

Future of autonomous operations study

How organisations are navigating the path to autonomy



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Foreword



Akhilesh Tiwari

President and Global Head, Autonomous Business Operations, TCS

The reality of scaling autonomous operations

The promise of AI to transform business operations is clear. Today, organisations across industries embed AI into critical processes and invest heavily in modernising their operations. Yet, as AI capabilities advance, we face a much more complex challenge: What does it take to move beyond individual use cases to build truly intelligent, adaptive, and increasingly autonomous operations?

To understand this pivotal moment, TCS conducted a global study of senior leaders across industries. The findings reveal a striking gap between ambition and practical realities. While autonomous operations are firmly on the strategic agenda, 78% of organisations describe themselves as operating at a level where AI primarily augments human decision-making. More than three-quarters expect 30% or less of their operations to reach true autonomy over the next one to two years.

This research suggests that the path forward is increasingly shaped by operating models, governance, and organizational readiness rather than technology alone. Today's business outcomes depend on decisions and actions that span functions, data domains, and systems. To scale AI, we must adopt new approaches to decision-making, governance, accountability, and Human + AI collaboration for greater autonomy.



Ashok Pai

Senior Vice President and Global Head, Enterprise Cognitive Business Operations, TCS

Building the framework for AI at scale

The insights that follow offer a clear view of where enterprises stand, but more importantly, they highlight the specific factors shaping progress toward autonomous operations. Looking to the future, the real enablers won't be algorithms, but the key structural foundations that allow AI to operate safely, ethically, and effectively at scale.

While business leaders still focus on optimising costs and efficiency, they consistently ranked factors like a unified view of data across operations, a responsible and ethical use of AI embedded by design, and strong observability and governance frameworks as being their most critical enablers. These are the practical pillars of change.

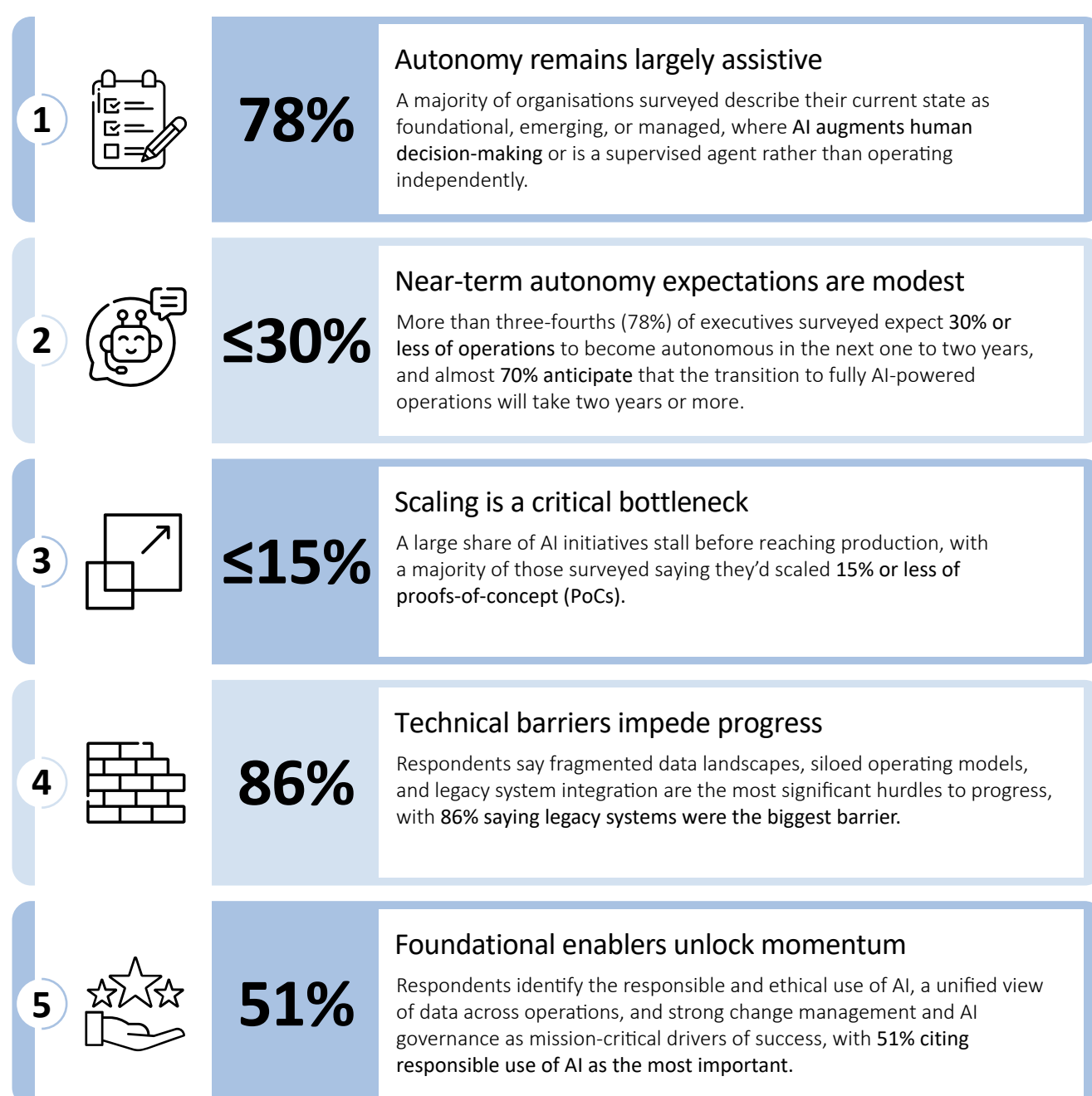
These findings also highlight steps organisations can take to move beyond isolated AI pilots and build more adaptive, outcome-driven ways of operating. We invite you to explore these findings to navigate the journey with greater clarity and confidence.

Executive summary

This report, based on a survey of more than 300 global senior executives responsible for shaping the future of operations across organisations in the United States, the United Kingdom, France, Germany, and Australia (with an annual revenue of \$5 billion or more) reveals a clear vision for an autonomous future anchored to efficiency and growth. At the same time, it underscores the reality of scaling initiatives across complex enterprise environments.

Our research identifies five key findings from survey respondents:

Key findings



The mandate: Balancing revenue growth and efficiency

Organisations are pursuing AI-powered operations with two clear ambitions: unlocking new sources of growth and reducing costs through improved efficiency. While these priorities remain strikingly consistent across industries and geographies, their relative emphasis varies. Cost optimisation is the most common objective, reflecting its importance as a foundational business imperative. However, when executives identify their single highest priority, revenue growth comes out on top. Organisations increasingly view AI as both an efficiency engine and a growth catalyst, placing revenue growth at the centre of their ambitions.

Top 3 objectives for AI-powered operations

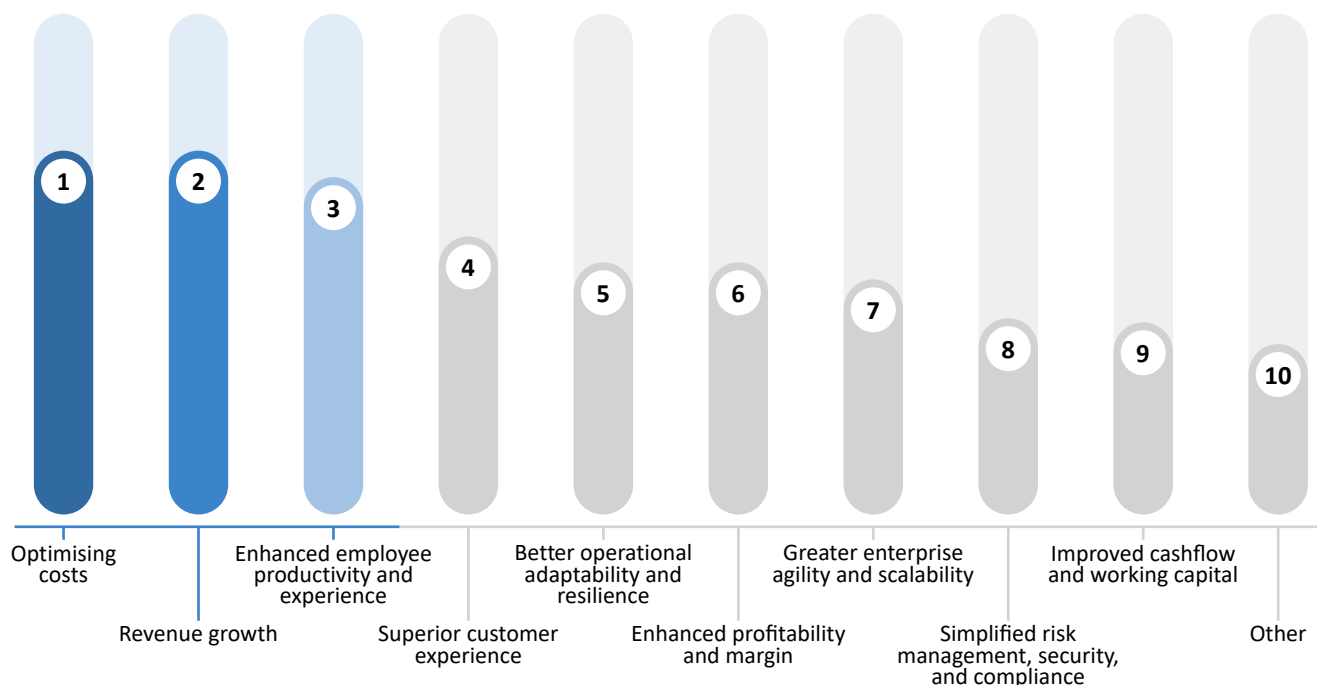


Figure 1: What are the top 3 primary objectives your organisation aspires to achieve from AI-powered operations? n=303

Industry, region, and role insights

Where growth takes the lead

Although cost optimisation ranks first overall, revenue growth rises to the top among the US and Australia respondents and among CFOs, COOs, and supply chain leaders. For these groups, AI is viewed not simply as a tool for efficiency, but as a catalyst for new value creation, business opportunities, and competitive advantage.

