
AI innovation is nonstop. Your cloud foundation should be too.
The no-regret moves to get your cloud AI-ready now
accenture

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There is more cloud ahead than behind

Many companies treat their cloud journeys as complete once scalability and uptime targets are met and modernization checklists are signed off. But the reality is, there is more cloud ahead than behind. Today's cloud is no longer just "public cloud," but a flexible, governed fabric that aligns technology choices to business and industry needs. Meanwhile, AI is accelerating—from classical and machine learning to generative, agentic, ambient and physical. This has redefined what cloud must do to make AI a driver of productivity, growth and competitive advantage across an organization. When modern cloud becomes the foundation of an adaptable digital core, AI can deliver measurable impact by operating as an integrated system rather than a collection of disconnected initiatives. Every other dimension of the enterprise—strategy and business model, work and workforce—rests on this foundation.

The expanding definition of cloud

To scale AI, you need a modern, resilient digital core that is designed for continuous change. For most organizations, that foundation is cloud-based. Today's cloud is not a single destination. It's a journey that spans public, private, hybrid-, multi-, sovereign cloud and edge, where workload placement is driven by factors like latency, government regulations, risk and economics. It means running the right workloads in the right places, with governance, security and observability built in, and embracing cloud-native tools and practices.

The shift from cloud as a destination to the foundation for AI is already underway. BBVA, one of Europe's largest banks, for example, needed a modern infrastructure that could scale globally while meeting local regulatory requirements and unlock agility to respond to clients' changing needs. To achieve this, it launched Analytics + Data + AI (ADA), a cloud-native data and AI platform built from the ground up to serve as a single operating foundation across all its markets.

ADA gave BBVA the scale, speed and security to embed AI deeply into the enterprise, supporting everything from advanced analytics to generative AI. By consolidating data across geographies, the platform eliminated legacy complexity and enabled real-time insight. Users can access governed, scalable AI and analytics tools, accelerating decision-making, improving efficiency and driving the development of more personalized client services. The platform also laid the foundation for decentralized data ownership and enterprise-wide experimentation, giving BBVA a lasting strategic advantage.[1]

8%

of organizations have cloud dedicated to experimenting with advanced technologies.

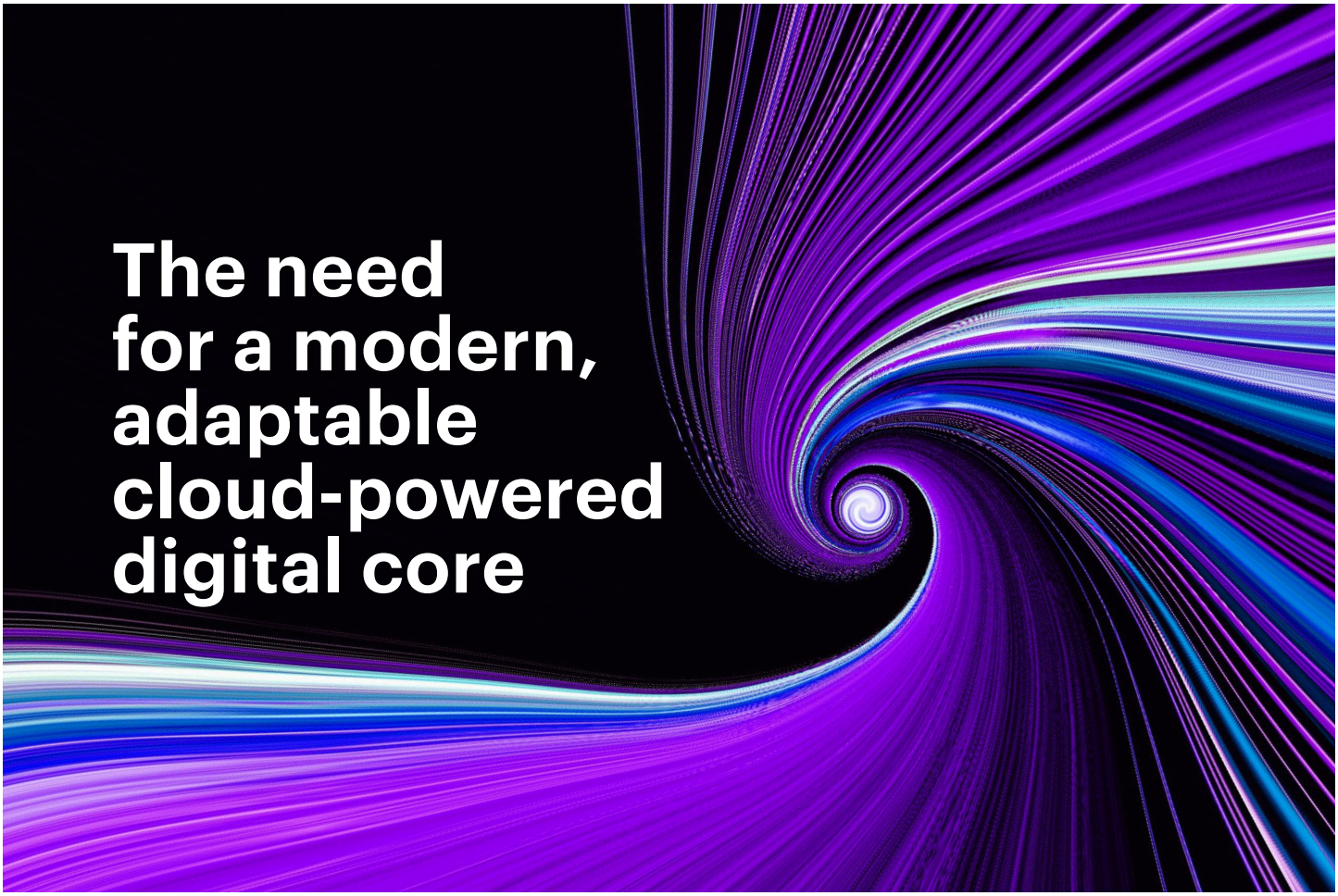
In our analysis of 216 clients' cloud environments, drawing on a survey of our senior practitioners working directly with those organizations' cloud and digital cores, only 8% operate at a level similar to BBVA's today (See 'About the research' for further details.). Meanwhile, in Cisco's recent AI Readiness Index, more than half of respondents report that their cloud infrastructure still cannot support AI at scale. This leads to shortcuts that create "AI infrastructure debt"—hidden point integrations, one-off data pipelines, shadow GPU spend, duplicated vector stores, unchecked model drift and manual approval workarounds—which compounds every quarter.[2]

In our research, cloud estates fell into three categories based on maturity across cloud migration, observability, data and AI-readiness and automation: Stabilizers are constrained by legacy systems or regulatory requirements that limit cloud migration and

slow AI adoption. Optimizers have modernized selectively with a focus on building efficiencies, and have yet to unlock new growth and experiences with AI. Innovators, a small but expanding group, continuously embrace the cloud in its various forms to build unified platforms where data, AI and operations work as one to drive new efficiencies, new revenue and new experiences.

