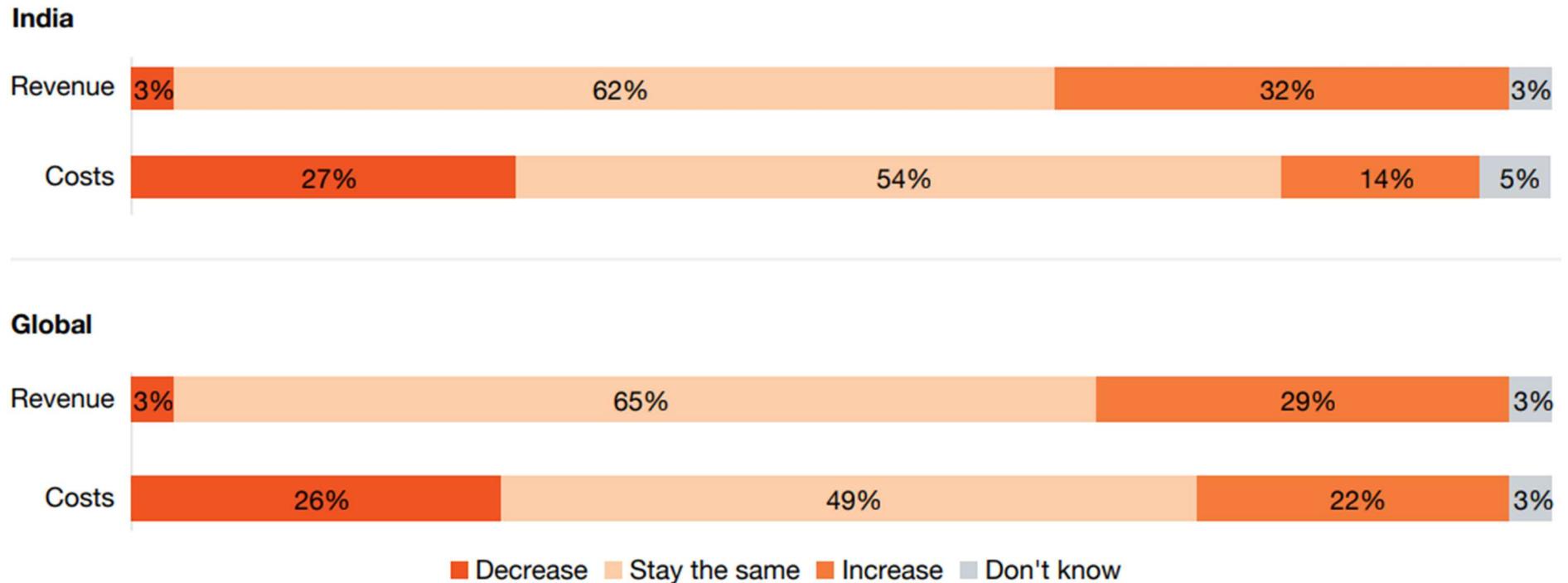
Are we transforming fast enough to keep up with tech/AI?

Our Findings

- Indian CEOs show a significantly higher urgency on keeping pace with tech/AI (66%) compared to global CEOs (42%), making it their top concern.
- Innovation capability is a major worry for Indian leaders (41%), indicating pressure to strengthen future-ready R&D and digital experimentation.
- Concerns around leadership depth are stronger in India (30% vs 21%), highlighting the need for teams that can drive AI-led transformation.
- Fear of being disrupted by new market entrants is notably higher in India (23%), signaling a fast-moving competitive landscape.
- Global CEOs worry more about geopolitical and macro disruptions (21%) than Indian CEOs (11%), showing different regional risk priorities.

Notes

How AI Is Shaping Business Performance: The Impact on Revenue and Costs



Source: <https://www.pwc.in/publications/ceo-survey/ceo-survey-2026.html>

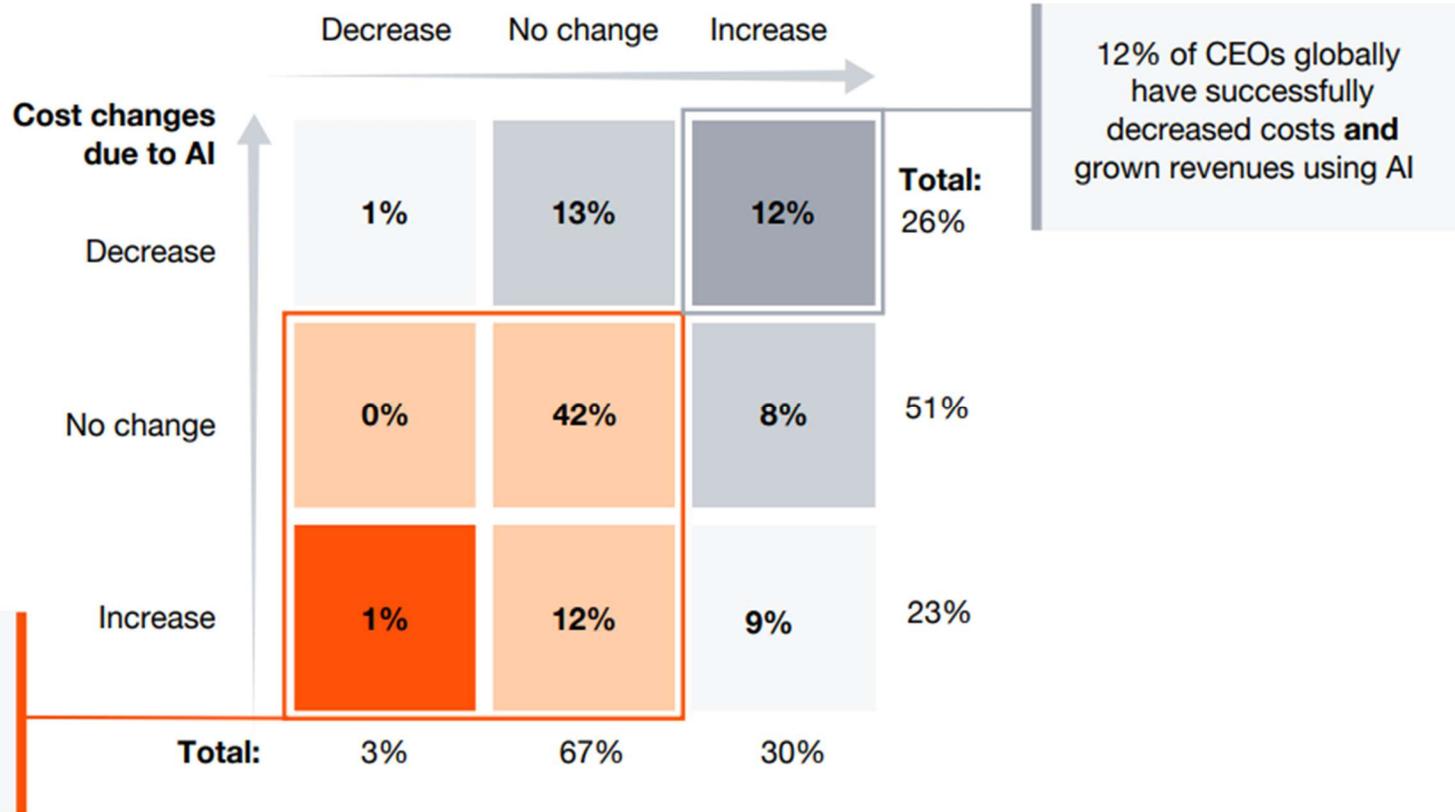
How AI Is Shaping Business Performance: The Impact on Revenue and Costs

Our Findings

- 32% of Indian CEOs report AI-driven revenue increase vs 29% globally while only 3% see revenue decline in both groups.
- 27% in India report cost decreases and 14% report cost increases, vs global 26% decreases and 22% increases.
- Revenues are unchanged for 62% (India) and 65% (global) and costs are unchanged for 54% (India) and 49% (global), signaling an early-stage scaling.
- Among Indian firms who are using AI at least moderately are experiencing 32% increase in revenue and 27% costs reduction.