Notably, among the industries meeting the reporting threshold ($n \geq 35$), none ranked growth as their top outcome. Instead, they tended to prioritise operational outcomes, with cost optimisation leading in banking, financial services, and insurance (BFSI) and manufacturing, and productivity ranking as high as costs for technology firms. This suggests that the strongest momentum behind AI-driven growth is coming from business leaders rather than the standalone industry segments analysed in this study.

Additional survey findings reinforce this balancing act. Nearly six in ten respondents (59%) expect AI transformation to deliver greater operational efficiency through cost reduction, productivity gains, and faster responsiveness (see figure 2). But organisations are not focused solely on doing today's work better. Data-driven decision-making and business agility, including the ability to bring new products to market faster, ranked as the next most important benefit. Together, these results suggest that organisations are looking to AI both to strengthen current operations and to build the capabilities needed for more autonomous, adaptive ways of working.

Expected benefits of AI-powered operations

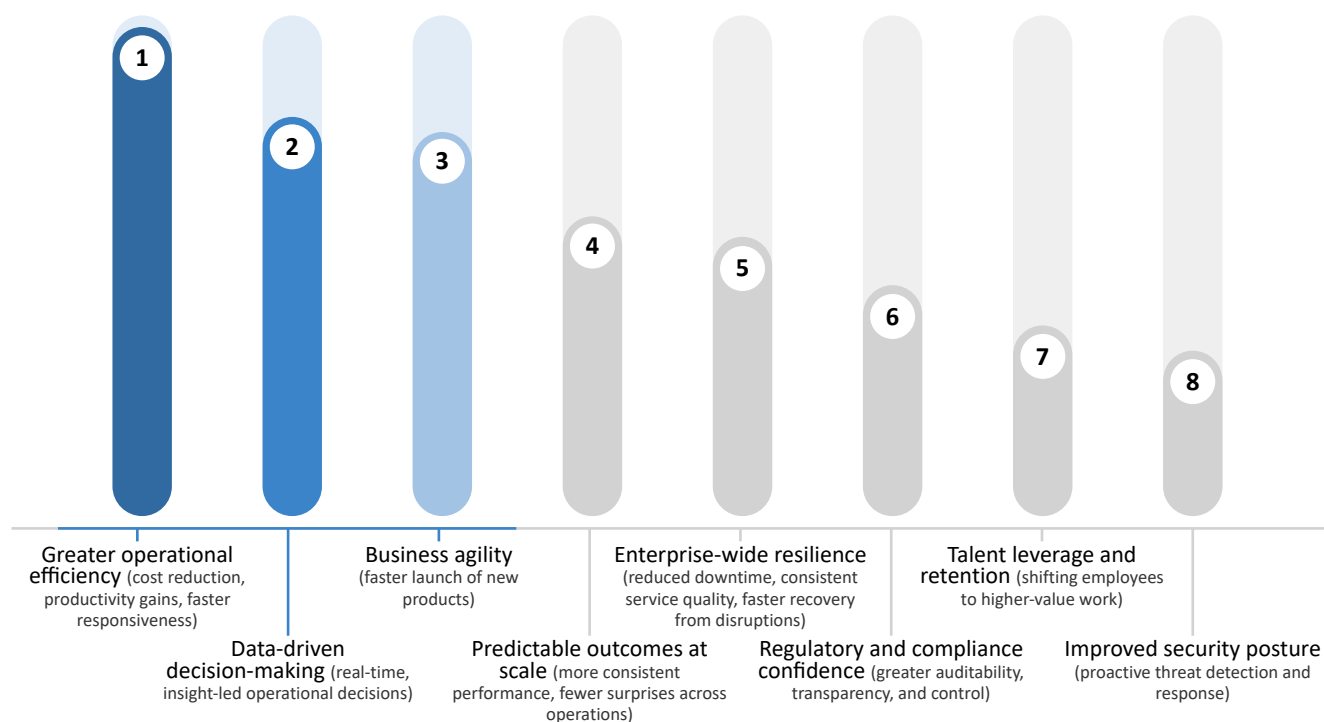
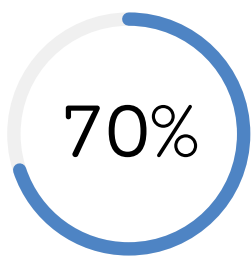


Figure 2: What benefits do you primarily expect to see with AI-powered operations? n=303

Industry, region, and role insights

A shared definition of AI's benefits

One finding stands out for its consistency: Organisations largely agree on what they expect AI-powered operations to deliver. Greater operational efficiency ranks first across nearly all major segments, with data-driven decision-making and business agility close behind. The only notable exceptions are manufacturing and US respondents, where business agility edges ahead of data-driven decision-making, reflecting a heightened focus on speed and responsiveness. Even so, the same three benefits dominate across the board, suggesting that organisations share a common vision of AI success: running more efficiently today while building the agility and intelligence needed to compete tomorrow.



AI agents forge efficiency by slashing supplier onboarding time by up to 70%

A leading steel manufacturer needed to onboard suppliers in a timely manner, a daunting challenge due to the intensive, largely manual work in collecting multiple documents, validating them, and performing financial/risk assessments. By orchestrating a set of AI agents to enable autonomous supplier onboarding, they were able to reduce cycle time from 23 days to 7 days.

The same pattern emerges when organisations define success in AI-powered operations. Improvements in cost, productivity, and efficiency rank highest, but business outcomes, such as revenue growth, faster cycle times, and accelerated time to market follow close behind (see figure 3).

Respondents' ranking of the measures defining success in AI-powered operations

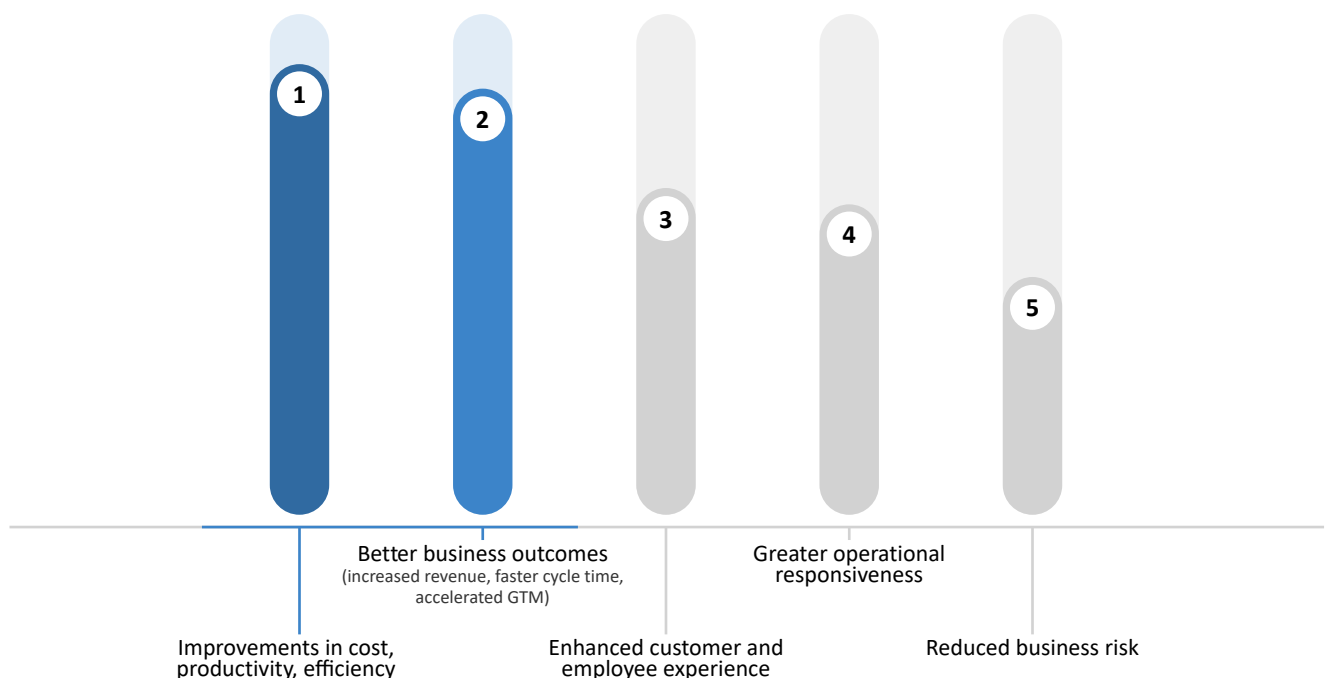


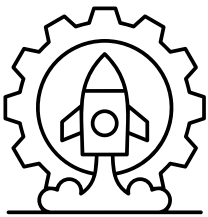
Figure 3: How do you measure success of AI-powered operations transformation? n=303

These findings suggest that organisations are aiming for autonomous outcomes, even as they focus their near-term efforts on operational improvement. In truly autonomous operating models, success is measured by decision velocity, market responsiveness, dynamic resource allocation, and the ability to create new sources of value. But autonomy cannot be built on unstable foundations. Before organisations can hand off decisions to AI, they need confidence in the underlying processes, data, and controls that support them. What may appear as caution is often a deliberate effort to establish the operational discipline required to scale autonomy responsibly.