Rooted in our research, executive interviews and experience across tens of thousands of cloud projects, this playbook offers a practical way to move from any starting point toward an Innovator-level North Star, based on a company's unique priorities and industry realities. **Stabilizers** stop value leakage and free capacity for further modernization. **Optimizers** convert steady operations into faster learning loops and intelligence-driven growth. **Innovators** continuously reinvent with AI in the workflow, enabling breakthrough products, services and experiences.

The goal is to build practical momentum now, with each step expanding the opportunities that increasingly AI-enabled enterprises can pursue. The playbook brings this to life through readiness profiles, targeted actions and industry proof points. It helps you identify where you are, understand what's holding you back and move forward by modernizing key workloads, aligning value, embedding security and building a cloud architecture ready for AI at scale.



The need for a modern, adaptable cloud-powered digital core

Reinvention with AI is not a single leap, but a flywheel: data feeds models, models inform decisions, decisions trigger actions and every action generates business results and new data. It spins only as fast as a company's digital core, the modular, cloud-based technology foundation that allows systems, data and AI capabilities to be integrated and changed quickly in response to shifting regulations, macroeconomic conditions or business needs.

Cloud sits at the foundation of a modern digital core, providing the shareability, scalability and security needed to support AI. It offers access to a flexible array of foundation models, data products and AI services; delivers the elastic compute and storage needed to train, deploy and run AI across the organization at scale; and embeds controls and governance—from data to model to agent to platforms. And today's cloud capabilities are being defined by the demands of AI. AI raises the bar for latency, observability and data fidelity. It rewards

real-time event flows over batch jobs, composable services over monoliths and built-in data quality rules over retroactive checks.

Today's cloud is no longer a fixed destination: it's a governed fabric across public, private, hybrid-, multi-, sovereign cloud and edge that helps companies adapt to business, regulatory and technology shifts. In industries like banking or government, for example, increasing sovereignty concerns are driving adoption of private and hybrid clouds. While making these strategic choices, companies should balance the rapid innovation and access of public cloud; the control and compliance of private cloud; speed and reliability of edge and on-premises systems; and the flexibility and resilience that comes from choosing multiple vendors.

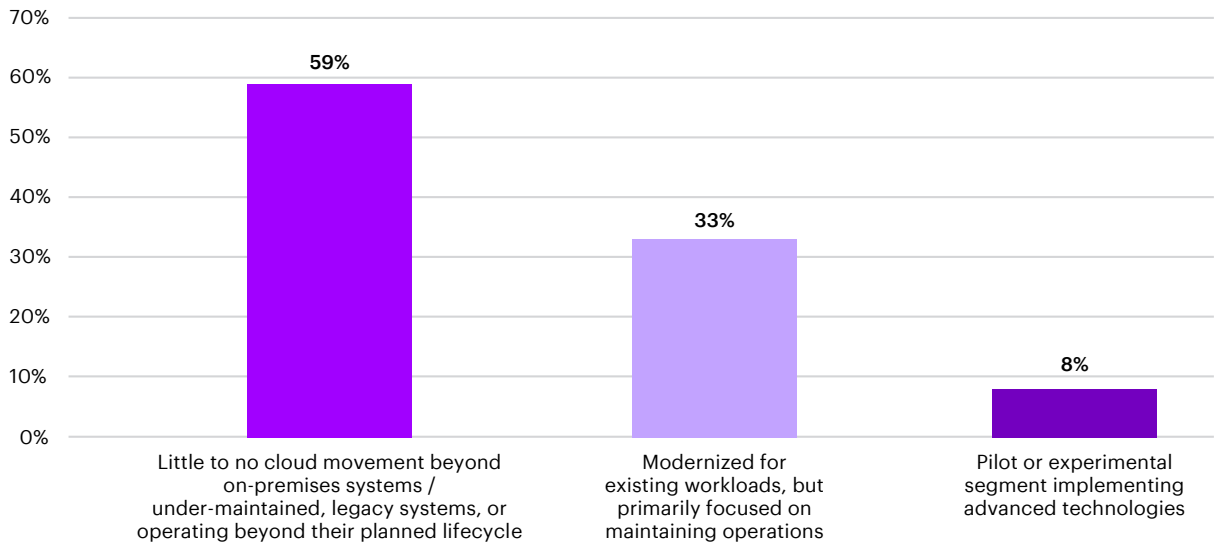
Beyond infrastructure, cloud is the foundation for how you build, how you organize and how you operate in the AI era. It includes AI-native services and core principles like pay-as-you-go models, application programming interface (API) access, automation and observability. It unifies data, embeds AI directly into workflows, automates resilience and supports AI FinOps—the practice of managing the entire AI stack, including cloud, data, compute and models, on profit-and-loss-like principles. In this model, technology spend is visible, accountable, optimized and explicitly tied to business value.

When cloud, data and AI operate as one adaptive system, each deployment moves faster, each insight sharpens the next and the platform becomes a compounding advantage.

According to our maturity assessment of 216 companies, however, most core workloads remain on-premises or trapped in under-maintained systems running beyond their intended lifespan (Figure 1). A third are modernized just enough to keep operations stable. Only 8% are dedicated to experimenting with advanced technologies.

Figure 1: Average maturity of cloud workloads: The easy moves are done; complexity remains

Q. Please estimate the percentage of your client's cloud estate (workloads, applications) that fall into each of the following maturity levels.



Source: Accenture Research analysis. N=216.

