AI Transformation
by Neelverse Lab.

Executive summary

Global edition, November 2026

The Global AI Opportunity Report 2026–27

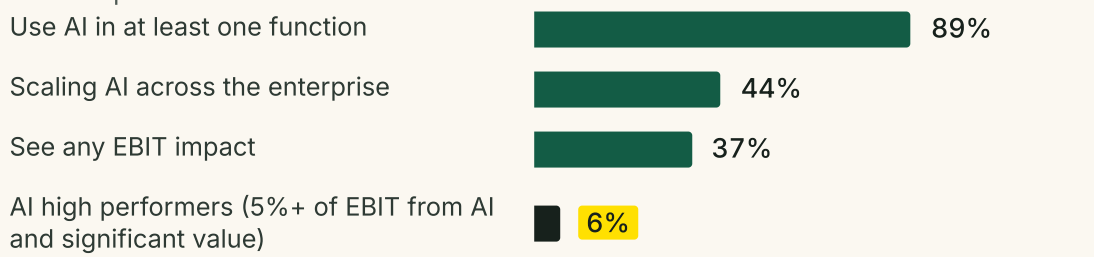
AI became normal. *Value stayed rare.*

Twelve findings from 46 countries and 25 industries, what they mean for each kind of reader, and the dates that will shape 2026–27.

- 2026–27 in numbers
- Twelve findings
- What it means for you
- The dates that matter

Of the organisations McKinsey surveyed in 2026

% of respondents



Source: McKinsey, The state of AI in 2026 [1]



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Evidence to 1 October 2026, corrected and updated to 2 November 2026

2026–27 in numbers

AI has moved from pilot to habit. Spending is up by half in a year, billions of people now meet AI in search and chat, and new rules are live on three continents. *But the money and the value are concentrated.*

$2.67T
worldwide AI spending forecast for 2026, up 49.5% on 2025 (Gartner) [2]

$3.64T
forecast for 2027 (Gartner) [2]

89%
of organisations use AI regularly (McKinsey 2026) [1]

37%
see any profit (EBIT) impact from it [1]

18.8%
of working-age people worldwide use AI (Microsoft, Q2 2026) [3]

73%
in the UAE, the world leader [3]

$286bn
US private AI investment in 2025, 83% of the world total [4]

$576bn
AI services spending forecast for 2026 (Gartner) [2]

The leaders are small, rich and digital: the UAE (73%), Singapore (64%), Ireland, France and Norway (about 49–50%). Large economies sit lower: the US at 33%, Japan at 25%, India at 18.5% and China at about 18% on this measure. The global average is 18.8%, with the Global North at 28.8% and the Global South at 16.2% [3].

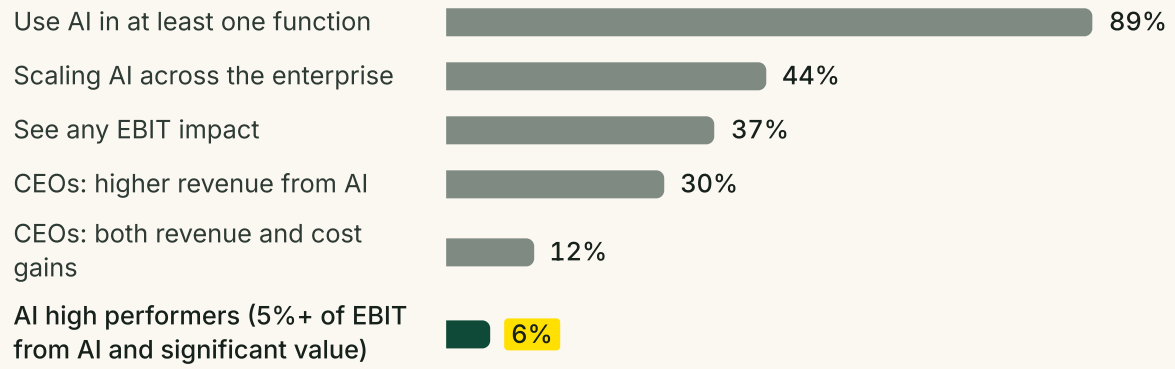
01 Finding 1 of 12

Use is near universal. Profit is not.

Nine in ten organisations now use AI, and 44% say it is scaling. Yet the share seeing any profit impact is stuck at 37%, and only about 6% are AI high performers: they attribute 5% or more of EBIT to AI and report significant value from it (McKinsey 2026)[1]. 56% of CEOs saw neither higher revenue nor lower costs in the past year (PwC)[5]. The gap is not access to models. It is redesigning work: 73% of high performers rebuilt their workflows, against 25% of the rest[1].