Industry, region, and role insights

Agreement at the top before paths diverge

While respondents largely agree on the two most important measures of AI success, subtle differences emerge beyond the top tier. Across most industries, geographies, and functions that met the reporting threshold, improvements in cost, productivity, and efficiency and better business outcomes occupy the top two positions. However, organisations diverge on what comes next. Manufacturing leaders, US respondents, and operational executives such as CFOs and COOs place greater emphasis on responsiveness and agility, while others prioritise customer and employee experience. Notably, respondents in the UK, Australia, and the technology sector place business outcomes ahead of efficiency altogether, signalling a stronger focus on AI's ability to drive growth and business impact.



AI-reimagined aerospace approach delivers \$500M in value

A global aerospace leader delivered proof of AI-led success by consolidating fragmented global processes into an AI-enabled, integrated services model within a highly complex environment. The new direction delivered over \$500M in total business value, which included \$325M in direct hard-cost savings. The business has benefited from transformed operations that provide a scalable engine for growth, unlocking real-time insights that drive decision-making, improve efficiency, and provide industry agility.



Where leaders see the greatest opportunity for AI transformation

While respondents broadly agree on the strategic objectives and potential benefits of AI-powered operations, opportunities for transformation are not distributed evenly across the enterprise. To better understand where organisations expect AI to deliver the greatest impact, we examined responses from two roles with significant responsibility for enterprise performance: chief financial officers and chief supply chain/procurement officers. Together, their perspectives offer a view into where leaders see the greatest potential to improve decisions, optimise operations, and create business value through AI.

For CFOs, the greatest opportunities for AI transformation lie in areas where better intelligence can improve planning, forecasting, and financial performance. Financial planning and analysis ranks first, followed by procure-to-pay, order-to-cash, record-to-report, and tax, treasury, and risk management (see figure 4).

Chief financial officers' perspectives on operational areas offering the best potential for AI-powered transformation

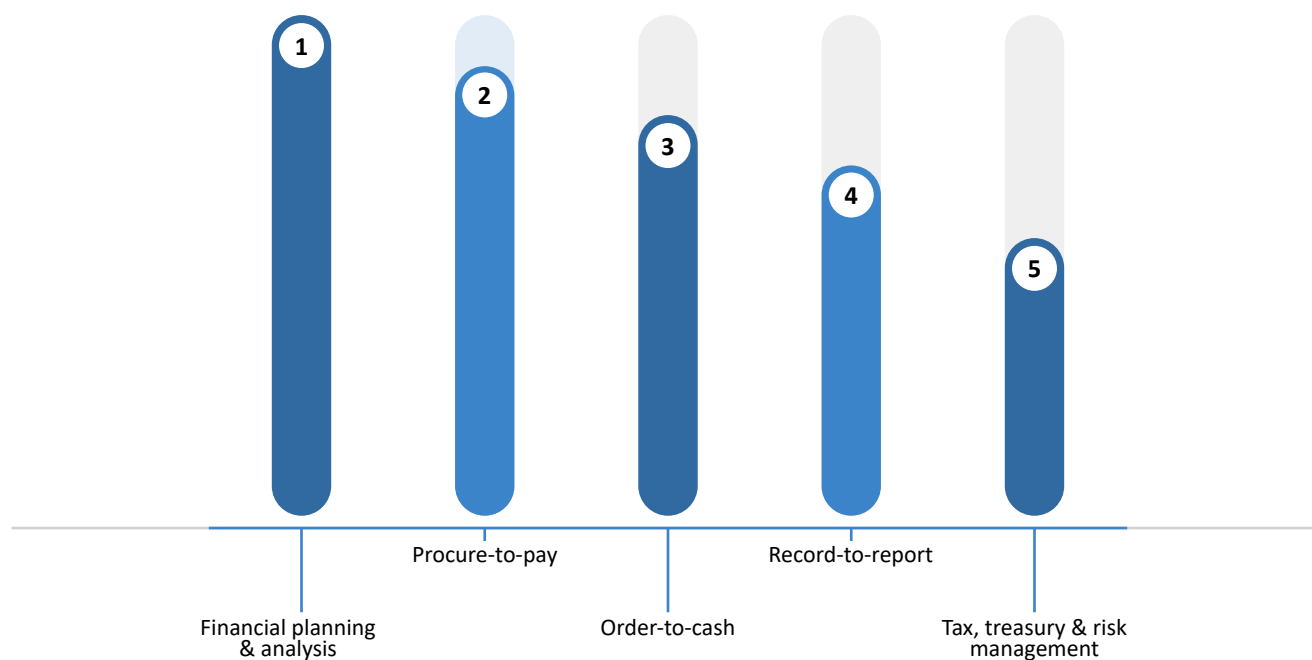
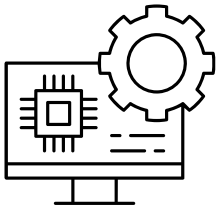


Figure 4: Which operational areas offer the greatest potential for AI-powered transformation? n=60

The rankings suggest that finance leaders view AI as an enabler of both operational efficiency and decision quality. While many AI use cases focus on automating routine work, CFOs appear most interested in strengthening the functions that shape how capital is allocated, how risk is managed, and how performance is monitored. Notably, three of the top four priorities span multiple business functions rather than sitting solely within finance, indicating that AI's potential is increasingly tied to improving end-to-end processes and enterprise-wide decision-making.



AI-driven finance operations secure millions in business value

By transitioning fragmented processes to an AI-enabled, integrated operating model across procure-to-pay and record-to-report cycles, a leading global home improvement retailer significantly reduced operational inefficiencies and improved issue resolution. The transformation helped the organisation realize \$144M in additional business value.

By contrast, supply chain and procurement leaders prioritise operational areas where complexity, uncertainty, and coordination challenges have the greatest impact on business performance. Supply chain planning and forecasting ranks first, followed by logistics and distribution, procurement and sourcing, order-to-cash or fulfilment, manufacturing operations, and aftermarket services (see figure 5).

Chief supply chain/chief procurement officers' perspectives on operational areas offering the best potential for AI-powered transformation

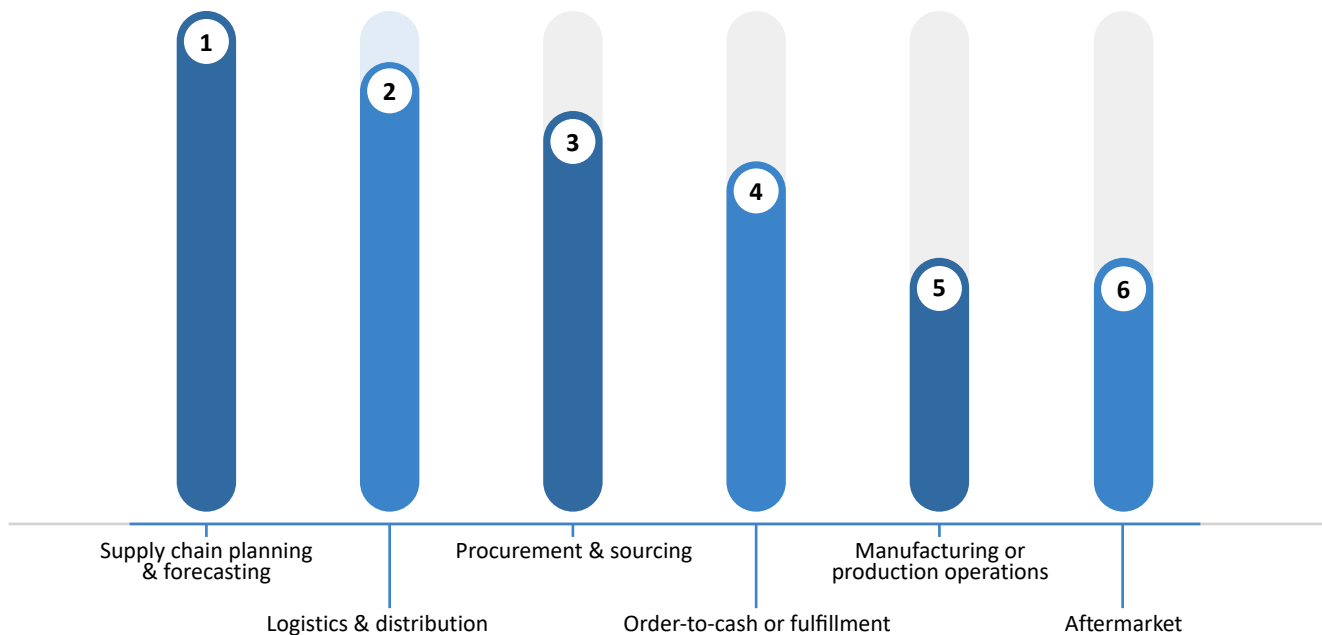


Figure 5: Which operational areas offer the greatest potential for AI-powered transformation? n=52

These priorities reflect a strong emphasis on anticipating change and responding effectively to disruption. Planning, logistics, sourcing, and fulfilment represent some of the most interconnected processes in the enterprise, requiring continuous coordination across suppliers, partners, inventory networks, customers, and internal operations. Rather than focusing narrowly on automation, supply chain leaders appear to view AI as a way to improve visibility, forecasting accuracy, responsiveness, and operational resilience across increasingly dynamic value chains.