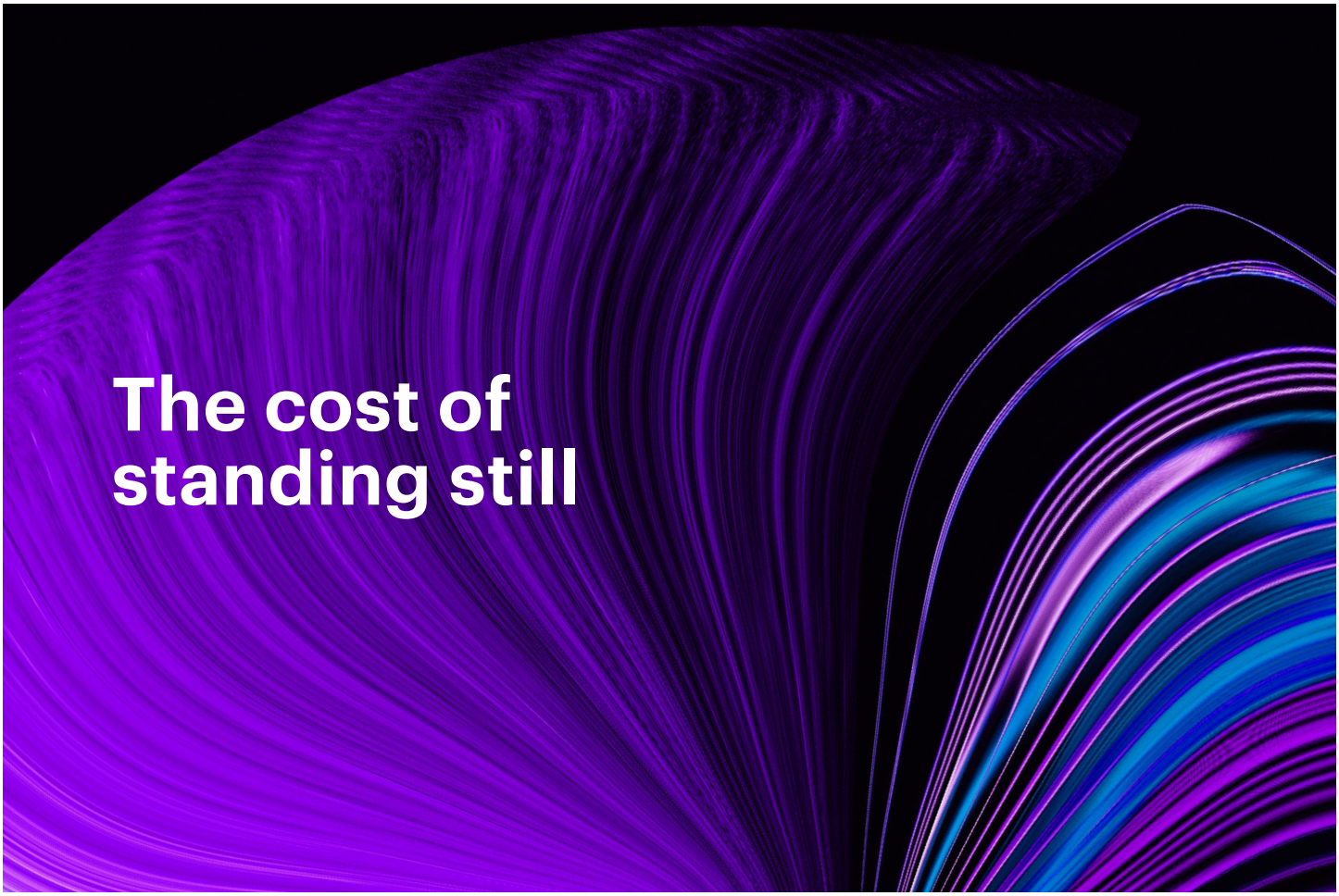
Just one in five organizations has migrated 80% or more of their applications. The easy moves are done, but the complex systems—monoliths, mainframes and regulated workloads that sit in the flow of revenue, compliance and control—remain. Modernizing these requires deep domain and industry knowledge.

The macroenvironment adds complexity: Forces like economic volatility, geopolitical fragmentation, regulatory pressure and intense competition all define where your cloud and workloads should sit. Besides, the problem isn't just "lack of cloud," but integration challenges. Inconsistent identity, security controls, observability and data governance across on-prem, private and public environments can deter modernization progress.

86%

of C-suite executives plan to increase AI investment in 2026.

Meanwhile, AI is innovating non-stop—and your cloud estate needs to keep pace. Our Pulse of Change research shows that 86% of C-suite leaders plan to increase AI investment in 2026 and 78% of those leaders view AI as more of a revenue growth than cost reduction play. At the same time, 35% acknowledge that having the right data strategy and core digital capabilities is a top priority for accelerating and scaling AI.[3] AI adoption without the platform to support it results in mounting AI infrastructure and integration challenges and a growing gap between ambition and execution.



The cost of standing still

As AI models and agents speed ahead, any lag in cloud and data maturity puts the brakes on growth and resilience. Our research shows that lapses in cloud readiness tend to manifest across five areas: from vision and execution to competitive positioning to operating discipline, all the way down to data readiness and trust. Each gap comes with a cost that further erodes your organization's chance at future competitiveness.

1. Strategy–execution gaps: When ambition outpaces reality

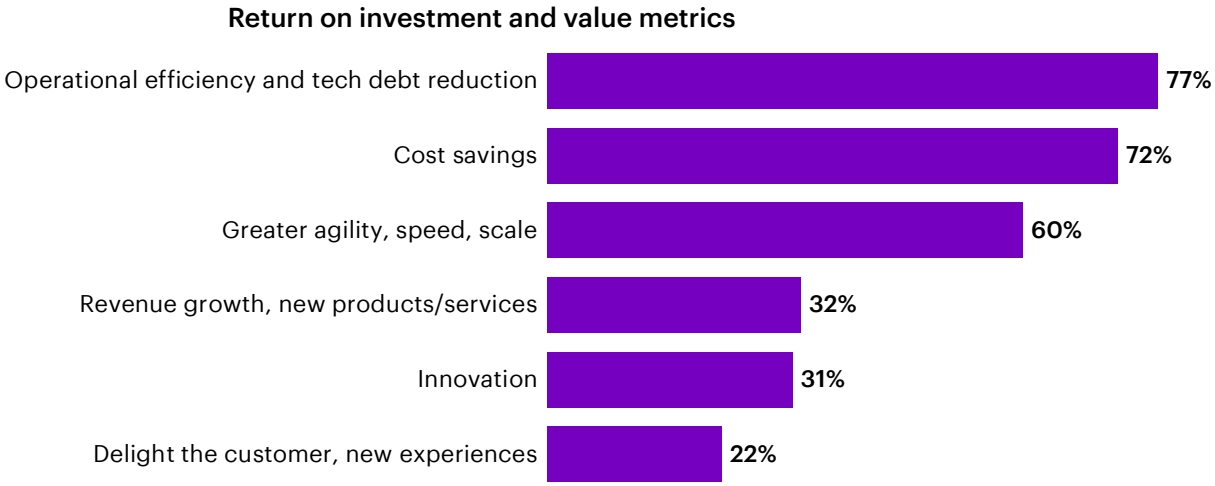
Over 60% of cloud strategies are not aligned with long-term business goals and only 13% of the companies we analyzed have fully integrated business and cloud strategies. As a result, migration-only cloud investments often deliver incremental IT improvements, not enterprise reinvention.