Notes

Most companies globally are yet to realise higher revenues or lower costs from AI, even as a minority achieve both



Source: <https://www.pwc.in/publications/ceo-survey/ceo-survey-2026.html>

Most companies globally are yet to realise higher revenues or lower costs from AI, even as a minority achieve both

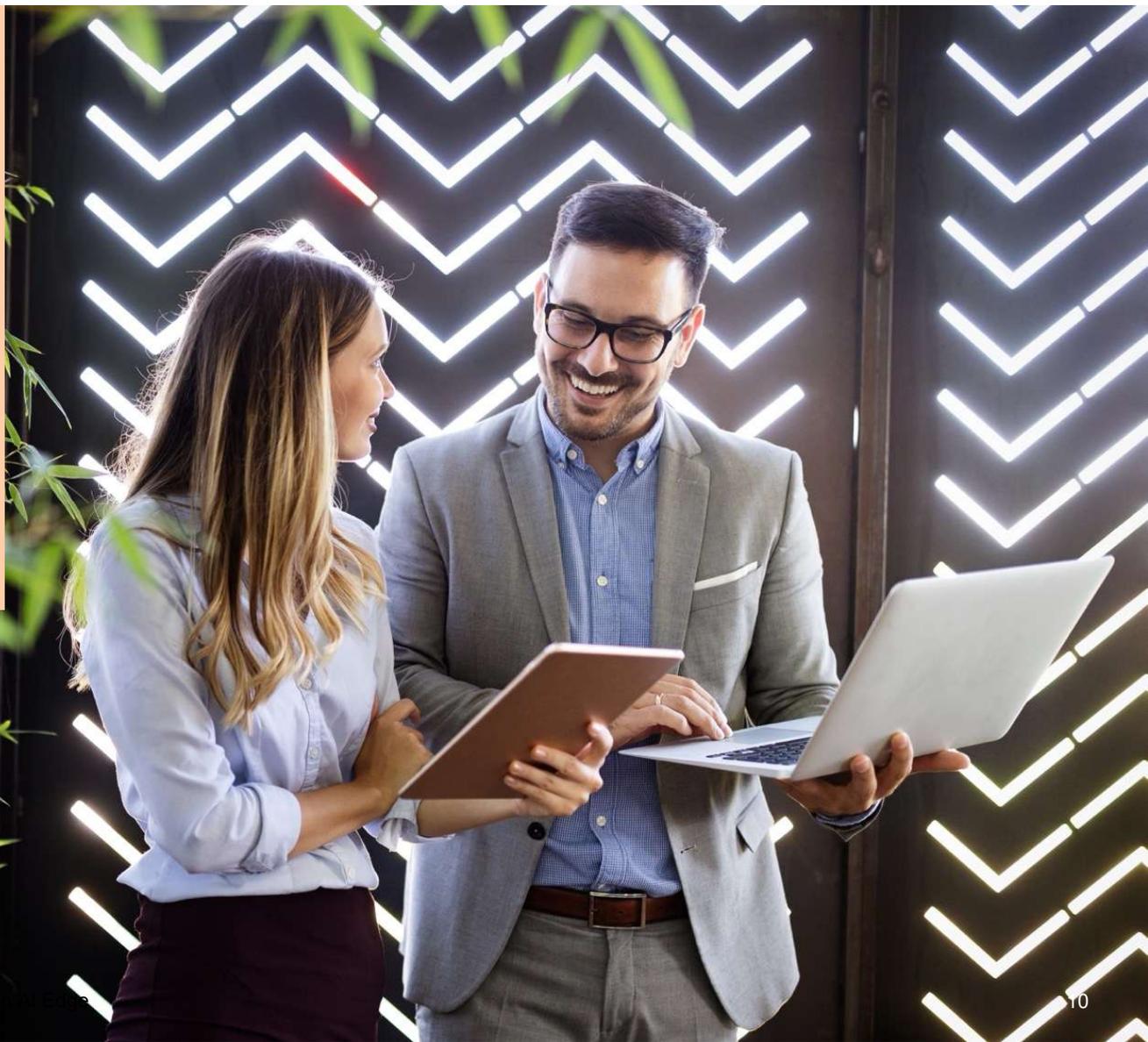
Our Findings

- Over half of companies still haven't gained anything from AI, with 56% seeing no increase in revenue and no drop in costs.
- A small but important group is benefiting fully, as 12% have managed to increase revenues and reduce costs using AI.
- When it comes to revenue, 30% of companies have seen an increase from AI, while 67% report no change and 3% have seen a decline.
- On the cost side, 26% report lower costs due to AI, 51% see no change, and 23% say their costs have actually gone up.
- Many companies see only one side improving: 13% have lower costs with revenue unchanged, 8% have higher revenue with costs unchanged, and the largest group remains those with no change on either side at 42%.

Notes

02

3A2I Framework for Understanding AI Maturity and Adoption



3A2I—A systems approach to diffuse AI within organisations to build sustained value with the same

A Access ▶ Equitable data, skills, and infrastructure for all.

A Acceptance ▶ Building trust, transparency, and ethical adoption.

A Assimilation ▶ Piloting and integrating AI solutions at scale

I Implementation ▶ Real-world deployment, learning, and adaptation.

I Institutionalisation ▶ Embedding AI sustainably into policies systems and culture.