Taken together, the finance and supply chain perspectives show that the greatest opportunities for AI transformation sit in areas where decisions are complex, data is distributed, and outcomes depend on coordination across functions. Finance leaders emphasise better planning, performance management, and financial execution, while supply chain and procurement leaders focus on visibility, resilience, and responsiveness across value chains. These priorities underscore that AI-powered operations create value when intelligence is embedded into the processes that shape enterprise performance. Yet, as the next section shows, most organisations are still building the foundations needed to scale that ambition.

Where organisations are today: The road to building the foundation for an intelligent future

The race toward autonomy may be accelerating, but most enterprises are still laying the groundwork. Despite great anticipation for fast-moving outcomes, many organisations are still in the early stages of their autonomous journey and are taking an incremental approach.

When asked about their AI implementation timeline, more than two-thirds of respondents (68%) indicated they would need two to three years or more to transition to autonomous operations, with an additional 23% saying they had yet to plan. Only 8% anticipated their plans would take less than two years to implement (see figure 6).

3.7x

Executives who foresee fully AI-powered operations in the next two to three years are 3.7 times more likely to say AI already executes their operational processes and humans orchestrate that work.

Anticipated AI implementation timeline

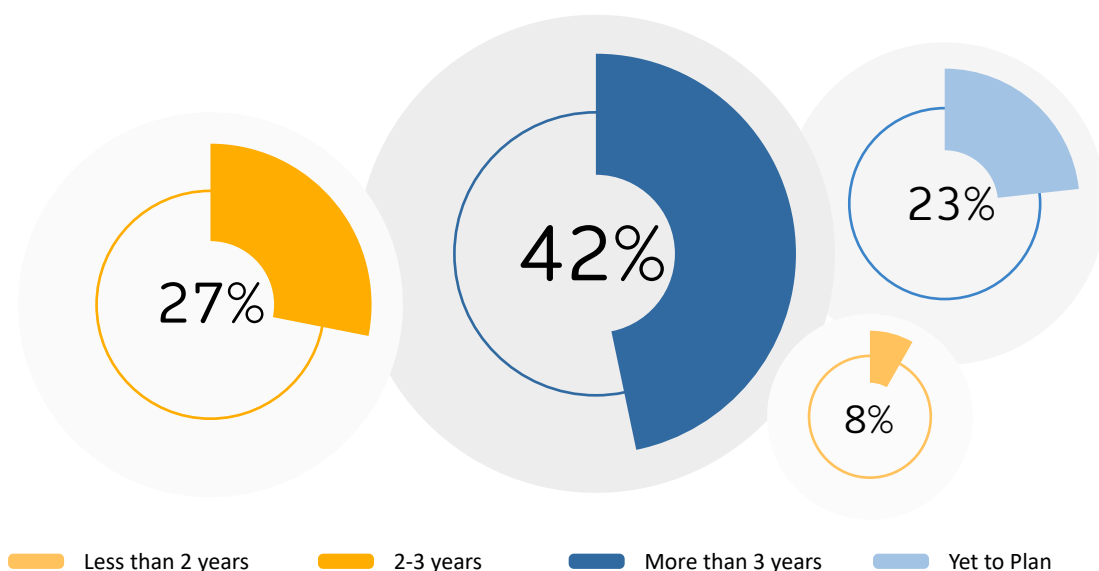


Figure 6: What is the implementation timeline for your organisation to transition to fully AI-powered operations? n=303

Industry, region, and role insights

The roadmap is still taking shape

The push toward autonomous operations is gaining momentum, but implementation timelines remain long for most organisations. Technology companies stand out as the most forward-leaning segment, with **24% expecting to transition in less than two years**, compared with 5% of **BFSI and manufacturing organisations**. US respondents also appear further along the planning curve, with **84% reporting a defined timeline** and **11% expecting implementation within two years**. In contrast, planning gaps remain significant in several segments, including **Australia, where 38% have yet to plan**, and **the BFSI sector, where 77% either expect the transition to take more than three years or have yet to begin planning**.

And the overall data reveals a significant gap between the anticipation of a fully autonomous future and the current state of operations. A striking 78% of companies are still in “assistance” modes, where AI either is a tool, provides basic support to humans, or acts as a supervised agent. Only 22% of companies say they have reached advanced or transformational stages where AI operates with autonomy (see figure 7).

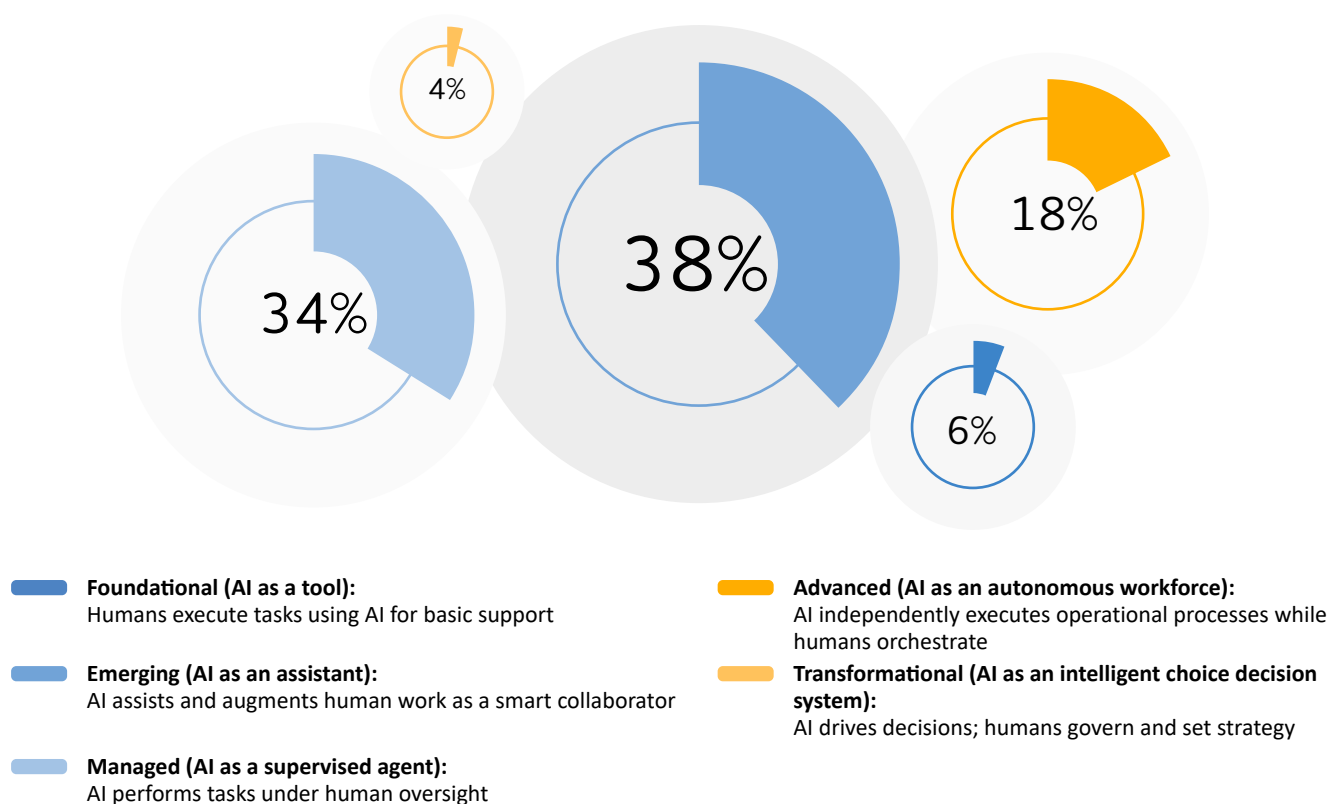


Figure 7: What is the current state of AI in operations in your organisation? n=303

What separates the organisations advancing toward autonomy?

To better understand what distinguishes organisations making the greatest progress toward autonomy, we compared the **15%** of respondents that have reached Advanced or Transformational levels of AI maturity and have successfully transitioned more than 20% of AI-led operations PoCs into production ("**Pacesetters**") with the **85%** of organisations either operating at Foundational, Emerging, or Managed levels, or who have transitioned 20% or less of AI-led operations PoCs into production ("**Followers**"). The differences reveal how maturity shapes priorities, expectations, and the pace at which organisations believe autonomous operations can scale. What emerges is not simply a gap in adoption, but a different mindset about how AI creates value and how quickly autonomy can be achieved.

Insight 1: Pacesetters focus on business outcomes, Followers focus on efficiency

Pacesetters and Followers measure AI success differently. Among Pacesetters, **better business outcomes** (revenue growth, faster cycle times, and accelerated time to market) **rank as the top measure of success**, ahead of improvements in cost, productivity, and efficiency. Followers reverse those priorities, placing efficiency first and business outcomes second. The shift suggests that as organisations gain experience with AI-powered operations, attention increasingly turns from operational optimisation toward growth, business impact, and enterprise value creation.

Insight 2: Pacesetters expect autonomy to scale much faster

Pacesetters are considerably more ambitious about the near-term expansion of autonomous operations. Nearly two-thirds (**64%**) expect more than 30% of operations to become autonomous within the next one to two years, including **11%** that expect autonomy to exceed 60% of operations. Among Followers, only **14%** expect autonomy to surpass the 30% threshold.