Exhibit 2

The value gap: share of organisations or CEOs, 2026



Source: McKinsey, The state of AI in 2026: On the road to ROI; PwC, 29th Annual Global CEO Survey [1] [5]

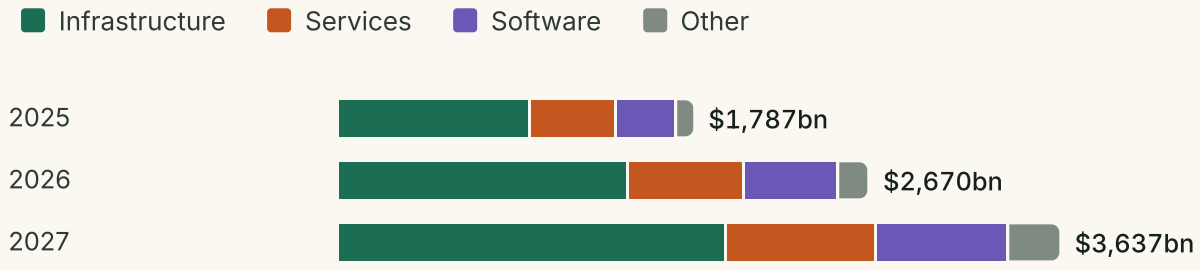
02 Finding 2 of 12

Spending is racing ahead, mostly into infrastructure.

Gartner now expects worldwide AI spending of $2.67 trillion in 2026, up 49.5%, and $3.64 trillion in 2027[2]. It has raised its 2026 forecast twice since January[6][7]. More than half goes to AI infrastructure: servers, chips and data centres. Services, where most companies actually buy help, grow from $434bn to $746bn over the three years[2].

Exhibit 3

Worldwide AI spending by segment, USD bn (Gartner, September 2026)



Source: Gartner, Forecasts Worldwide AI Spending (16 Sep 2026) [2]

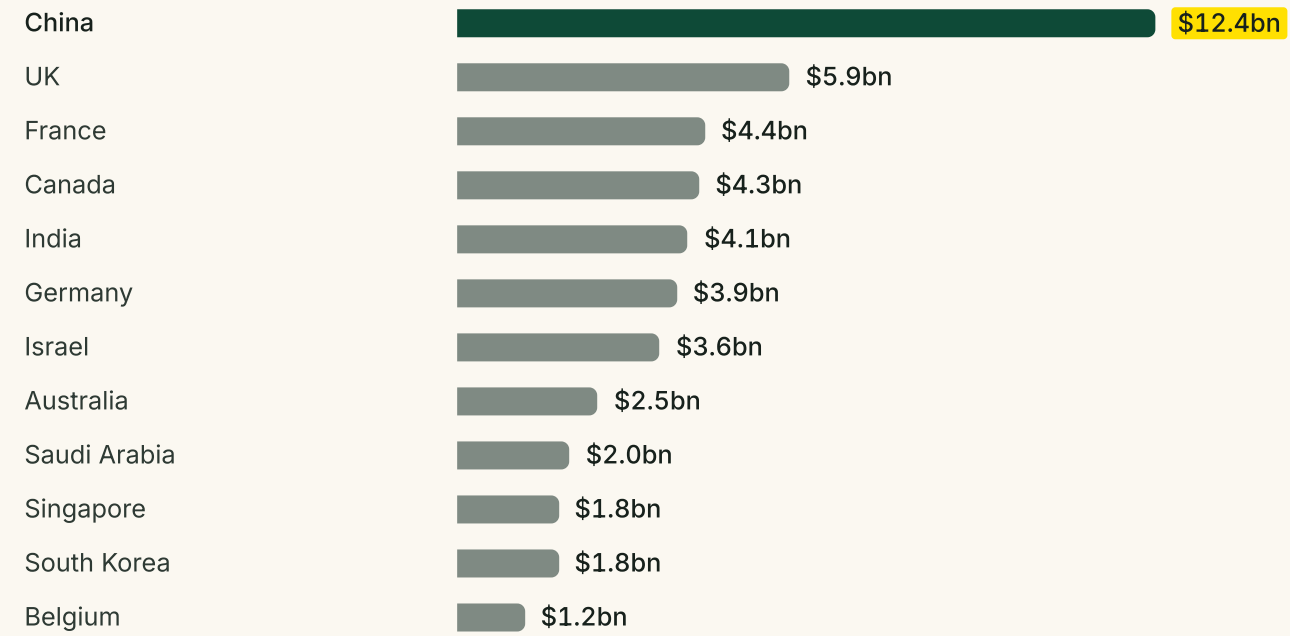
03 Finding 3 of 12

The capital map is lopsided.