Source: <https://www.pwc.in/ai-edge-for-viksit-bharat.html>

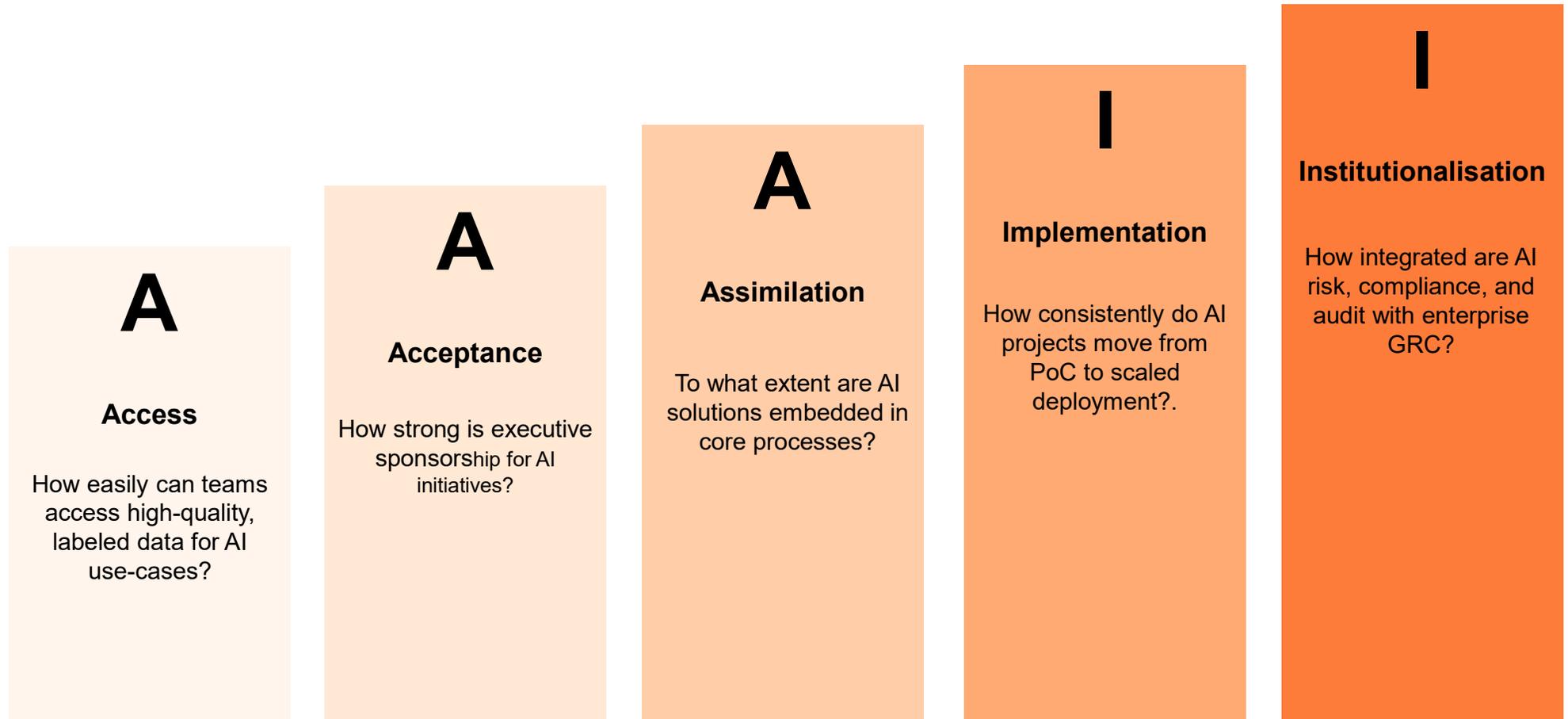
3A2I—A systems approach to diffuse AI within organisations to build sustained value with the same

Our Findings

- Access is about giving everyone the data, skills, and tools they need to start using AI.
- Acceptance focuses on building trust and helping people feel comfortable using AI in a fair and transparent way.
- Assimilation means bringing AI into everyday work by piloting solutions and scaling what works.
- Implementation is the practical stage where AI solutions are deployed, tested, and improved in real situations.
- Institutionalisation ensures AI becomes part of long-term policies, governance, and culture so its benefits last.

Notes

Application of 3A2I framework on AI Maturity Assessment



Leveraging the 3A2I framework, the PwC-HYSEA conducted the Survey to understand how IT and GCC Enterprises from Telangana are building Global AI Edge

As part of our survey, **46 companies participated**, responding to **51 questions** which assessed depth and breadth of AI adoption

What the Survey Uncovered

Using PwC's AI Edge Framework, we assessed the maturity of the participating companies across five measurable outcomes:

Operational Excellence



Sustainability



Good Governance



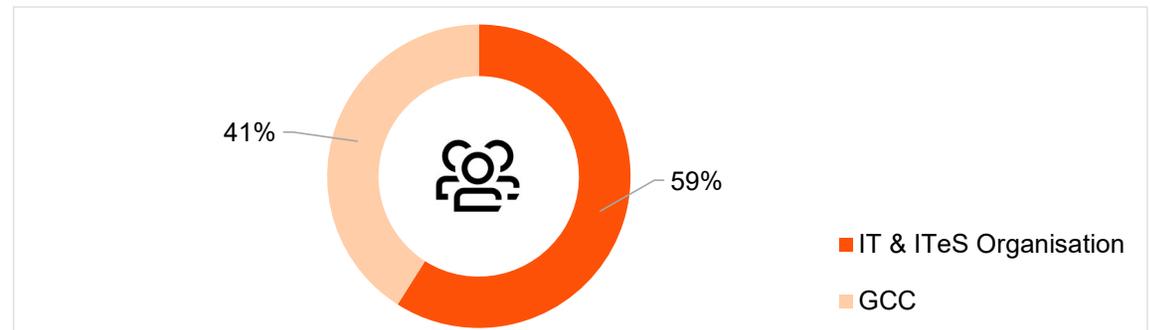
Resilience



Financial Discipline



Who Participated



| | | | |
|--------------------------|-----------|----------------------------|--------------------|
| CEO | President | MD | Executive Director |
| CFO | COO | CMO | Head of GCC (IN) |
| Chief Strategy Officer | | Chief Supply Chain Officer | |
| Chief Digital Officer | | CIO | Chief AI Officer |
| Chief Innovation Officer | | Head of AI & Analytics | |

Leveraging the 3A2I framework, the PwC-HYSEA conducted the Survey to understand how IT and GCC Enterprises from Telangana are building Global AI Edge

Our Findings

- The survey included 46 companies and used 51 questions to understand how mature they are in adopting AI.
- Participants were from IT & ITeS companies (59%), followed by GCCs (41%).
- Senior leaders took part in the survey, covering roles from the CEO level to functional heads like CIO, CDO, Chief AI Officer & Chief Strategy Officer.
- The survey assessed AI maturity across five areas: operational excellence, sustainability, good governance, resilience, and financial discipline.
- The assessment used the 3A2I framework to understand how organisations in Telangana are building a global AI advantage.