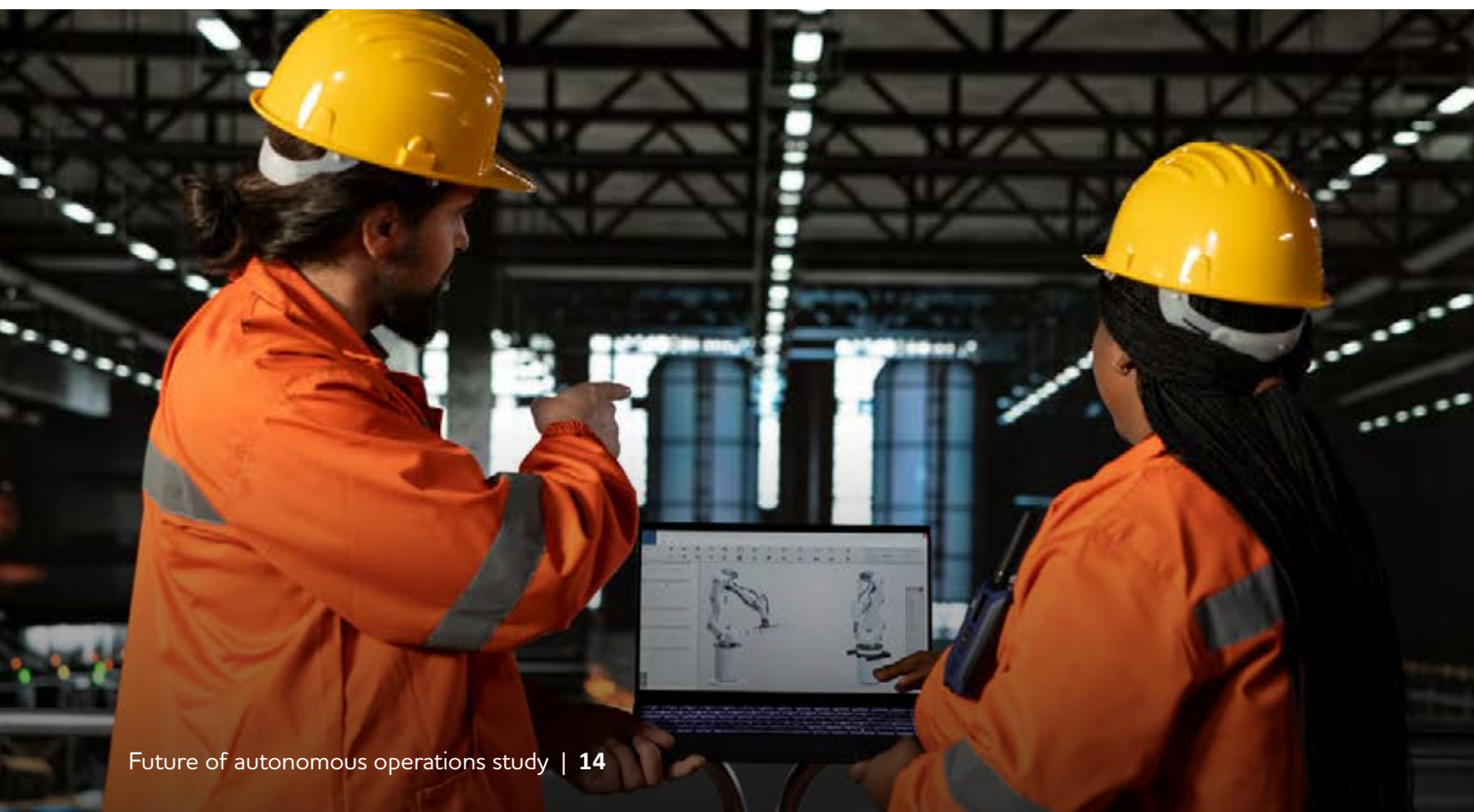


Insight 3: Pacesetters have moved beyond planning

Organisations furthest along in their autonomy journey also have clearer implementation roadmaps. None of the Pacesetter cohort report being "yet to plan," compared with **28% of Followers**. Pacesetters are also more than twice as likely to expect a transition within two years (**18% vs. 7%**) and substantially less likely to anticipate timelines extending beyond three years (**22% vs. 45%**).

This maturity gap adds context to the broader market outlook: While Pacesetters expect faster progress, the overall market remains more measured in its near-term expectations.

Aspect	Pacesetters (Top 15%)	Followers (Remaining 85%)
Primary goal	Business outcomes (growth, GTM)	Efficiency (cost, productivity)
PoC scaling	>20% of PoCs in production	Mostly <20% of PoCs in production
Near-term outlook	64% expect >30% autonomy in 2 years	14% expect >30% autonomy in 2 years
Biggest barrier	Data fragmentation and siloes	Legacy systems and integration
Mindset	AI as a growth and value catalyst	AI as an optimization tool



The cautious advancement toward autonomous operations among the overall data is likely not a lack of vision but a reflection of pragmatism. More than three-fourths of leaders (78%) expect that 30% or less of their operations will become autonomous in the next one to two years, signalling a deliberate, incremental strategy rather than a quick overhaul (see figure 8).

Percentage of operations expected to be autonomous in 1–2 years

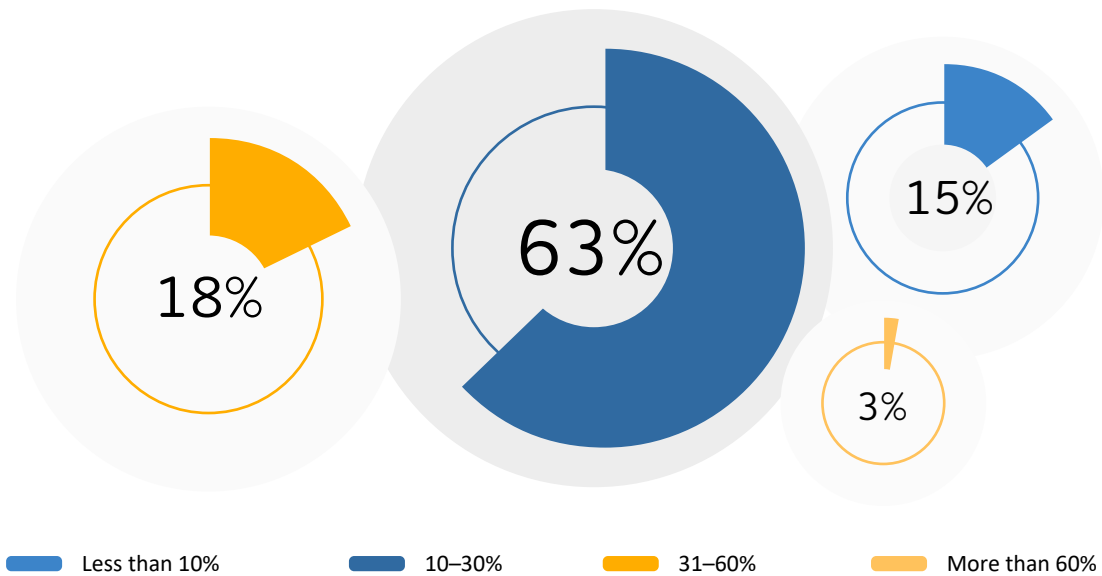


Figure 8: What percentage of operations do you expect to become autonomous in the next 1–2 years? n=303
Note: Percentages are rounded to the nearest whole number and may not total 100%

Industry, region, and role insights

The next phase of autonomy takes shape

The next one to two years are likely to bring measurable progress toward autonomous operations, but not a wholesale transformation. Technology companies show the strongest near-term ambition, with **46% expecting more than 30% of operations to become autonomous**, more than double the overall figure. **US respondents also stand out, with 32% expecting autonomy to surpass the 30% threshold, compared with just 10% of respondents in Germany.** CFOs show similarly elevated expectations, with **32% anticipating broader adoption**, versus **25% of CIOs, CTOs, and CDOs and 13% of COOs.** Meanwhile, **83% of BFSI respondents and 86% of manufacturing respondents** expect autonomy to remain at 30% or less of operations.

The chasm, or why pilots don't scale

Beyond planning and implementation challenges, many organisations face a more fundamental hurdle: scaling AI from experimentation to enterprise-wide impact. While proof-of-concept initiatives continue to proliferate, relatively few make the leap into production. More than half of respondents have scaled 15% or less of their AI PoCs, and only 14% have successfully transitioned more than a quarter (see figure 9). The challenge is no longer proving what AI can do. It is embedding those capabilities into day-to-day operations at scale.

