



AI Engine Room:

From Vision to Value

2026 INDUSTRY REPORT
CHANGE MAKERS CLUB
IN PARTNERSHIP WITH



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Synopsis

The use of artificial intelligence in Italian companies has doubled in the last year, but its actual adoption is still limited.”

Reuters 2025

Italy looks set to lose 6% of its workforce by 2030 (Reuters, 2025), and leaders face a pressing question: how to achieve more with less? For many, artificial intelligence is the answer, and its use has doubled in the last year alone.

But its widespread adoption remains elusive, with only 16% having progressed beyond the pilot phase (Reuters, 2025). It's still difficult to identify initiatives that will boost long-term productivity, resulting in wasted investment.

Faced with a constantly shrinking working-age population, how can we identify concrete and successful applications of artificial intelligence capable of generating a lasting impact?

“ 83.6% say that lack of skills was the main reason why AI implementation has stalled ”

(Reuters, 2025)

“ Only 15% of Italian companies use artificial intelligence on a daily basis ”

(BCG, 2025)

“ Only 36% of Italian workers believe they have received adequate training on artificial intelligence ”

(BCG, 2025)

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Cisco, a global leader in technology, is not just building the infrastructure for the AI future; it's actively living it. Through its "Cisco on Cisco" initiative, the company is demonstrating how to integrate AI across every facet of its business – from empowering its workforce and redesigning workflows to optimising IT operations and enhancing customer experiences.

Cisco's intelligent solutions enable organisations to connect, secure, and automate their operations, making processes and working life for their employees smarter and more accessible. With a focus on AI-ready infrastructure, responsible AI practices, and a culture of continuous learning, Cisco is committed to supporting its customers and businesses to leverage AI to drive innovation, efficiency, and growth.

Topic Overview

AI ENGINE ROOM: FROM VISION TO VALUE

With Italy set to lose 6% of its workforce by 2030 (Reuters, 2025), leaders face an urgent question: how do you deliver more with less, before it's too late? For many, AI is the answer. Usage has doubled in the past year alone, and momentum is only accelerating.

But scale remains elusive, and just 16% have moved AI beyond pilot (Reuters, 2025). The rest struggle to pinpoint initiatives that drive productivity long-term, leaving investment stranded and impact unrealised.

With productivity stagnant for over 25 years and the working population in decline, how will you identify the AI use-cases that deliver lasting impact?

#1 Delivering Invisible Value

“The highest performing organizations stand out for thinking beyond incremental efficiency gains. They treat AI as a catalyst to transform their organisations, redesigning workflows, and accelerating innovation.”

McKinsey 2025

FROM INDIVIDUAL PRODUCTIVITY GAINS TO UNRECOGNISED ORGANISATIONAL IMPACT

The number of Italian businesses using Artificial Intelligence doubled between 2024 and 2025, according to national statistics agency ISTAT. Large companies employing 250 people or more were the most enthusiastic adopters, and by the end of last year, 53% of organisations in this category were using AI compared with 32% in 2024.

As our panel discussed, companies have already harnessed the capabilities of AI to accelerate processes and deliver efficiency gains. However, the available technologies are often applied to specific tasks, with success being measured mainly in terms of cost reduction. Only a minority of leaders are thinking about how AI can fundamentally transform working practices and drive greater productivity across their organisations.

#1 Delivering Invisible Value

AI USE CASES

ISTAT's research suggests that the most common use cases for AI are data extraction, text and image generation and text-to-speech applications. Our panel's experience suggests the available technologies are supporting activities such as documentation and analysis. Increasingly, AI is also being deployed to support and enhance decision-making.

"I'm changing the way I work myself... I use AI to improve the quality of what I produce."

Carmelo Amoroso, Assurance Director, Technology Cloud Engineering, Oracle

However, the benefits of AI are, for the most part, being delivered at the level of individual employees or small teams, with users taking advantage of a range of tools to boost their own productivity.