Private AI investment reached $345bn in 2025. The US took $286bn of it, 23 times China, which came second[4]. Everyone else combined raised about a fifth of the US total. The UK, France, Canada, India and Germany follow, each with roughly $4–6bn[4]. Outside the US, AI is being built mostly with public money and big-tech capex, not venture capital.

Exhibit 4

Private AI investment outside the US, 2025, USD bn (US: $285.9bn)



Source: Stanford HAI, AI Index Report 2026 (Quid data) [4]

04 Finding 4 of 12

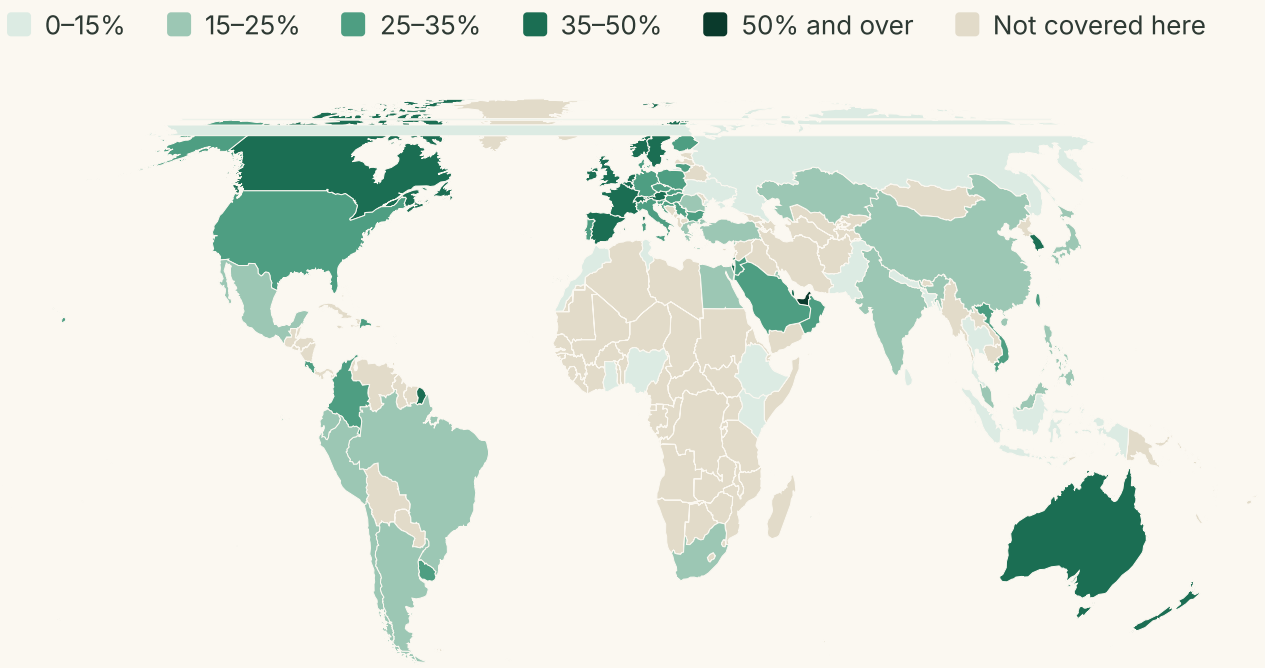
Everyday use is led by small, connected countries. The gap is widening.

The top of the AI-use table is the UAE, Singapore, Ireland, France, Norway and Spain. Big economies trail: the US ranks 21st[3]. In emerging markets, use is growing but from a low base, and the gap between the Global North (28.8%) and South (16.2%) is widening[3]. Where connectivity, English or local-language models, and digital government are strong, use follows.

Exhibit 1

Everyday AI use by country: share of working-age people using generative AI, Q2 2026

74 economies, % of working-age people (Part 1, Exhibit 1.7). Darker means more use.