2. Innovation lockout: Starving tomorrow to fund today

Investment still favors operational efficiency over innovation: Only 22% of companies prioritize transformative bets in new experiences (Figure 2). When growth initiatives are deferred, each quarter's delay further solidifies your place in the past.

Figure 2: Metrics skew toward efficiency and cost over innovation and growth

Q: Which of the following metrics does your client prioritize while measuring value and the return on investment of cloud initiatives? Please rank the top 3 with 1 being the top priority.



Source: Accenture Research analysis. N=216.

3. Structural cost inefficiency: When saving starts to cost you

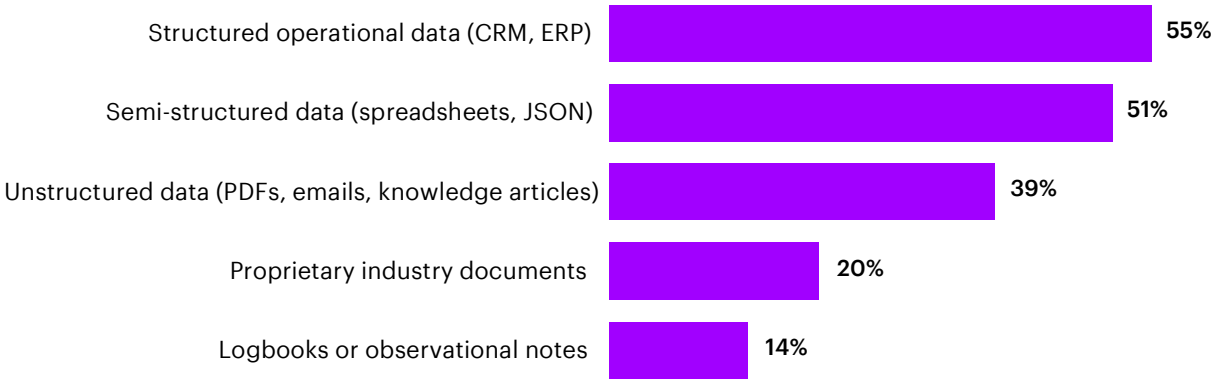
Four in five companies have moderate to little observability across their IT landscape and 40% lack mechanisms to track cloud value or spend. Pausing modernization to cut costs can have the opposite effect: Cost structures harden, run budgets expand, observability declines, incidents last longer, spend becomes noisy, all while technical debt rises.

4. Data bottlenecks: The hidden constraint on AI ambition

Until more of the data estate is governed in cloud and connected end-to-end, AI pilots won't scale. Increasing investments will have little impact. Our research shows that among those migrating data to the cloud, just 39% are moving unstructured data, which is the fuel for AI (Figure 3). Most organizations haven't prepared their data for AI at scale: only 2% have fully integrated data and AI to enable real-time insights and 42% work with siloed data.

Figure 3: Migration of unstructured data lags, limiting AI

Q: What types of data are being migrated to the cloud to enable different forms of AI (machine learning, classic AI, gen AI, agentic, physical, etc.) or advanced analytics? (Select all that apply)



Source: Accenture Research analysis. N=216.

5. Cybersecurity and control exposure: AI raises the stakes

AI accelerates cyber risk by creating new attack vectors and by increasing the sophistication and speed of attacks. Despite rising threats, only 11% of organizations have real-time, integrated cybersecurity across cloud and on-premises environments. Without modernized architecture and integrated security, organizations face growing exposure just as threats become faster and more automated.

As these gaps widen, standing still is not neutral. In an AI economy, it is a strategic decision, with predictable consequences.

Three strategic pathways to AI-readiness

All organizations will need to traverse these gaps to progress toward the level of cloud maturity that allows for continuous business reinvention with AI. It's just a matter of how fast. Starting points vary, and the pace required depends on numerous factors—including industry, appetite, resources, regulations and strategy—but all organizations must eventually navigate a shared set of challenges. Our research suggests that companies are on three broad pathways to cloud maturity, based on where they begin: **Stabilizers** strive to overcome legacy constraints and stalled migrations, **Optimizers** have a solid foundation, but must push further to scale innovation and **Innovators**, a small but growing group, are turning platform strength into faster releases, new experiences and growth. With the right actions, companies can move through these pathways at a pace aligned to their unique regulatory needs, industry realities and business priorities.

Stabilizers

Strengthen the foundation to rebuild trust in cloud

A global food company moved to cloud but faced a post-migration cost shock when its cloud consumption spiked and it exhausted its allocation 40% earlier than expected. With limited cost visibility from incumbent providers and no sustainable cloud operating model in place, the business struggled to respond.

Following our FinOps playbook, the company established clear ownership, better tagging, product-level spend transparency and guardrails tied to business goals. This delivered an immediate 15% reduction in cloud costs and identified an additional 50% in storage optimization. More importantly, it restored confidence in the cloud strategy and freed up funds to reinvest in growth. With greater visibility, governance and control, the company moved from reactive cost management to a proactive, value-driven approach to cloud.