Percentage of AI proofs-of-concept (PoCs) successfully transitioned to production

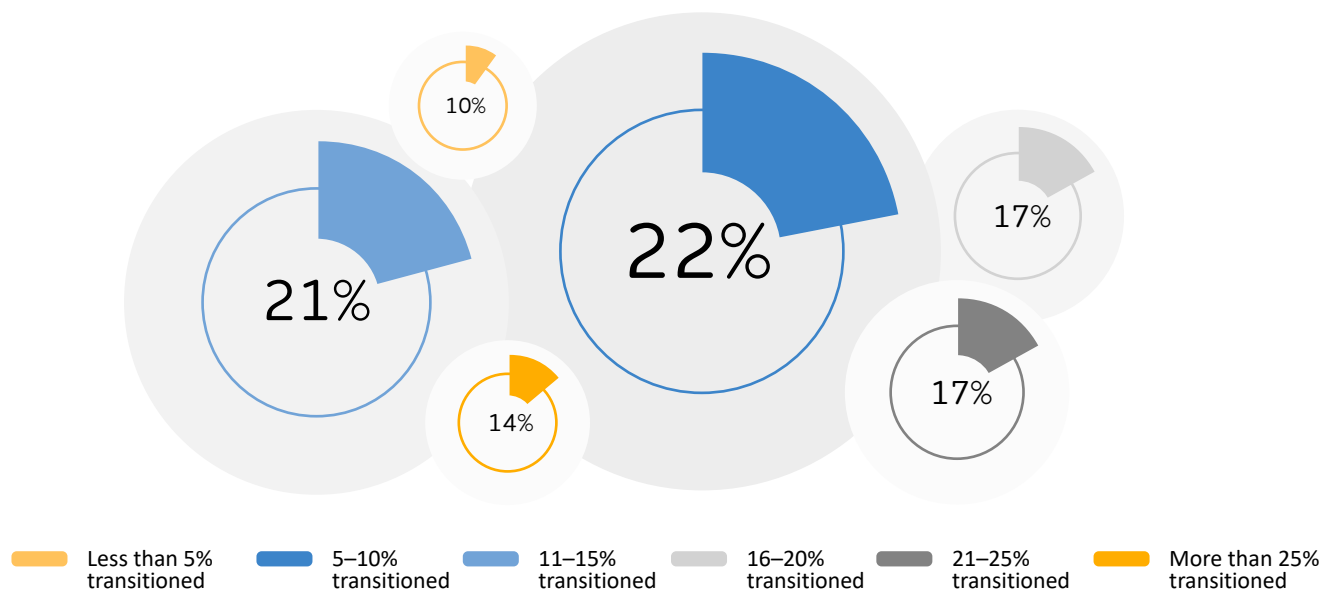


Figure 9: What percentage of AI-led operations proofs of concept (PoCs) have been successfully transitioned to production? n=303
Note: Percentages are rounded to the nearest whole number and may not total 100%

Industry, region, and role insights

Scaling success remains uneven

Most organisations are still struggling to move AI from proof of concept into production, with **53% of respondents having scaled 15% or less of their AI PoCs**, and only **14% having moved more than 25% into production**. Technology companies stand out sharply, with **54% scaling more than 20% of PoCs** and **25% scaling more than a quarter**, nearly double the overall figure. US respondents and CIOs, CTOs, and CDOs are in line with the overall average at **14%**. BFSI, manufacturing, and supply chain leaders remain more concentrated at lower levels of scale, with **65% of BFSI respondents**, **54% of manufacturing respondents**, and **65% of CPOs/CSCOs** scaling 15% or less of their AI PoCs.

The research points to a hard truth: Most enterprises were not built for autonomy. Most organisations are trying to build autonomous capabilities on top of decades of accumulated systems, applications, and data that were never designed to work together. Organisations readily identify these as their top obstacles on the journey to AI-powered operations (see figure 10).

Challenges in the journey toward AI-powered operations

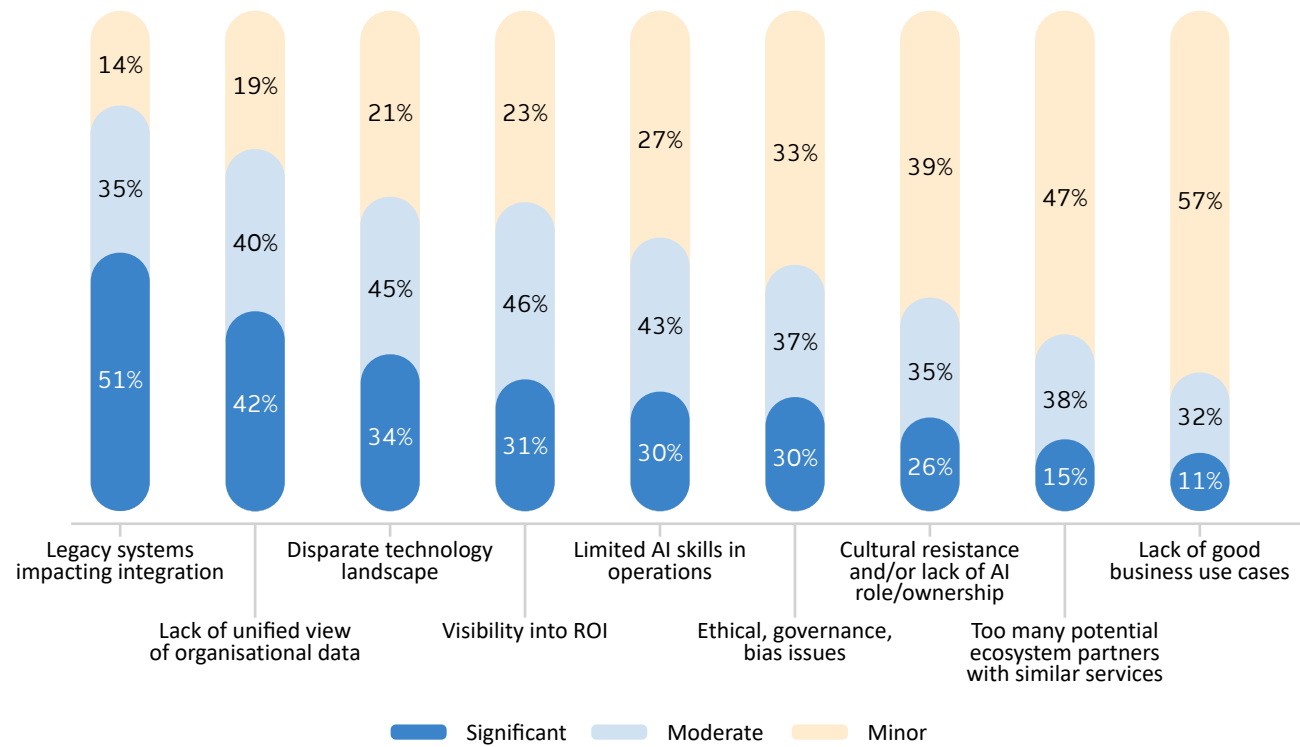


Figure 10: What challenges are you experiencing in your journey toward AI-powered operations? n=303
Note: Percentages are rounded to the nearest whole number and may not total 100%

Legacy systems remain the most significant obstacle, cited by 86% of respondents. While AI pilots can succeed within narrow domains, enterprise-scale autonomy requires information, decisions, and workflows to move seamlessly across functions. For many organisations, core HR, finance, procurement, and operational systems still operate largely in isolation, making that level of coordination difficult.

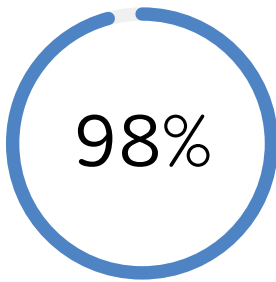
6.8x

When they think legacy systems are a “significant” impact on integrating AI, executives are 6.8 times more likely to name “simplified risk management, security, and compliance” as their top objective for AI-powered operations.

Data fragmentation presents a similar challenge. More than eight in ten respondents (81%) report struggling with disconnected data sources and organisational silos. As AI becomes more autonomous, the quality of its decisions increasingly depends on its ability to draw from consistent, trusted, and enterprise-wide information.

The technology landscape itself adds another layer of complexity. Nearly four-fifths of respondents (79%) cite their patchwork of in-house technologies as a barrier. Years of acquisitions, local optimisation efforts, and incremental investments have created environments where systems coexist but rarely operate as a cohesive whole.

The result is a common pattern across organisations: AI can prove its value in controlled pilots, but scaling those successes often means untangling years of technological and organisational complexity.



Streamlining operational complexity in workforce management cuts onboarding latency by 98%

A leading international security services organisation faced rising workforce demands, fragmented processes, and increasing complexity across different regional systems. They were able to modernise critical workforce systems by transitioning to an autonomous, analytics-driven framework for their HR service delivery model. Hiring lead times were reduced from 24 hours to less than 30 minutes (a 98% reduction) and a 60% adoption rate in employee self services led to a satisfaction increase of 20%.

Industry, region, and role insights

The obstacles vary, but the foundation challenges are consistent

While legacy systems rank as the leading challenge overall, organisations are confronting a broader set of barriers to scaling autonomous operations. Technology companies are the notable exception, ranking a **lack of a unified view of organisational data** as their top challenge. In the United States, executives place **disparate technology landscapes** first, highlighting the complexity of managing fragmented platforms and tools. Elsewhere, leaders point to different constraints. Manufacturing organisations cite both **data fragmentation and difficulty demonstrating ROI**, while Germany elevates **limited AI skills in operations** alongside ROI concerns. Functional perspectives also differ. CFOs and COOs place greater emphasis on **visibility into ROI**, while customer leaders focus on fragmented technology environments and skill gaps.



The enablers propelling organisations forward

The top enablers mirror the top barriers. Executives are increasingly aligned on the capabilities that will determine whether AI remains a collection of successful pilots or becomes a catalyst for autonomous operations. After years spent chasing AI capabilities, organisations increasingly recognize that the constraints on autonomy are organisational rather than technological.

The top enabler, considered mission-critical and cited by 51% of respondents, is the responsible and ethical use of AI. As AI takes on a greater role in decision-making, organisations recognise that trust, transparency, and accountability are not optional safeguards but essential foundations for adoption at scale (see figure 11).

Close behind is a unified view of operational data, underscoring many of the challenges identified earlier in the research. Organisations cannot make autonomous decisions with fragmented information. Until they address legacy systems, disconnected applications, and data silos, creating a consistent, enterprise-wide view of operations will remain difficult.

Change management and AI governance rank third (41%), reflecting the reality that autonomy is as much an organisational challenge as a technological one. New operating models require new skills, new oversight mechanisms, and new ways of working. Organisations that invest in these capabilities are better positioned to move beyond isolated AI initiatives and scale autonomous operations with confidence.