#1 Delivering Invisible Value

ADDRESSING ECONOMIC PRESSURES



“We’re using AI to reduce the time frame of transformation initiatives.”

Roundtable Executive

However, there is also huge potential for AI to help companies address the double challenge of sluggish economic growth across Italy’s economy and shortages of skilled labour. For instance, our panel discussed the impact of AI on functions that require large volumes of information to be processed. By using tools that reduce the time taken to process the data, businesses can increase capacity without having to employ more staff.

The consequent improvement in productivity is helping to mitigate economic pressures and skilled labour shortages.

#1 Delivering Invisible Value

BEYOND COST SAVINGS

“The question is: are organisations using AI to save money, or to improve quality?”

Carmelo Amoroso, Assurance Director, Technology Cloud Engineering, Oracle

All this is clearly positive, but there is a danger that businesses will focus on a narrow set of metrics that assess the success of AI projects mainly on the basis of cost reduction.

This approach may disguise some of the value that is being created. An AI initiative can deliver benefits on a number of fronts. For instance, by automating processes, companies can create efficiencies while also reducing the amount of errors that occur when data is being put through systems manually by hard-pressed employees. Equally important, when combined with analytics tools and the capture of comprehensive data sets, AI can markedly improve the quality of decision-making.

Unless the total value of an AI deployment is assessed, companies may find it difficult to justify further investment, so it's important that comprehensive measures are put in place.

“AI rarely generates value in isolation. It is usually introduced alongside initiatives to improve data quality, reorganise teams or optimise operations, making it difficult to attribute the benefits precisely to AI alone.”

Deloitte, 2025

#2 The Approach Determines Outcome

WHY BUSINESS-LED ADOPTION SUCCEEDS AND AI-LED STRATEGIES STALL

Business leaders face huge pressures to adopt AI to either secure a competitive advantage or to avoid falling behind competitors. In Italy, as elsewhere in the world, companies understand the importance of the new technology. The challenge now is to forge strategies that will deliver the greatest benefits.

And as our panel discussed, there are two fundamentally different approaches to AI adoption. Some businesses look at the available tools and run experiments or pilots to see what they can achieve. This is often characterised as the “technology-first” approach. Other businesses start with a business problem and consider how it can be addressed by AI. The evidence to date suggests that organisations adopting the “business-first” strategy are most likely to log measurable gains.

“Most organizations have not embedded AI deeply enough into their workflows and processes to realize material, enterprise-level benefits.”

McKinsey & Company, 2025

#2 The Approach Determines Outcome

DEFINING OUTCOMES

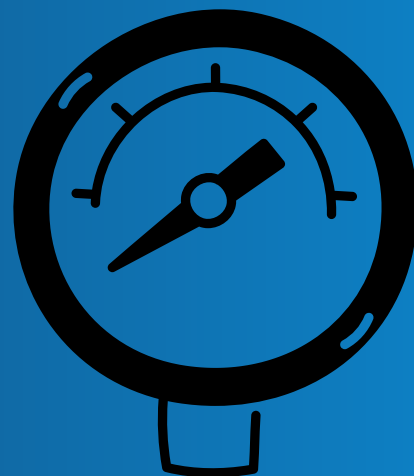
The case for a business or problem-first approach to AI adoption was put simply by Forbes in a 2025 article. “Transformation should never begin with a product pitch, it should begin with a pain point.”

And there is a growing consensus that business leaders should identify high-friction areas within their organisations and use these as the starting point for AI-driven transformation. These problem areas could include sections of workflow where time is wasted or error rates are high. Alternatively, a company could identify a requirement to improve the customer experience and, in doing so, build loyalty and retention.

Businesses that start with a problem or a clearly identified opportunity are best placed to define their desired outcomes. This makes it much easier to demonstrate value, paving the way for future investment.

“Some companies start from a business problem and try to understand how AI can solve it.”