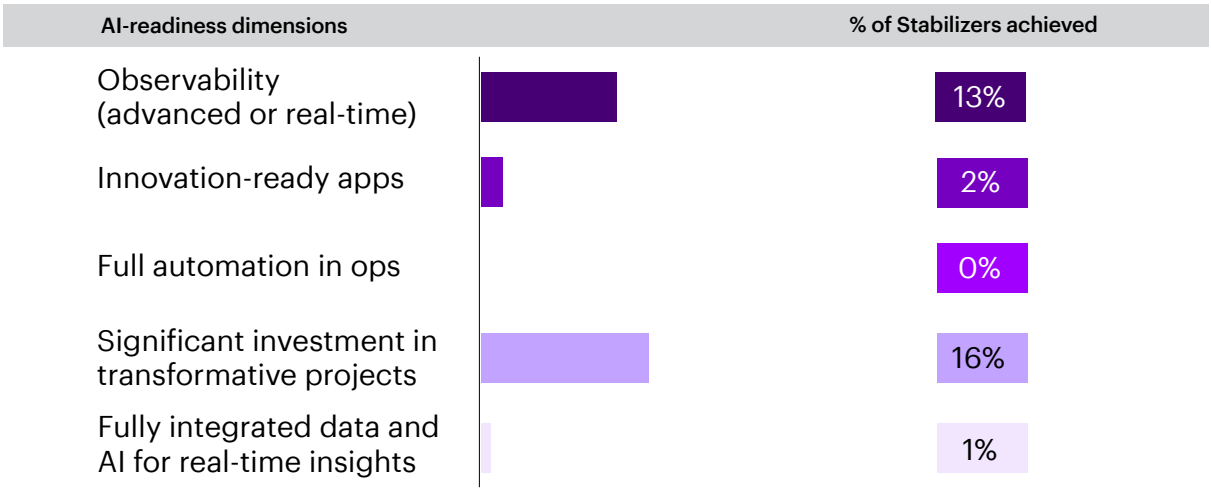
1/3

of Stabilizers have more than 70% of workloads on-premises

This isn't a one-off scenario. For many Stabilizers, cloud adoption stalls after initial efforts, trust in the model erodes and every release is weighed down by complexity. About 60% of companies fall into this category: nearly half of them have 40–55% of their workloads on-premises and roughly a third have more than 70%. Automation is minimal and legacy systems dominate. Investment is weighted toward maintenance and even small changes take long.

Cloud controls show the same pattern (Figure 4). Only 13% of Stabilizers have advanced or real-time observability, none have fully automated their cloud operations and just 2% have innovation-ready apps. This results in sluggish incident response, low visibility into cost drivers and long lead times to launch anything new. Teams spend mornings resolving yesterday's incidents and afternoons navigating yesterday's systems.

Figure 4: Stabilizers - Where readiness breaks down



Source: Accenture Research analysis.

For Stabilizers, the key barrier to modernization is strategic misalignment. Fewer than half have cloud strategies aligned with long-term business goals. Budgets default to efficiency over transformation. The shift to usage-based cloud spending adds uncertainty, especially where earlier efforts led to billing surprises. Without observability and value tracking, it's hard to justify further investment. Architecture inertia adds to the challenge: Critical systems are complex, opaque and hard to modernize. Operational friction resulting from partial automation, siloed data and bolt-on security slows delivery. Fragmented controls across cloud and on-premises environments mean every release feels like a risk instead of progress.

To rebuild trust in cloud migration, Stabilizers need to treat cloud transformation not as a moonshot but as a cash-and-capacity unlock.

Begin with a handful of high-impact, customer-visible systems for modernization and make them observable in real time, reduce incidents, speed up releases and flatten operating expenses. Fix the basics: cut costs, reduce tech debt and improve reliability, paving the way to new revenue, new markets and new experiences.

Energy and utilities companies, for example, can address safety and reliability requirements while moving the needle on efficiency and cost by modernizing legacy infrastructure—predictive maintenance alone can save millions by avoiding unplanned downtime. Banks too can look at cloud as a business imperative to reduce risk, cut costs and increase productivity—whether that means moving to the cloud or bringing cloud tools and principles to on-premises environments to address regulatory requirements. Healthcare companies facing high stakes and tight budgets benefit from moving quickly and securely on opportunities to deliver higher quality services more efficiently with cloud.

Actions to take

01

Tie business value to your cloud posture.

Connect cloud to business objectives. Start with immediate enterprise needs—cost control, resilience, regulatory compliance—and translate them into measurable targets to guide funding and prioritization. Engage business leaders to map broader growth objectives like revenue growth or market share to clear modernization and retirement decisions. Establish a governance structure that keeps cloud decision-making anchored to business value, ensuring cloud stops being a technical problem and becomes a lever for risk reduction today and growth and reinvention tomorrow.

02

Design a modern enterprise architecture foundation.

Start by selecting the right compute, data, networking, security and platform capabilities to fuel your growth ambitions. Decide early where you need sovereign, private or edge footprints to meet speed and regulatory needs. Then create a secure, ready-to-use cloud environment as a landing zone with identity management, encryption, network segmentation and policy-as-code. Be intentional about where your data lives and organize it so that AI systems can find and use it quickly and reliably: Define data products with lineage so that models get the right signals at the right speed. Engage with the right ecosystem partners to take advantage of rapid innovations and access to AI capabilities, while aligning with business, industry and regulatory needs.

03

Modernize across the continuum.

Rather than forcing a single-path cloud migration, build modern capabilities across your entire technology landscape: on-premises, hybrid and multi-cloud. Invest in containerization, API layers and cloud-native tooling that work everywhere. Since cloud is not just about infrastructure but also about how work gets done, adopt Agile and DevOps practices and establish a modern data foundation to give teams a trusted, unified view.

04

Go all-in on full-stack FinOps.

This makes spend transparent across multi- and hybrid- cloud estates and ensures that every dollar spent on cloud drives measurable business value. Break down silos and create shared ownership of cloud costs across finance, engineering and product teams, and operations. Provide real-time visibility into these costs, both future and past, for all stakeholders with capabilities like granular cost allocation and cost-risk-performance policy, which also give executives a clear view of total ownership and the cost impact of their deployments.

05

Boost end-to-end observability and security.

Build systems that collect real-time metrics to detect issues early and improve performance, for example, spotting payment errors and slow checkouts before customers are affected. Use these signals to create a feedback loop that improves stability now and supports AI adoption later. Position the Chief Information Security Officer (CISO) as a Cloud CISO and collaborate with them for end-to-end visibility and for securing data, applications and AI workloads across the cloud landscape. Establish clear cloud access governance to enforce least-privilege access for AI models, data and cloud resources. Advocate for faster tech debt elimination to reduce vulnerabilities.