Executives who consider talent transformation a mission-critical enabler for AI-powered operations are **3.2X** more likely to say they're already in the "transformational" stage of AI operations

Critical enablers in achieving AI-powered operations

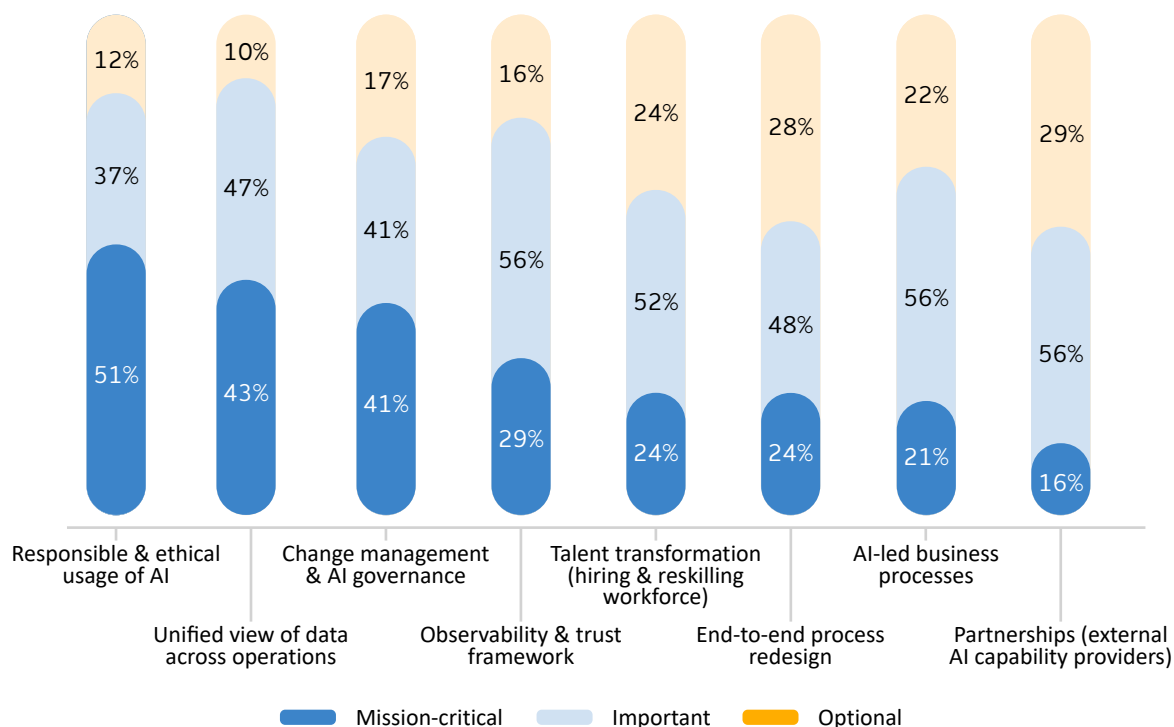


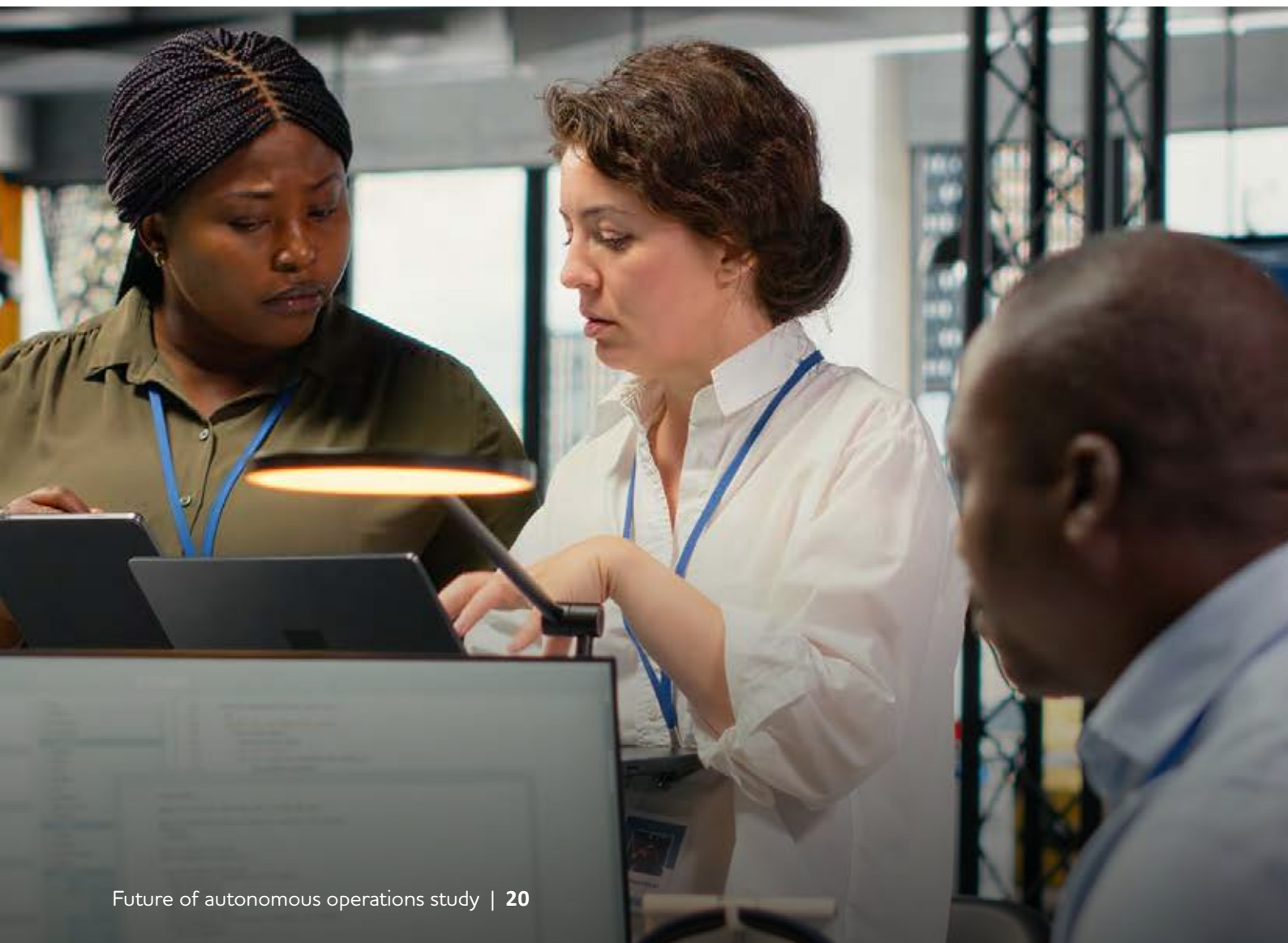
Figure 11: What is the most critical enabler in achieving AI-powered operations? n=303

Note: Percentages are rounded to the nearest whole number and may not total 100%

Industry, region, and role insights

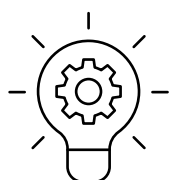
The foundations of scale are becoming clearer

While organisations may differ on where they are in their autonomy journey, they largely agree on what it will take to move forward. Across respondents, three enablers consistently rise to the top: a unified view of operational data, responsible and ethical AI, and observability and trust frameworks. The consistency of these priorities suggests a growing recognition that scaling AI depends as much on trust and data foundations as on technology innovation. Notable differences do emerge. Manufacturing organisations, UK respondents, and French executives place responsible and ethical AI at the top of the list, while CFOs give greater weight to AI-led business processes and Germany and supply chain leaders place more emphasis on change management and governance. Even so, the findings reveal broad agreement that the path to autonomous operations starts with establishing trusted data, trusted AI, and trusted ways of working.



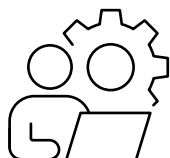
Next steps: Strategic focus areas

The decade ahead will be defined by the shift from AI-assisted work to AI-powered operations. Realising that vision demands a transition from process-led operating models to intelligent systems that can sense, decide, adapt, and optimise continuously, we see several imperatives for organisations seeking to accelerate that journey.



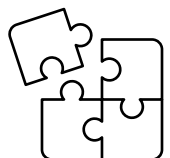
1. Establish an outcome-driven enterprise foundation

Autonomous operations depend on a unified view of the business. Yet many organisations continue to struggle with fragmented processes, disconnected technologies, and siloed data. Organisations need a common intelligence layer that connects operational data, business context, and decision-making across functions. By linking systems, workflows, and value streams, leaders can improve visibility, coordination, and business outcomes across the enterprise.



2. Build the intelligence fabric for autonomy

Once the foundation is connected, the focus shifts to embedding intelligence throughout the enterprise. Infrastructure, data, applications, and enterprise knowledge should work as a coordinated whole. An enterprise knowledge fabric that captures business rules, policies, process logic, and institutional expertise gives AI the context needed to make better decisions and take meaningful action. Combined with decision intelligence and agentic orchestration, it helps organisations become more adaptive, responsive, and outcome driven.



3. Build trust through responsible AI, governance, and observability

Trust remains essential as AI takes on a greater role in operational decision-making. Responsible AI practices, strong governance, and clear human oversight help ensure transparency, accountability, and control. Observability provides visibility into AI-driven workflows, decisions, and outcomes, allowing leaders to monitor performance, explain results, manage risk, and continuously improve how autonomous systems operate. Organisations that establish trust by design will be better positioned to scale AI across mission-critical processes.