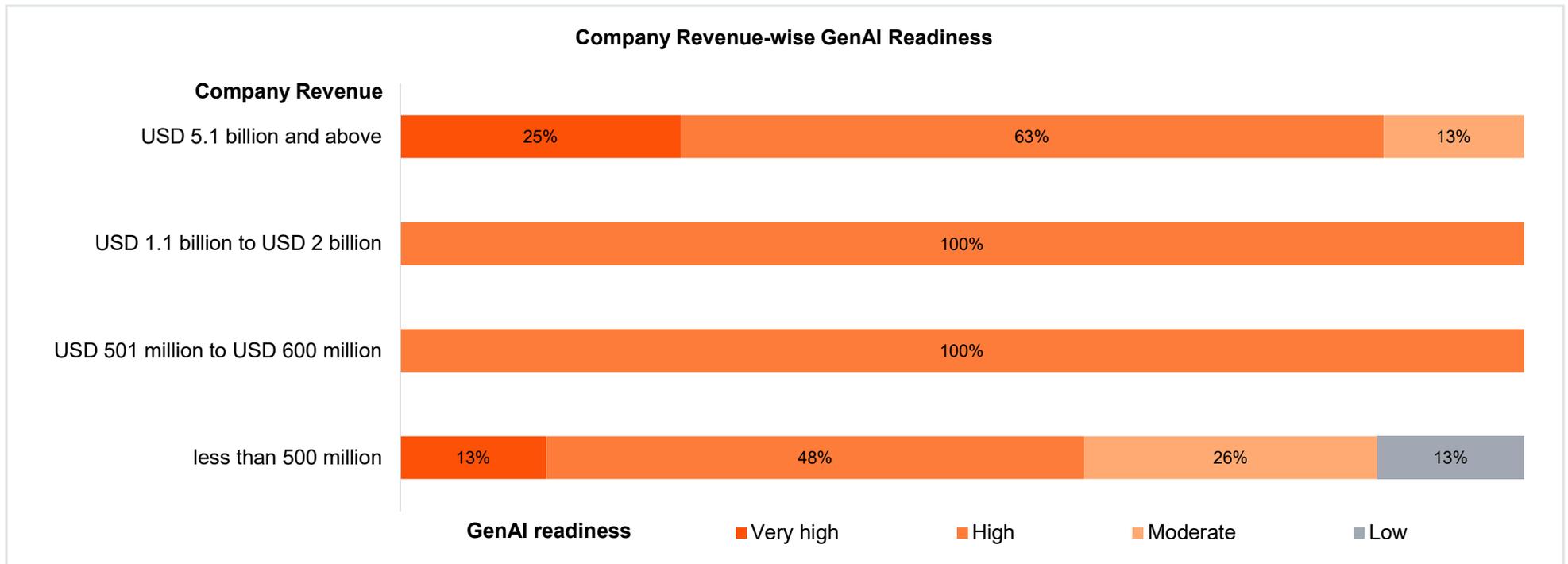
Notes

What leaders have to say regarding AI readiness and adoption in their organisations?



GenAI follows non-linearity relation in terms of scalability

Q. How would you rate your organization's current maturity in GenAI readiness?



*Sample Size: 46 respondents | Survey: How IT and GCC Enterprises are helping Telangana build an AI Edge

GenAI follows non-linearity relation in terms of scalability

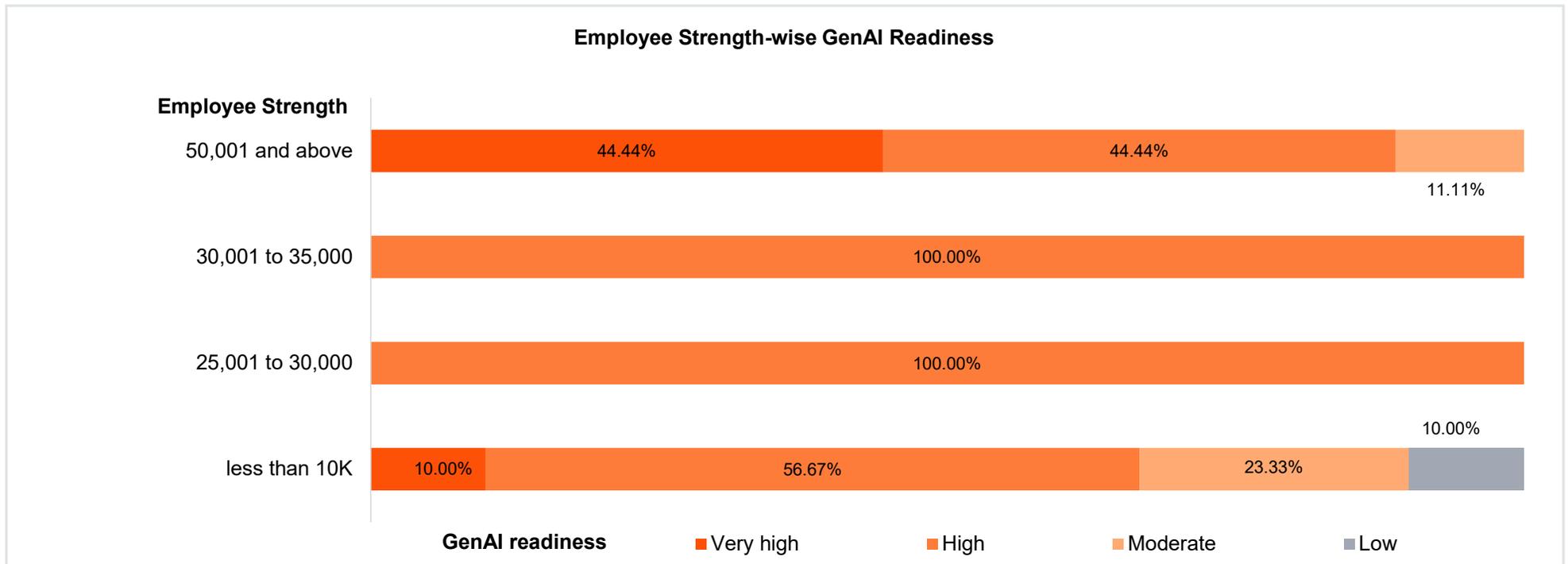
Our Findings

- Larger companies (USD 5.1B and above) show stronger GenAI readiness, with most rating themselves in the high-readiness zone.
- Mid-sized companies (USD 1.1B–2B and USD 501M–600M) report uniformly high readiness, suggesting focused efforts but still early in scaling.
- Smaller companies (under USD 500M) show wide variation, with readiness spread across high, moderate, and low, indicating uneven adoption.
- The chart shows a non-linear pattern—readiness does not rise steadily with revenue; instead, different revenue bands progress at different speeds.
- Overall, readiness is strongest at the top and inconsistent at the bottom, highlighting the need for structured scaling support for smaller firms.

Notes

GenAI readiness strengthens as organizations expand in workforce

Q. How would you rate your organization's current readiness level in adopting GenAI?



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GenAI readiness strengthens as organizations expand in workforce