Luigi Vassallo, Chief Technology Officer, Sara Assicurazioni

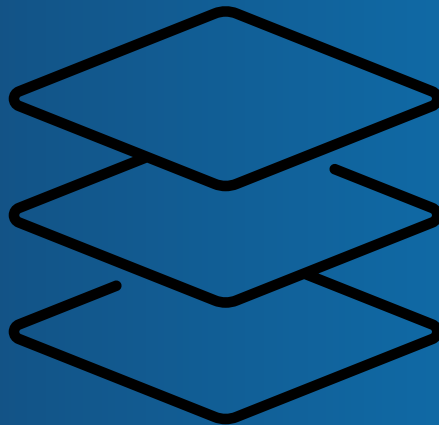


#2 The Approach Determines Outcome

REDESIGNING WORKFLOWS

Much of the early experimentation with AI has involved tools being inserted into existing processes, and while this can deliver some benefits to individuals within a team, the positive impact can be difficult to measure or scale. Indeed, in many cases, simply layering AI onto a legacy system increases complexity without any marked improvement in outcomes.

A better approach is to spend time redesigning working practices to take full advantage of the capabilities that AI offers. When processes are structured around the technology, meaningful improvements in speed and quality of output become much more achievable. Equally important, a systematic and strategic approach opens up a path to future scaling.



“Others start from AI itself. They want an AI strategy, but don’t know how it connects to business processes.”

Luigi Vassallo, Chief Technology Officer, Sara Assicurazioni

#2 The Approach Determines Outcome

THE IMPORTANCE OF LEADERSHIP

According to [Boston Consulting Group](#) research (2025), three-quarters of CEOs say they are their organisation's main decision maker on AI. As the report points out, this reflects a recognition that AI is more than a technology. Its deployment heralds a transformational opportunity to change working practices.

So, the active role of CEOs is not surprising. An AI deployment will affect operations, culture, risk and talent management. It's the CEO, along with other senior executives, who are best placed to understand how these threads can be pulled together. The CEO's role is also crucial to ensuring that the whole organisation is aligned behind the AI strategy.

Our panel discussed how leadership decisions shape the adoption of AI within an organisation. To adopt a business-first approach, leaders must not only identify the pain points within their organisations but also develop a comprehensive understanding of AI's capabilities and how these can be linked to desired outcomes. The need to define AI strategy is changing the role of leadership.

“The energy, curiosity, and commitment shown by leadership from the top down shapes change; mindset and culture determine whether transformation succeeds.”

Sarah Walker, CEO, Cisco UK&I

“Most organizations want to begin with technology or models. Front-runners start differently. They begin by selecting one or two high-impact business outcomes, and assess whether their data foundation can support those goals.”

Accenture, 2025

#3 Why AI Doesn't Scale

ORGANISATIONAL STRUCTURE, NOT TECHNOLOGY, IS THE CONSTRAINT

“Organizations with strong data strategies are nearly three times more likely to generate enterprise-level value.”

Accenture, 2025

In a 2024 report, Boston Consulting Group noted that most of the hurdles (70%) impairing the progress of AI strategies related to people and processes, with only 20% attributable to technology problems. AI technology itself accounted for just 10% of reported problems.

This finding was reflected in our panel discussion. Even when pilots demonstrate value, organisations often struggle to scale their initiatives. The impediments include structural challenges, governance gaps, siloed operations and difficulty in measuring impact.

#3 Why AI Doesn't Scale

GOVERNANCE IS CRUCIAL



“Governance can be a catalyst for growth if designed and implemented as part of an industrialized process, and not an after thought”



*Vincenzo Resta, Regional Sales Director,
Backbase, Director, Strategic Sales, ModelOP*

Moves to translate a successful pilot project into a scalable, company-wide initiative are likely to run aground unless the necessary governance framework is put in place.

For instance, AI transformation projects inevitably introduce new risks into the organisation. Systemic bias can undermine customer trust. Extensive use of data may result in information leaks or data privacy law violations. Thus, guardrails must be in place to prevent this from happening.