Optimizers

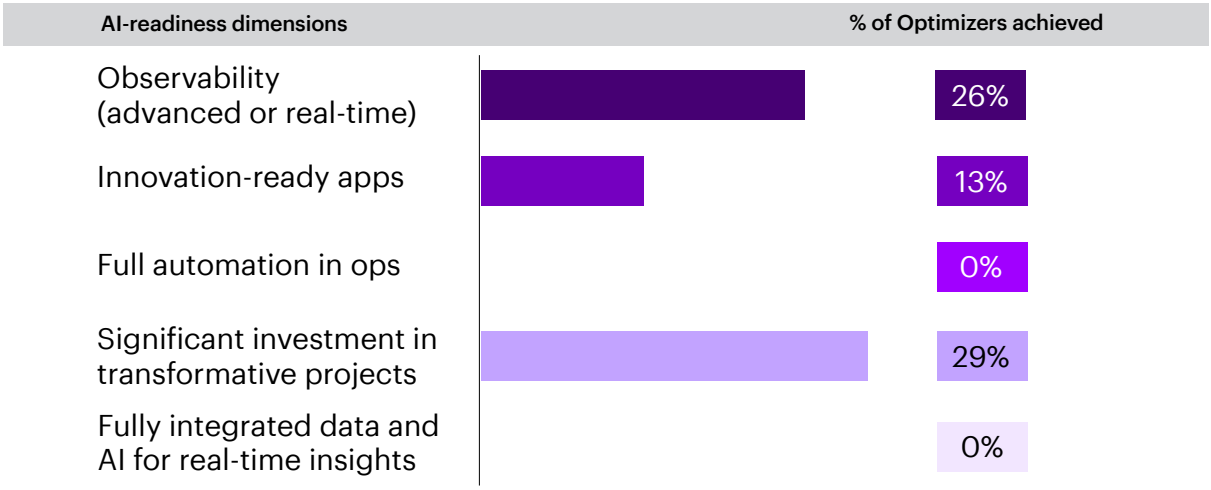
Move from one-offs to repeatable innovation

Brazil's surging energy market, fueled by growing consumer demand and investments in data centers and AI services, has created a need for modernized, flexible operations. Eneva, a leading integrated energy company in this market, needed deeper, real-time visibility into its assets and operations to meet rising energy demand and improve reliability.

It implemented a cloud–based data and AI platform that unified exploration, production and operations data and made it accessible across teams. AI assistants and optimization tools help anticipate equipment failures, prioritize interventions and reduce unplanned downtime, while maintenance teams focus on higher-value activities. This has resulted in stronger cash generation and a scalable digital backbone for future growth.

Many Optimizers—roughly a third of the companies we analyzed—are ready to do the same. They have completed their core migrations and built stable cloud estates, but these are designed for continuity, not innovation. Observability is decent (Figure 5) but not universal; automation is limited and AI supports the work but doesn't transform it. With investments supporting predictability over breakthroughs, Optimizers can ship the next feature reliably but struggle to launch the next big bet.

Figure 5: Optimizers - Continuity surges, but creation stalls



Source: Accenture Research analysis.

Data maturity shows progress: 57% of companies have achieved basic data integration and AI-driven analytics. But compliance and data security remain the top constraints in moving data to cloud, cited by 60% and 58% of respondents, respectively. For another 32%, data sprawl and integration challenges are a primary blocker, delaying AI adoption. Risk teams tend to engage early, but controls are rebuilt each time. Short-term hiring for migrations results in scarcity of permanent talent to redesign processes with AI.

Optimizers have the right foundation. The opportunity now is to break out of incrementalism and build a repeatable path to innovation.

For instance, financial services companies can capitalize on the growth potential of AI-driven processes like AI-enabled Know Your Customer (KYC). Retail and consumer goods companies sit on a goldmine of structured and unstructured data on customers, supply chains and market trends. With a connected cloud foundation, they can use agentic AI to turn this raw data into operational signals—like better forecasting and returns—that help them improve margins, reduce waste and respond faster to changing markets. In the public sector, using a secure cloud foundation to break down data silos across government agencies could advance their ability to serve populations more holistically and efficiently.

The best path is to start with one revenue-critical journey like pricing, claims or parts availability and rebuild it end-to-end on a modern platform, tying intelligence, performance and cost to business outcomes. Then codify the pattern—templates, controls and runbooks—so future journeys scale faster, more safely and with greater confidence.

Actions to take

01

Embed intelligence on a composable AI platform.

Think of working with cloud as building with Legos: Assemble solutions from reusable blocks of data products, pipelines, pre-approved guardrails and templates. Start with revenue-critical applications—whether custom-built or industry platforms. Create a governed cloud layer to make structured and unstructured data accessible and add business meaning by defining entities and how they work together. Embed decision support into the tools teams use every day to facilitate real-time action.

02

Use cloud and AI capabilities to accelerate modernization.

Modernize applications in the cloud so they're easier to deploy, secure and monitor. Break the work into small, manageable steps—using APIs and event-driven architectures to ensure continuity and seamless communication across hybrid and multi-cloud environments. You don't need to wholesale shut down mainframes to modernize: Make them observable, put APIs in front and keep changing around them, then retire what's actually holding you back.

Generative and agentic AI tools can dramatically accelerate code upgrades, refactoring, testing and defect resolution—removing long-standing barriers to modernization. Leverage cloud-native observability to gain real-time production insight and embed decision support directly into business workflows. Feed cost into observability tools so that it is treated as a performance metric. As you progress, streamline the overall application portfolio (apps, tools, licenses) and modernize mission-critical systems like ERPs and mainframes so the cloud becomes the default environment for change, not just a place to host workloads. Introduce AI FinOps on top of existing full-stack FinOps models to forecast the costs of AI use cases, establish ROI hypotheses and measure them over time. This helps manage the cost and value of cloud-powered AI workloads as they scale.

03

Drive human-led autonomous operations.

Lay the groundwork for self-managing systems by combining real-time health signals, early anomaly detection and automation that resolves issues before a war room is needed—with humans always in the lead. Automate software delivery through intelligent continuous integration/continuous deployment (CI/CD) pipelines. Deploy AI-enabled observability platforms that move beyond metrics to predict failures, auto-remediate issues and provide actionable recommendations across applications and infrastructure.