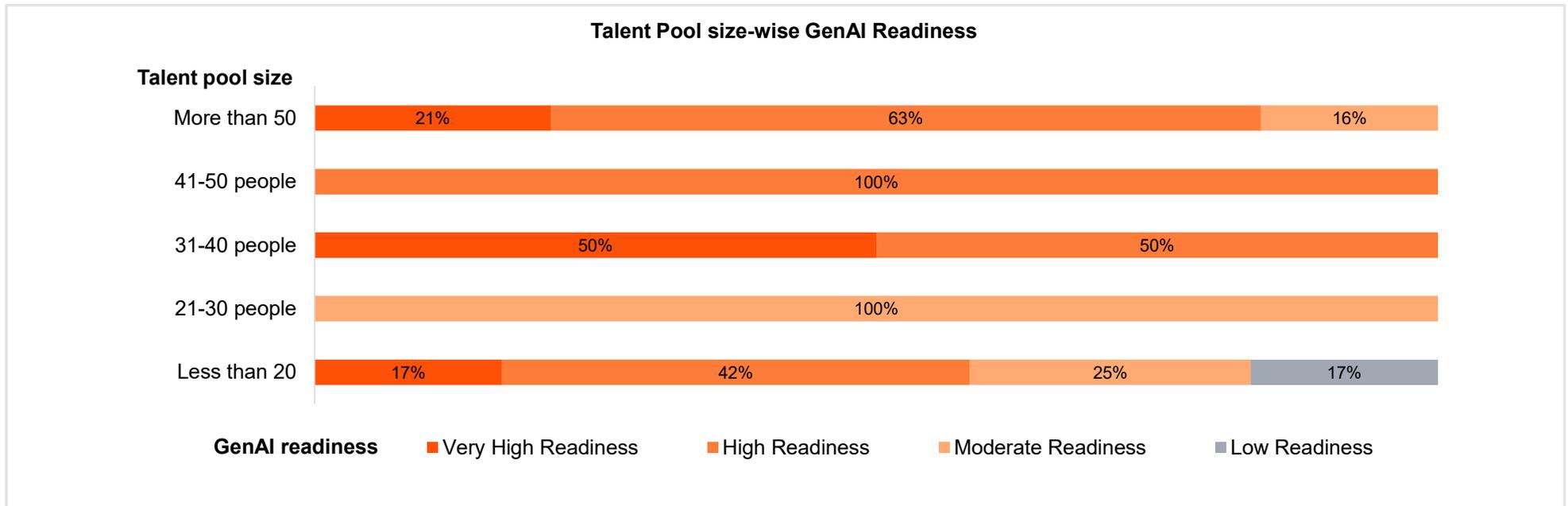
Our Findings

- Organisations with 50,001+ employees show stronger GenAI readiness overall, with most rating themselves in the high or very high category.
- Organisations in the 30,001–35,000 and 25,001–30,000 employee ranges report 100% high GenAI readiness, showing strong confidence in their adoption progress.
- Smaller organisations with less than 10,000 employees show a wide spread across readiness levels, from high to moderate to low, indicating inconsistent maturity.
- The pattern suggests that larger workforces are better positioned to build structured AI capabilities and scale them more consistently.
- Overall, GenAI readiness improves as employee size increases, showing a clear link between organisational scale and readiness to adopt AI effectively.

Notes

Value creation in GenAI is realized with not just any tech talent pool but a dedicated one

Q. What is the size of your organization's AI talent pool, and how would you rate your organization's overall readiness to adopt and scale GenAI?



*Sample Size: 46 respondents | Survey: How IT and GCC Enterprises are helping Telangana build an AI Edge

Value creation in GenAI is realized with not just any tech talent pool but a dedicated one

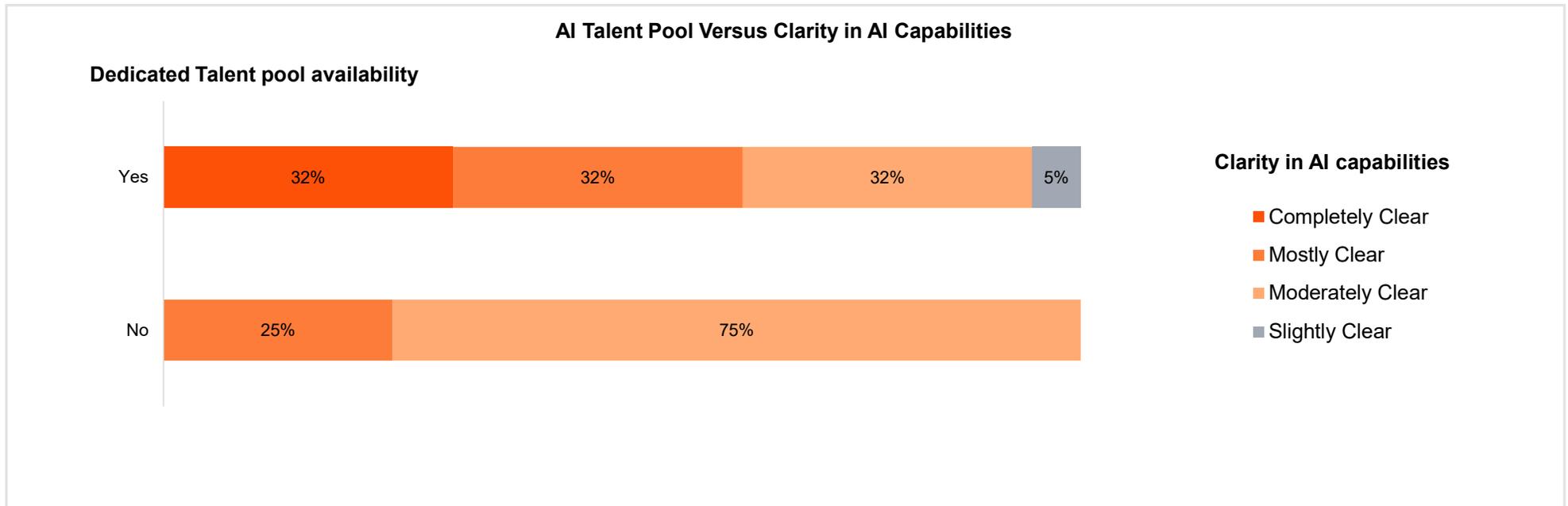
Our Findings

- Organisations with more than 50 AI specialists show strong readiness, with most rating themselves in the high or very high category.
- Organisations with 41–50 AI experts show 100% high readiness, indicating that a focused talent pool significantly boosts maturity.
- Organisations with 31–40 AI specialists show a split between very high and high readiness, showing steady capability but still building depth.
- Organisations with 21–30 AI experts also show 100% high readiness, highlighting that even mid-sized talent pools can drive strong adoption.
- Organisations with less than 20 AI specialists have the widest variation—from high to moderate to low readiness—showing that limited talent pools slow down AI maturity and consistency.

Notes

Focused AI talent emerges as a key enabler of capability clarity

Q. How clear is your organization about its differentiated AI capabilities, and how does the size of your AI talent pool influence this clarity?



*Sample Size: 46 respondents | Survey: How IT and GCC Enterprises are helping Telangana build an AI Edge

Focused AI talent emerges as a key enabler of capability clarity

Our Findings

- Organisations with a dedicated AI talent pool have much stronger clarity on their AI capabilities, with a balanced spread across completely clear, mostly clear, and moderately clear categories.
- Organisations without a dedicated AI talent pool show far less clarity, with 75% saying their understanding of AI capabilities is only moderately clear.
- Overall, the data shows that clarity in AI capabilities grows significantly when organisations invest in a dedicated AI team rather than relying on general tech resources.