Equally important, good governance - combined with a clear strategic vision - is essential to ensure that major projects do not become bogged down by structural problems, such as data being stored in silos or the constant reinvention of the wheel that can occur when AI pilots are being managed independently across the organisation.

As the World Economic Forum pointed out in a 2025 article on AI, governance ensures trust, clarity and accountability and is critical to sustained growth.

#3 Why AI Doesn't Scale

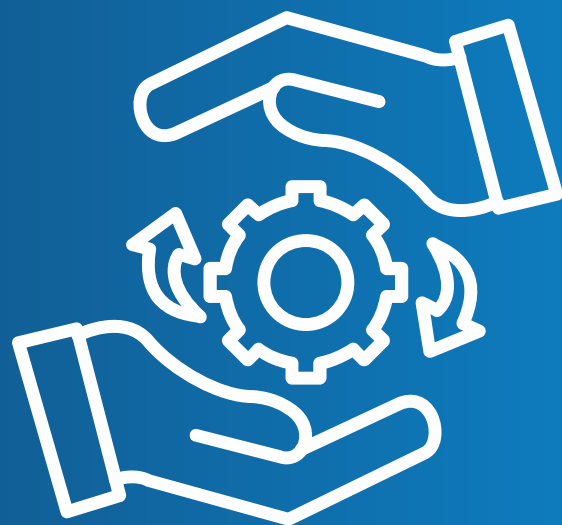
THINKING LONG TERM

It's not always easy to fully identify the contribution made by an IT investment. Some benefits are easily measurable. For instance, if AI-driven automation tools cut the amount of time spent processing customer data, the business can apply appropriate metrics to capture cost savings or efficiency gains. However, there may be benefits that are either less tangible or that only become apparent over the longer-term. For instance, a faster, more responsive service may also improve the customer experience and consequently improve loyalty and retention. However, that will play out over a longer time span.

Consequently, capturing ROI can be challenging, especially if short-term performance improvements are prioritised.

"It's not easy to understand the real value and evaluate the impact of AI."

Marco Latini, Managing Director, Alfa Group



#3 Why AI Doesn't Scale

THE LOW-GROWTH CHALLENGE

The tendency to focus on short-term results may be particularly acute at present. Faced with significant economic headwinds, many companies are under pressure to deliver immediate bottom-line improvements, rather than planning for the longer term.

This limits their scope to take full advantage of AI. To scale successfully, companies will typically have to invest in infrastructure and governance.

“If we invest in AI, we may not see revenue this year, that’s the trade-off.”

Simone Tuosto, Director, Integrated Payment Acceleration Program, Nexi Group

There are also labour issues to address. In 2025, BCG reported that a shortage of skills was one of the main blocks to extensive AI deployment in Italy. Meanwhile only a minority (36%) of employees feel they have received adequate training.

Without investment and a clear road map to ROI, companies may miss the opportunity to rethink how work is done.

“Moving from pilot to production is arguably the most important step in capturing AI value, yet this is where many companies stall.”

Deloitte, 2025

Conclusion



AI is delivering value across Italian organisations, with more than 50% of large companies using the available tools and technologies. Companies are also reporting benefits, including more efficient processes, higher quality outputs and enhanced decision making. However, as things stand, many businesses are failing to comprehensively measure the value of their AI projects, and in most cases, initiatives that have proved themselves in isolated functions are not being scaled.

There are two distinct approaches to AI adoption. The first is to buy the tools and experiment with use cases. However, the second and most effective approach is to first identify business problems or opportunities and then assess how these can be addressed by AI. The evidence is that companies adopting the business-first approach are better able to scale their AI and measure the results.

To scale successfully, businesses must address organisational challenges. These include the necessity of putting a robust governance framework in place. It is also essential to ensure that functions and divisions within the business fully understand and are aligned with the AI strategy. AI provides an opportunity for businesses to deliver higher-quality services. At a time of slow growth and skills shortages, it will play an important role in securing productivity gains.