4. Prepare the workforce for Human + AI operations

The transition to autonomous operations is as much an organisational shift as a technological one. Employees will increasingly move from executing tasks to orchestrating workflows, supervising AI systems, and applying judgment where it matters most. Success depends on helping people develop new skills, adapt to new ways of working, and build confidence in AI-enabled operations. Through upskilling, change management, and Human + AI collaboration, organisations can strengthen adoption while maximizing the value of both human and machine capabilities.

The shift to autonomous operations is reshaping how work is organised, decisions are made, and outcomes are delivered. The organisations laying the foundations built on data, trust, and Human + AI collaboration will define the next era of enterprise performance, where intelligence is woven into the fabric of operations and autonomy becomes a catalyst for growth, resilience, and innovation.

Demographics

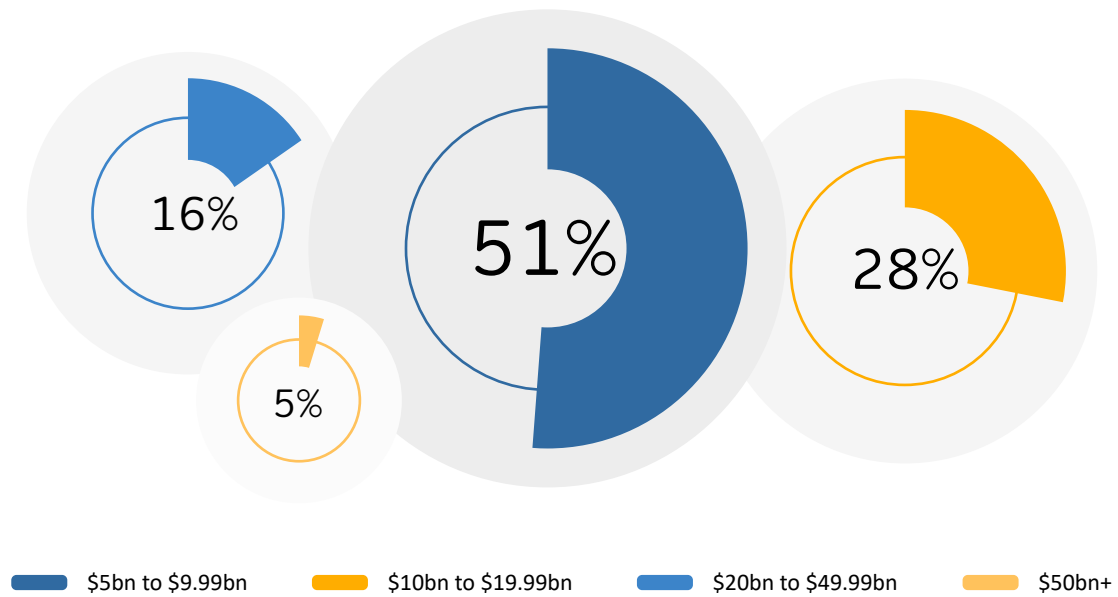


Roles and revenues

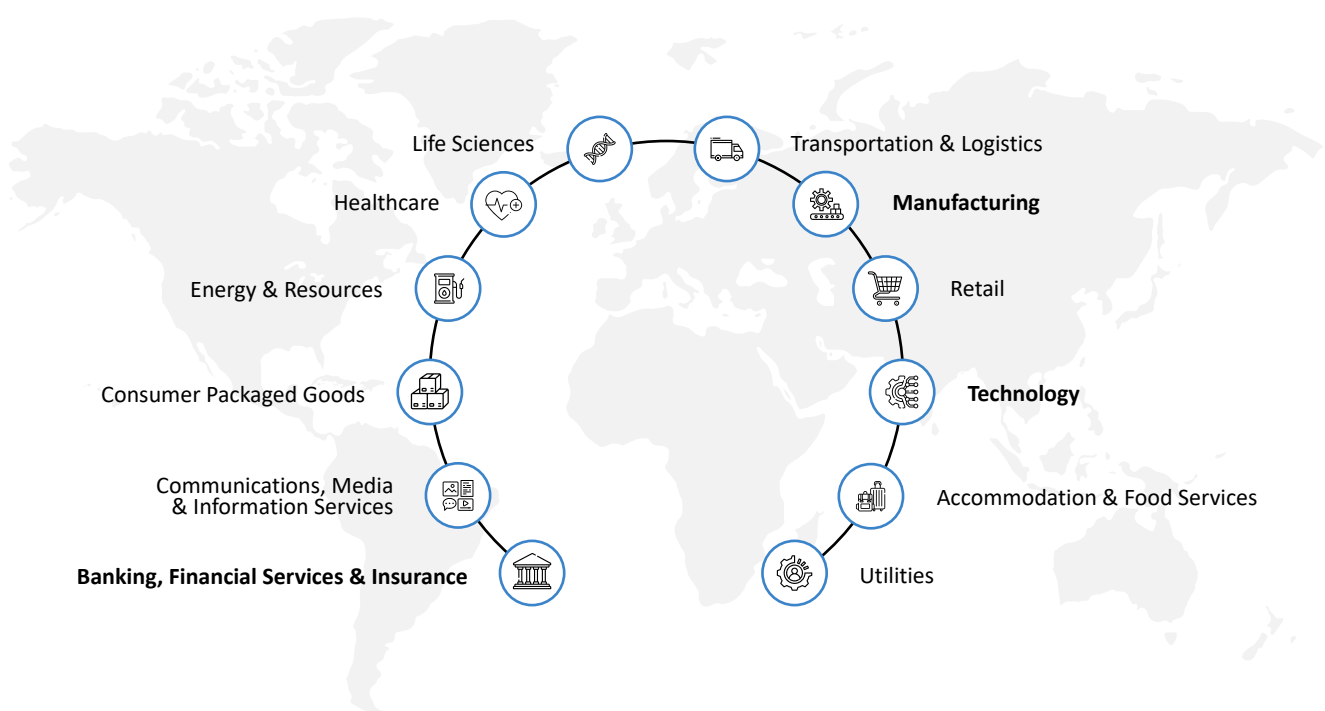


Note: Roles in bold met the minimum reporting threshold required for standalone analysis ($n \geq 35$). Roles below $n = 35$ are included in the total sample but are not reported as standalone cuts.

Roles and revenues



Industries



Note: Industries in bold met the minimum reporting threshold required for standalone analysis (n≥35). Industries below n=35 are included in the total sample but are not reported as standalone cuts.

About the study

Driven by TCS Autonomous Business Operations, the **Future of autonomous operations study** looks at how senior leaders are navigating the path to creating intelligent, adaptive, and autonomous operations. The TCS Thought Leadership Institute conducted a survey of over 300 global senior executives from organisations with annual revenues of \$5 billion or more. These executives, responsible for shaping the future of operations, represented companies across the United States, the United Kingdom, France, Germany, and Australia.

Industry-level findings are reported only for sectors meeting the minimum reporting threshold of $n \geq 35$. Other sectors are represented in the overall results but were not analysed separately due to sample size considerations. Not every answer is included in the findings report.

Since 2009, the **TCS Thought Leadership Institute** has initiated conversations by and for executives to advance the purpose-driven enterprise. Led by Serge Vatin-Perignon, the Thought Leadership Institute conducts primary research to deliver forward-looking and practical insights around key business issues to help organizations achieve long-term sustainable growth.

For more information, visit tcs.com/insights/global-studies

TCS Autonomous Business Operations

TCS Autonomous Business Operations helps enterprises break down siloes and integrate their operations as one cognitive system, giving them the intelligence, agility, and resilience to sustain competitive advantage. As this cognitive system matures, its natural evolution is toward operations that are autonomous, future-ready, and self-orchestrating.

Autonomous business operations build on this foundation, helping CXO heads achieve their strategic goals by making critical business functions future-ready and self-orchestrating, through a combinatorial effect of technology and operating model innovations. The way we deliver this at scale is through AI-led Autonomous GBS.

Through AI-led Autonomous GBS, TCS makes business operations the intelligent, adaptive backbone of the enterprise. The model embeds AI, GenAI, and agentic AI across end-to-end value chains, so enterprises move from people running processes to people governing outcomes, improving speed, quality, cost, resilience, experience, and decision effectiveness.

These capabilities span enterprise functions of finance and accounting, supply chain management, human resources, and customer experience, alongside industry-specific offerings for BFSI, communications, media and information services, retail and CPG, energy and resources, utilities, manufacturing, and travel, transportation and hospitality.

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About Tata Consultancy Services Ltd (TCS)

Tata Consultancy Services (BSE: 532540, NSE: TCS) is the technology partner of choice for industry-leading organizations worldwide. Since its inception in 1968, TCS has upheld the highest standards of innovation, engineering excellence, and customer service.

It has set an aspiration to become the world's largest AI-led technology services company and is enabling its clients to transform themselves across the full AI stack, from infrastructure to intelligence.

Rooted in the heritage of the Tata Group, TCS is focused on creating long term value for its clients, its investors, its employees, and the community at large. With a highly skilled workforce spread across 56 countries and 194 service delivery centers across the world, the company has been recognized as a top employer in six continents. With the ability to rapidly apply and scale new technologies, the company has built long-term partnerships with its clients. Many of these relationships have endured into decades and navigated every technology cycle, from mainframes in the 1970s to artificial intelligence today.

TCS sponsors 14 of the world's most prestigious marathons and endurance events, including the TCS New York City Marathon, TCS London Marathon, Tata Mumbai Marathon, and TCS Sydney Marathon with a focus on promoting health, sustainability, and community empowerment.

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