Notes

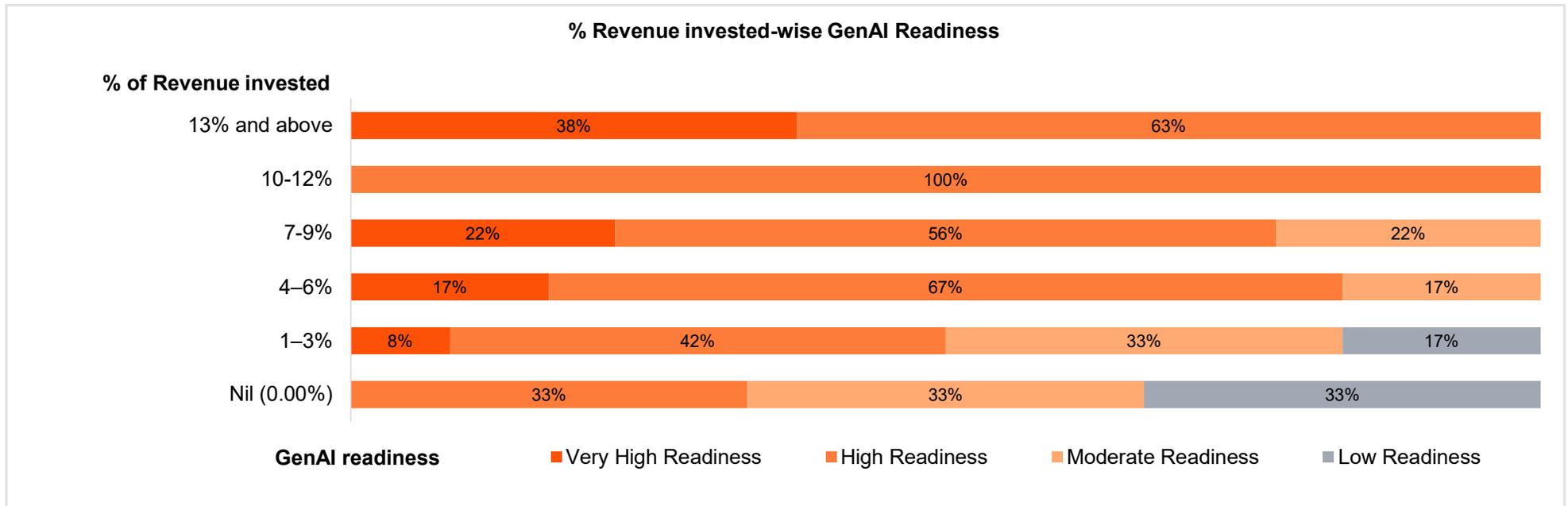
03

Financial Impact of AI Initiatives



Organisations investing in AI are experiencing higher level of readiness and higher than planned business outcomes

Q. How much of your organization’s annual revenue is currently invested in AI initiatives, and how prepared do you believe the organization is to benefit from GenAI as a result?



*Sample Size: 46 respondents | Survey: How IT and GCC Enterprises are helping Telangana build an AI Edge

Organisations investing in AI are experiencing higher level of readiness and higher than planned business outcomes

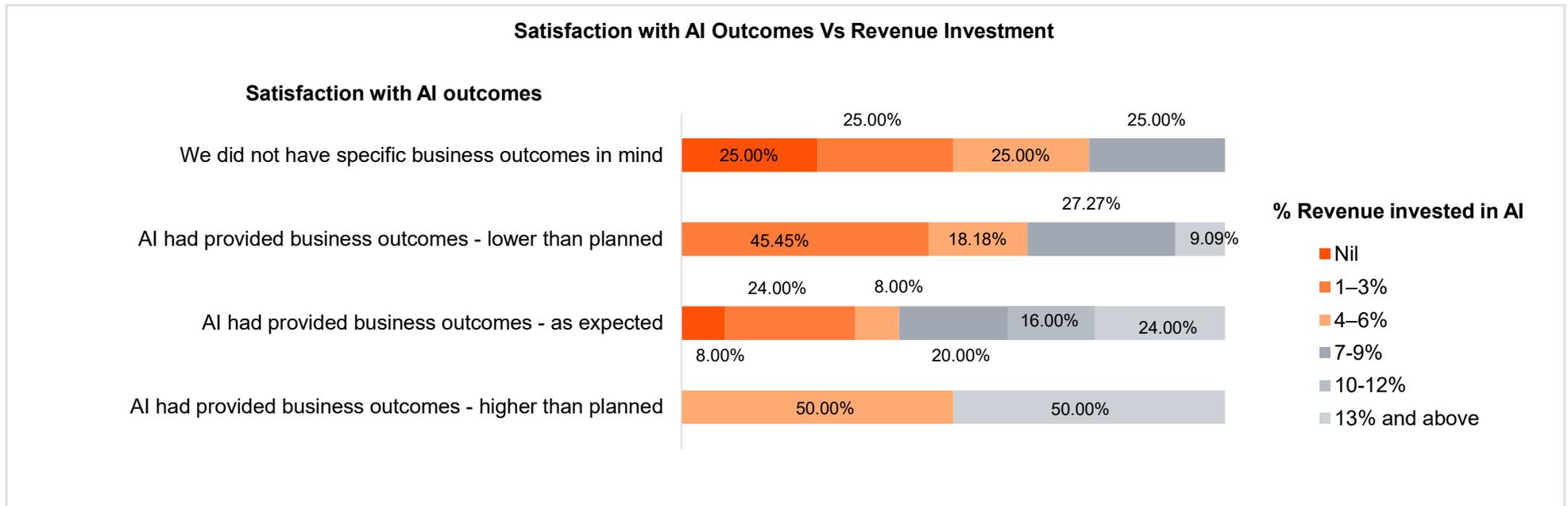
Our Findings

- Organisations investing 10–12% of their revenue in AI show 100% high readiness, indicating that committed spending directly strengthens GenAI maturity.
- Organisations investing 13% or more also show very strong readiness, with all of them rating themselves in either very high or high readiness.
- Organisations investing 7–9% or 4–6% show a mix of high and moderate readiness, suggesting that mid-level investment builds capability but may not be enough to scale confidently.
- Organisations investing only 1–3% show mixed readiness, with some in high but many still in moderate or low readiness, reflecting slower progress.
- Organisations with nil investment have the widest variation and the weakest readiness, showing clearly that no investment results in limited AI preparedness.

Notes

Outcome quality improves significantly as AI investment increases

Q. To what extent do you feel the revenue your organization invests in AI initiatives is justified by the outcomes and value delivered?