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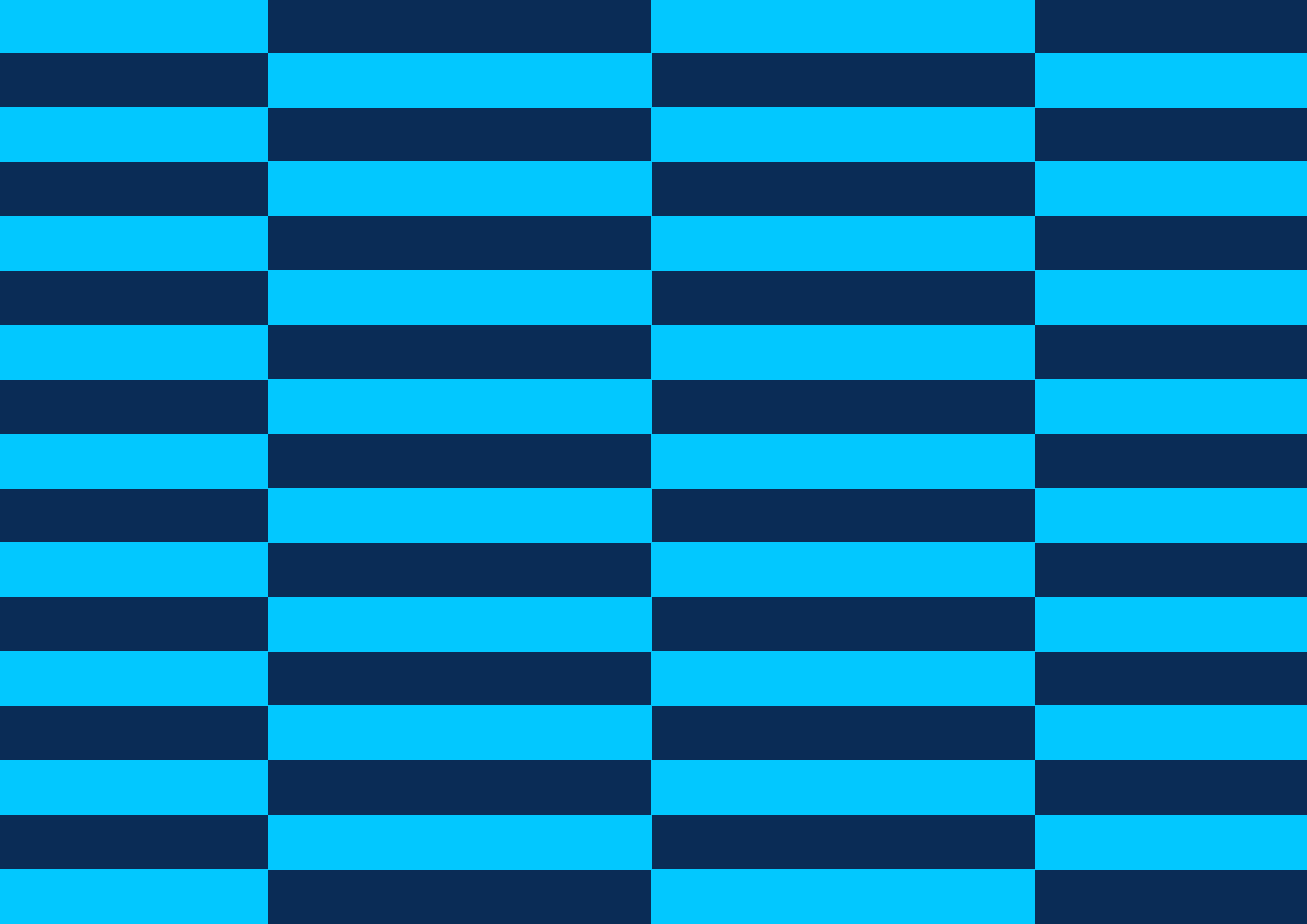


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