04

Make security automatic and AI safe from the start.

Adopt Zero Trust: Check every request, limit access and encrypt everything by default, using cloud to provide strong visibility, identity and continuous monitoring. Replace one-off compliance with security-by-design principles using approved reference architectures. Set up responsible AI governance so teams can experiment safely in the cloud.

05

Build AI-powered teams, not rotating crews.

Bring together a consistent team of product, engineering, data and machine learning and risk professionals to codify patterns for future builds. Hire dedicated AIOps and MLOps teams to manage and maintain AI systems, rather than assigning that work to existing DevOps teams that keep core applications running. Equip them with AI assistants and invest in targeted upskilling.

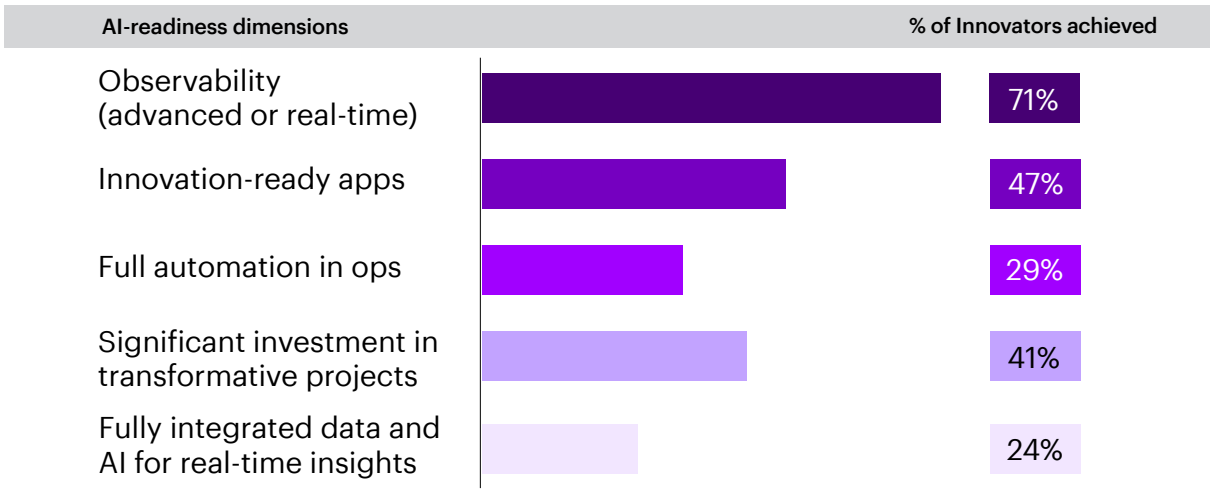
Innovators

Convert platform strength into enterprise-wide reinvention

Essity, a global health and hygiene company, is creating a robust and flexible cloud-based technology platform that will provide next-generation AI capabilities, on which Essity can test and scale solutions across their core business processes and functions. The first phase will focus on enhancing procurement and finance operations. Longer term, Essity plans to scale AI across the company to reinvent other end-to-end business processes, enabling new pathways to value and growth.[4]

This shift marks a new frontier, moving from local AI wins to enterprise-wide reinvention. Innovators, (about 8% of companies) are already on this path. More than half have advanced technologies running across 90% of workloads, supported by environments built for speed, with strong observability, automation and innovation-ready stacks (Figure 6). The next step is to connect pilots into unified, real-time flows that scale breakthroughs across the organization.

Figure 6: Innovators - Reaching milestones for reinvention



Source: Accenture Research analysis.

Innovators can scale reinvention by redesigning core processes and business models with AI in the workflow. Doing so requires expertise in AI engineering, data architecture and automation design, plus the ability to integrate AI-native workflows, manage complex, multi- and hybrid-cloud environments and build adaptive systems that can adapt as technologies evolve.

The challenge for Innovators is integration. Only one in four have fully integrated data and AI for real-time insights and less than a third have full automation across cloud operations. While 70% of them already use cloud-native patterns and prototype rapidly on governed data, securing that data in real time as pilots scale is difficult.

The next moves should target board-level outcomes: new revenue, margin lift and share gain.

In Life Sciences, for example, companies can use AI and agents to streamline long, resource-intensive drug discovery processes, resulting in boosted revenue, shareholder value and patient outcomes. It's where modernization meets margins: Each month saved in clinical development can translate to millions in market exclusivity.

In manufacturing, too, companies that invest steadily in legacy upgrades can evolve from efficiency gains to new experiences and income streams. Like Belden, which built a first-of-its-kind operational technology platform, Belden Horizon, combining cloud, edge and AI to deliver real-time insights from across customers' manufacturing facilities. This ambitious reinvention is opening new revenue streams and creating a direct link to customers as they digitize operations and prepare for an AI-driven future.

Actions to take

01

Reinvent core processes with agentic AI.
Business reinvention happens when you fundamentally redesign workflows for AI-paced, autonomous decision-making—which depends on a truly modernized cloud and digital core. Pick a mission-critical revenue or margin driver—pricing, supply chain, customer journeys—and create differentiating, multi-agent workflows that span your technology estate. As AI agents handle routine decisions autonomously, humans focus on exceptions and strategy. Capture exceptions as training data to refine prompts, policies and models, then scale the learnings across the organization.

02

Deploy agents with precision and trust.
Agents succeed when the scope is tight and guardrails are clear: defining what "good" looks like, when to ask a human and how to roll back. Track value and risk at the same time, measuring revenue impact and efficiency alongside accuracy, bias and security. Doing both is essential to earning trust beyond the pilot team.

03

Adopt a product mindset.
Shift from projects to a product operating model with accountable owners and cross-functional teams. CIOs say funding is accelerated when value is visible, not buried in cloud invoices. So, use scorecards to track growth metrics and the economics of AI decisions.

04

Turn capabilities into partner offerings.
Innovators are leveraging modern, cloud-powered digital cores to make high-value, AI-driven decisions every day, like preventing breakdowns. These can become priced services with a clear promise. Utilities might offer "price-smart power" with predictive pricing signals and load-shift plans. Automotive companies could provide fleets with advance repair windows and parts commitments.