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Outcome quality improves significantly as AI investment increases

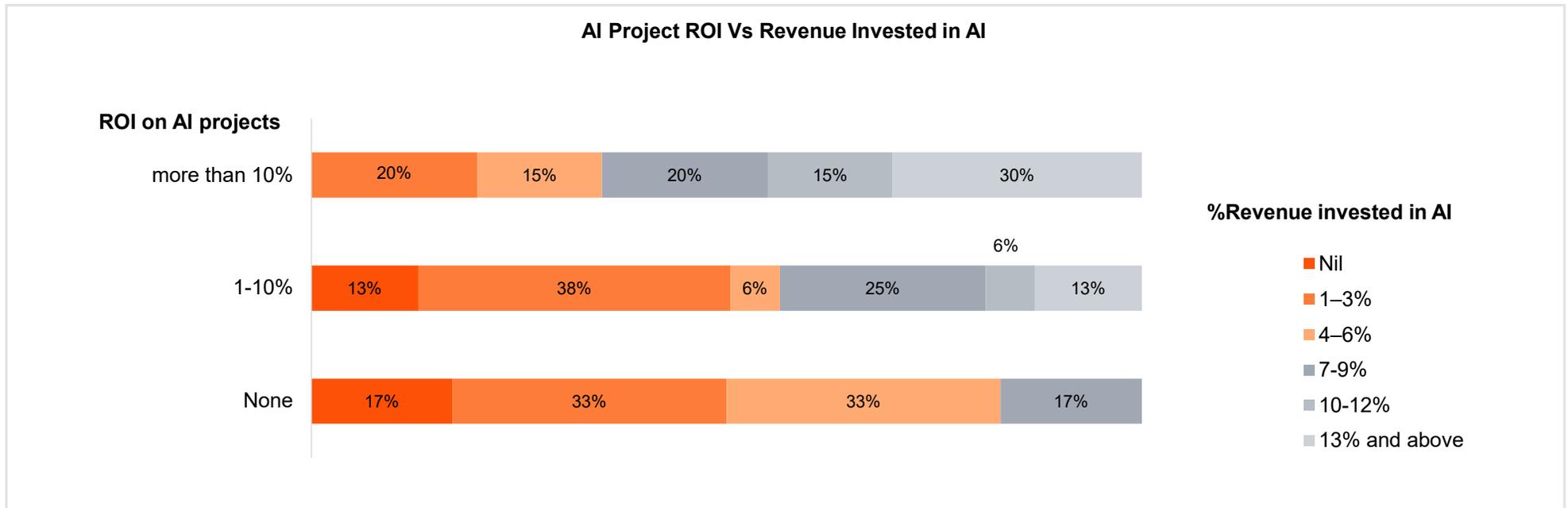
Our Findings

- Organisations that did not set clear AI goals are unsure about the value they received, and their investments are scattered across all levels.
- Organisations that felt AI delivered less than planned mostly invested at lower to mid levels, showing that limited spending leads to limited results.
- Organisations that achieved expected outcomes typically invested at steady and meaningful levels, which helped them meet their targets.
- Organisations that achieved higher-than-planned outcomes are those that invested more seriously in AI, proving that stronger investment brings stronger returns.
- Overall, organisations see better AI outcomes when they invest more and define clear business expectations from the start.

Notes

High quality AI investments are translating into massive cost reduction—as expected in the first phase of any disruptive tech diffusion

Q. How would you rate the ROI achieved from your AI projects relative to the percentage of revenue your organization invests in AI?



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High quality AI investments are translating into massive cost reduction—as expected in the first phase of any disruptive tech diffusion

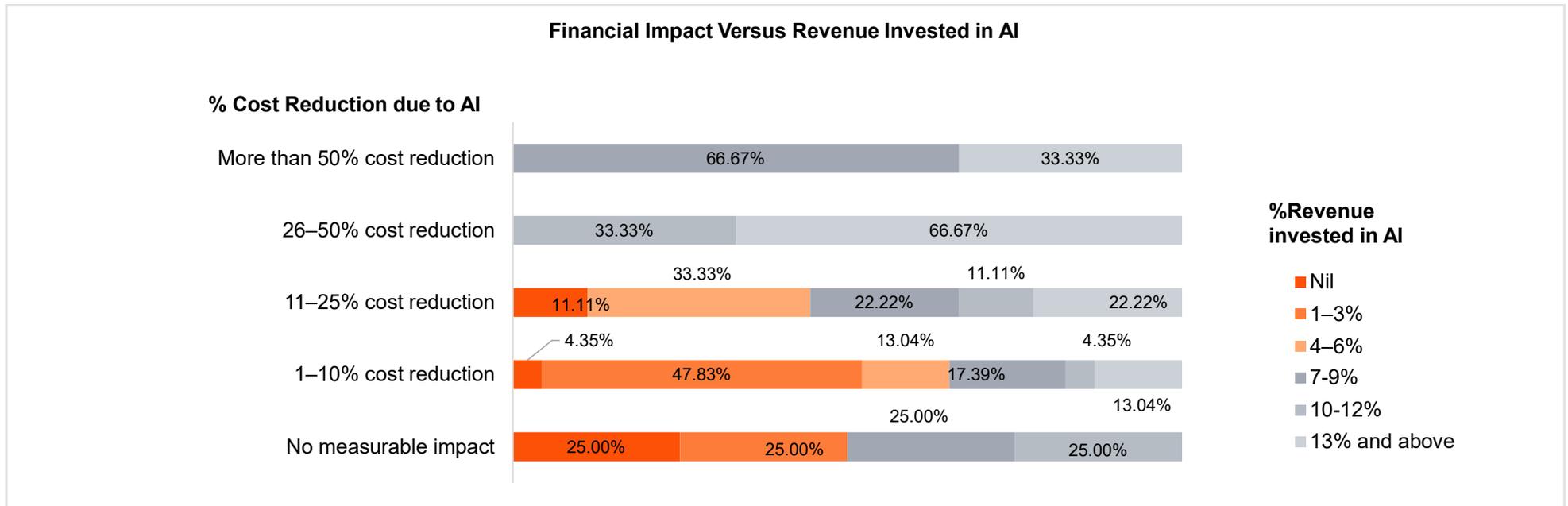
Our Findings

- Organisations that invest more seriously in AI are the ones most likely to see strong ROI, including double-digit returns.
- Organisations that spend very little or nothing on AI mostly end up with no measurable ROI, as small pilots don't scale enough to show impact.
- Moderate returns (1–10% ROI) appear across almost all investment levels, meaning most Organisations get some benefit once they start investing.
- Overall, meaningful investment combined with good execution leads to the best returns, while under-investment leads to limited or no payoff.

Notes

Meaningful financial impact emerges at stronger levels of AI investment

Q. How well do you think your organization's AI investments are translating into real financial impact or business value?



*Sample Size: 46 respondents | Survey: How IT and GCC Enterprises are helping Telangana build an AI Edge

Meaningful financial impact emerges at stronger levels of AI investment

Our Findings

- Organisations that invest 10–12% or 13%+ of their revenue in AI are the ones seeing the highest levels of cost reduction, including savings above 50%.
- Organisations investing in the 7–9% range also show strong cost benefits, especially in the 26–50% reduction band.
- Organisations that invest only 1–3% mostly see small cost reductions (1–10%), showing limited impact from low budgets.
- Organisations with no AI investment largely report no measurable cost impact, reinforcing that value requires actual spending.
- Overall, the data shows a clear pattern: the more an organisation invests in AI, the greater the financial impact—especially in cost reduction.