Move fast to close cloud gaps

A great value migration is underway: $27 trillion in enterprise value (EV)* traded hands during the last decade, and the pace of this migration has doubled in the last two years—what we call the Age of AI.[5] This illustrates how AI is changing the landscape and accelerating the gap between companies that can adapt their digital cores to capture new value and those that cannot.

Cloud is no longer a migration milestone, it's the foundation for reinvention.

Those who take a holistic approach to cloud—architecting across public, private, hybrid, edge and sovereign—can scale AI to drive greater productivity, growth and competitive advantage.

*Value migration is the movement of enterprise value (the market's measure of a company's worth, including equity, debt and cash) toward the business models, sectors and capabilities that the market expects will deliver superior growth and profitability over time.

This shift puts responsibility squarely on the leaders who run the enterprise. Progress now depends on coordinated action across the C-suite and business leadership, not just IT.

For CEOs, a modern, flexible cloud-powered digital core is the only way to match the speed of markets and technology in need of perpetual transformation. It's what turns AI from experimentation into sustained performance, unlocking continuous business reinvention.

For CIOs, the mandate is changing—from managing technology to orchestrating intelligence across the enterprise. Modern cloud becomes the cornerstone of fit-for-future enterprise architectures and operating models, tying technology strategy to business outcomes.

CFOs must translate potential into sustained earnings to attract today's more future-focused investors.[6] A mature cloud with transparent unit economics allows CFOs to fund the right innovation bets, reduce structural costs and unlock new profit pools.

CHROs' success hinges on building and managing a human plus agent workforce that can collaborate at speed, while keeping humans in the lead. That requires cloud-driven insights, real-time skills intelligence, AI-augmented teams and a trusted environment for responsible innovation.

Supply chain leaders need cloud to unify data and planning across partners and enable real-time insights so they can pivot their strategies quickly. With AI ready architectures, supply chain teams can move beyond basic automation to scenario forecasting and autonomous decisions that improve cost, resilience and service.

For ecosystem leaders, value comes from integration. Partnerships only scale when they are connected through a flexible, governed cloud foundation.

And for **customer leaders,** cloud maturity shapes every interaction. Only 18% of customers say technology has improved their experience.[7] A connected cloud that flows insights across the organization can raise efficiency while delivering better outcomes for customers.

Across industries, roles and functions, cloud is a priority, unlocking the agility to pivot, experiment and iterate.

Many organizations still have cloud transformation work to do, but the pace of AI leaves little room for delay. Standing still is a decision—and a costly one. Cloud remains the ultimate no-regret move. Every organization can reach AI-readiness through a series of deliberate steps, with a clear view of what's holding you back and what opportunities lie ahead. Reinvention doesn't require betting the company. It requires honesty about your current cloud posture, focused investment in the journeys that matter most and disciplined execution that turns each win into momentum.

Strengthen the foundation. Make value visible. Put AI in the flow of work, not around it. Then repeat—faster and with more confidence each cycle.

How Accenture can help

Accenture helps organizations build modern cloud foundations to support AI-driven reinvention.

Our fit-for-purpose solutions scale intelligence securely across the organization, keep costs visible and controlled and move AI from isolated pilots into the flow of everyday work.

From strategy and architecture to modernization and operations—we work end-to-end, re-engineering core systems, data platforms and networks so AI can be trained, deployed and operated at scale across the enterprise. The result is faster decision making, higher resilience and a platform where each AI deployment builds momentum for the next.

Our cloud architectures are strategically designed to balance performance, data sensitivity, regulatory requirements and cost across hybrid, multi-cloud and sovereign environments. We enable organizations to innovate with confidence while meeting the demands of security, compliance and responsible AI.
And as AI capabilities evolve, we help clients continuously optimize the full stack using automation, FinOps and AI assisted operations. This links cloud and AI spend directly to business outcomes, not just infrastructure metrics.

Companies that lead aren't just chasing the latest AI model. They're doing steady, iterative work to strengthen their cloud foundations to build adaptable digital cores that enable AI to compound value over time. With vast cloud modernization experience, deep industry expertise and investments in data and AI, we're ready to help clients map their strategic path from experimentation to reinvention.

About the research

Internal practitioner survey

Unless otherwise stated, all data in this report refers to our internal practitioner survey, conducted among 216 Accenture professionals engaged in client-facing cloud transformation roles. Respondents were selected for their direct involvement in architecting and delivering cloud solutions that serve as the foundation for enterprise AI initiatives. The survey explored current adoption patterns, barriers to progress and the practices most strongly associated with successful cloud-enabled AI outcomes.

In-depth expert interviews

To complement the practitioner perspective, we conducted in-depth interviews with ten participants from large corporations—including technology leaders, cloud architects and AI program executives. Interviews were designed to surface nuanced insights on how organizations are structuring their cloud environments to support AI at scale, what distinguishes leaders and the strategic decisions that have proven most consequential. Findings from these conversations informed and enriched the broader quantitative analysis.

Case study analysis

The third pillar of our methodology consisted of a systematic case study analysis drawing from Accenture's extensive repository of client engagements. Cases were selected to represent a diverse range of industries, cloud maturity levels and AI use cases. Collectively, they illustrate how a robust cloud foundation translates into measurable AI business value and highlight the common pitfalls organizations encounter along the way.

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Acknowledgements

The authors would like to thank **David Parker, James Crowley, Ryan Oakes, Ramani Moses, Mathew Giju, Subhransu Sahoo, Pradeep Roy, Aditi Abhijeet, Pratik Janaikar, Ajay Garg, Salena Gallo, Kristin Bargeron, Joanna Duff, Micaela Soto** and **Janine Stankus** for their contributions to this report.

About Accenture

Accenture is a leading solutions and global professional services company that helps the world's leading enterprises reinvent by building their digital core and unleashing the power of AI to create value at speed across the enterprise, bringing together the talent of our approximately 786,000 people, our proprietary assets and platforms and deep ecosystem relationships. Our strategy is to be the reinvention partner of choice for our clients and to be the most AI-enabled, client-focused, great place to work in the world. Through our Reinvention Services we bring together our capabilities across strategy, consulting, technology, operations, Song and Industry X with our deep industry expertise to create and deliver solutions and services for our clients. Our purpose is to deliver on the promise of technology and human ingenuity and we measure our success by the 360° value we create for all our stakeholders.

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