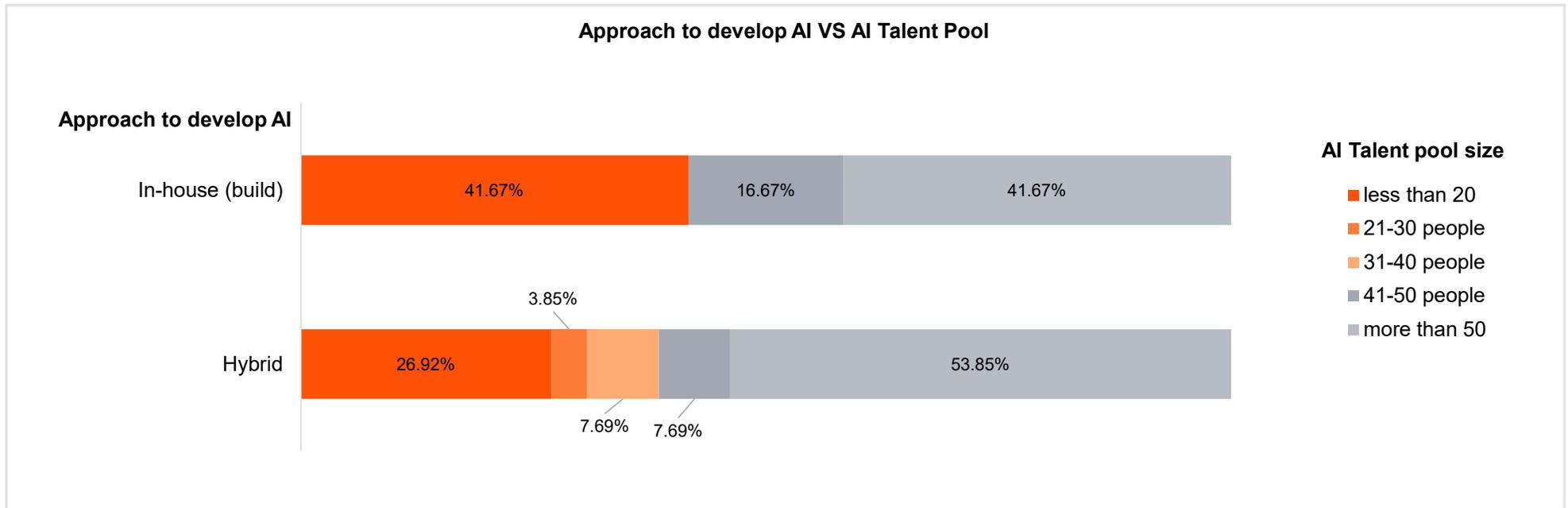
Notes

04

AI Talent Pool & Governance

Building AI the Right Way: Growing Talent and Strengthening Governance Together

Q. What best describes your organization's current AI talent strength and the approach it takes toward developing AI solutions



*Sample Size: 46 respondents | Survey: How IT and GCC Enterprises are helping Telangana build an AI Edge

Building AI the Right Way: Growing Talent and Strengthening Governance Together

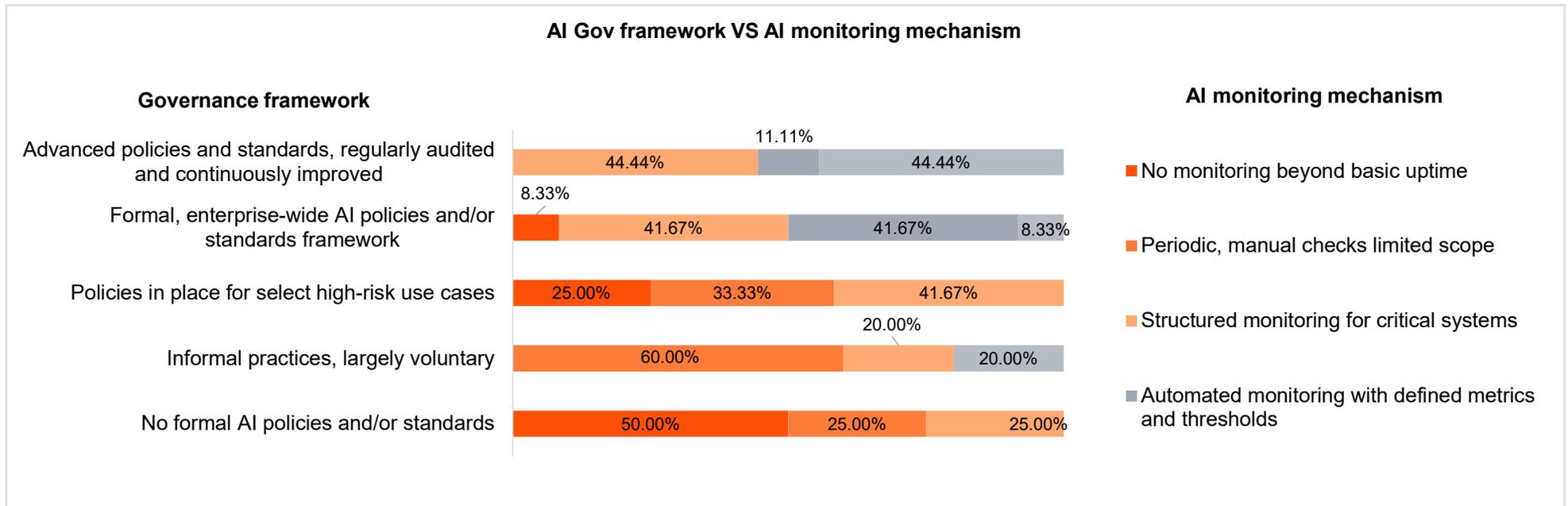
Our Findings

- In-house build is used most by very small teams (<20) and very large teams (>50) - 41.67% each; only 16.67% comes from mid-sized pools.
- Hybrid model is led by very large teams at 53.85%, with 26.92% from very small teams and the rest from mid-sized teams.
- Overall, As the AI team grows, organisations shift from in-house to hybrid; mid-sized teams appear but are a smaller share.

Notes

Robust governance frameworks enable structured and continuous AI oversight

Q. How mature do you believe your organization's AI governance framework is compared to the effectiveness of its monitoring and oversight mechanisms?



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Robust governance frameworks enable structured and continuous AI oversight

Our Findings

- Organisations with advanced AI policies mostly have strong monitoring, either structured or automated, showing that mature governance goes hand-in-hand with mature oversight.
- Organisations with formal enterprise-wide AI policies show a balanced mix of monitoring approaches, but many still rely on manual checks, indicating room to strengthen oversight.
- Organisations that only have policies for high-risk use cases lean heavily on periodic or basic monitoring, showing partial maturity in both governance and supervision.
- Organisations with informal or voluntary practices rely mostly on basic uptime checks, reflecting low governance and weak monitoring discipline.
- Companies with no AI policies have the least developed monitoring, reinforcing that without governance structure, robust oversight does not exist.

Notes

05

Key Takeaways for Leaders



Turning Insights Into Action: What Leaders Must Do to Unlock AI's Full Value

Prioritise high-quality, well-targeted AI investments with a 'quality-first' approach



Expand and Strengthen the Internal AI Talent Pool



Focus on Clear Differentiation and Education around AI Technologies



Strengthen AI governance frameworks and ensure a human-in-the-loop (HITL) for all critical monitoring and oversight mechanisms.



Scale AI investments deliberately to unlock measurable business impact



Driving AI readiness and impact requires not just investment but also an integrated approach spanning talent, clarity, governance, and operational maturity. CEOs should champion a comprehensive AI strategy that balances these dimensions to unlock full business value from AI.

Thank you



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