Source: Microsoft AI Economy Institute, Global AI Diffusion Q2 2026 (74 economies shown). [3]

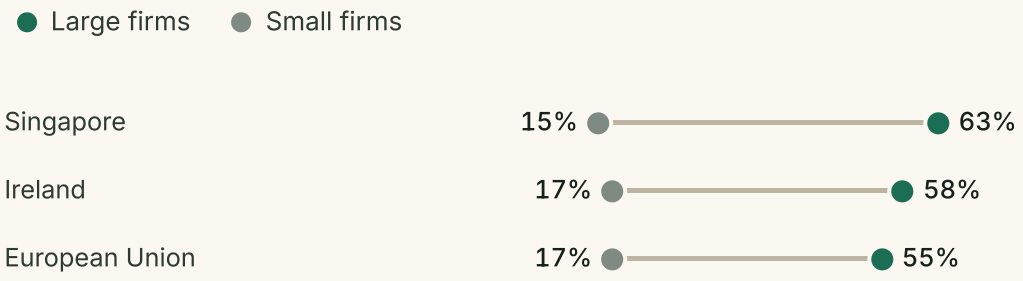
05 Finding 5 of 12

Big firms are pulling away from small ones.

In the EU, 55% of large firms use AI against 17% of small ones[8]. In Singapore it is 62.5% of non-SMEs against 14.5% of SMEs[9], and in Ireland 57.7% against 17.2%[10]. In the UK, the government's AI Adoption Survey 2026 puts large firms at 52% against 32% of all firms[11]. McKinsey finds 40% of $1bn-plus companies scaling AI agents, up from 27%, while smaller firms are flat at 22%[1][12]. The next wave of opportunity is making AI simple and affordable for the mid-market and small businesses, which is where most jobs sit.

Exhibit 6

Share of firms using AI, large vs small



Source: Eurostat 2025 and CSO Ireland 2025 (large 250+, small 10–49 staff); IMDA Singapore 2024 (non-SMEs vs SMEs) [8][10][9]

06 Finding 6 of 12

Search is becoming an answer engine. Ads and checkout follow.

Google's AI Mode has passed a billion monthly users and the Gemini app 950 million (company figures)[13]. OpenAI says ChatGPT has 1.2 billion weekly users[14], and its ads business reached a $1bn annualised run-rate within about 200 days, OpenAI said in August (claimed)[15]. Three agent-commerce protocols launched in four months (Google AP2, OpenAI/Stripe ACP, Google UCP)[16][17][18]. OpenAI has since moved away from checkout inside ChatGPT (CNBC)[19], but checkout inside assistants is live in the US at Google, through Universal Cart since 15 October[20], and at Meta, whose Muse agent buys through Stripe's Link (company announcements)[21]. For marketers, being the answer now matters as much as ranking, and users clicked a source link inside an AI Overview in only about 1% of visits (Pew Research, July 2025)[22].

Search becomes an answer engine

1bn+
monthly users of Google's AI Mode (company figure) [13]

1.2bn
weekly ChatGPT users, OpenAI says [14]

$1bn
annualised run-rate of OpenAI's ads business within about 200 days (claimed) [15]

~1%
of visits in which users clicked a source link inside an AI Overview (Pew Research, July 2025) [22]

07 Finding 7 of 12

The AI services economy is booming, and moving to outcomes.

Gartner puts AI services at $576bn in 2026[2]. Among the largest consultancies, Accenture grew 5% in local currency in fiscal 2026 (7% in the June-August quarter) [27] and IBM consulting was flat[23]. Buyers are shifting from hours to outcomes: Intercom prices its AI agent at $0.99 per outcome (resolutions, completed workflows and handoffs)[24] and Salesforce Agentforce at $2 per conversation[25]. Buying through a partner works twice as often as building alone (66% vs 33% success, MIT NANDA[26])‡.

Exhibit 7

AI services spending worldwide, USD bn



Source: Gartner (Sep 2026) [2]

08 Finding 8 of 12

The rules arrive labels first, heavy duties later.

Across major markets the first binding rules are about transparency: label AI content, disclose chatbots and automated decisions. Heavier obligations are being delayed. The EU's AI Omnibus moved high-risk duties to December 2027 and August 2028 [28], while labelling applies now. In the US, federal pre-emption has not stopped the states, and 1 January 2027 is the next big compliance date [29] [30] [31].

What starts, and when

1 Sep 2025	**China** AI content labelling rules in force [32]
22 Jan 2026	**South Korea** AI Basic Act takes effect (fines deferred) [33]
20 Feb 2026	**India** labelling of AI-generated content binding [34]
1 Mar 2026	**Vietnam** standalone AI law in force (the first in ASEAN found for this report) [35]
2 Aug 2026	**EU** AI Act transparency (Article 50) applies [36]
Data to 2 November 2026	
1 Jan 2027	**US** Colorado, California ADMT and New York RAISE rules start [29] [30] [31]
13 May 2027	**India** full DPDP data-protection duties [37] [38]
2 Dec 2027	**EU** high-risk AI obligations (delayed by the AI Omnibus) [28]

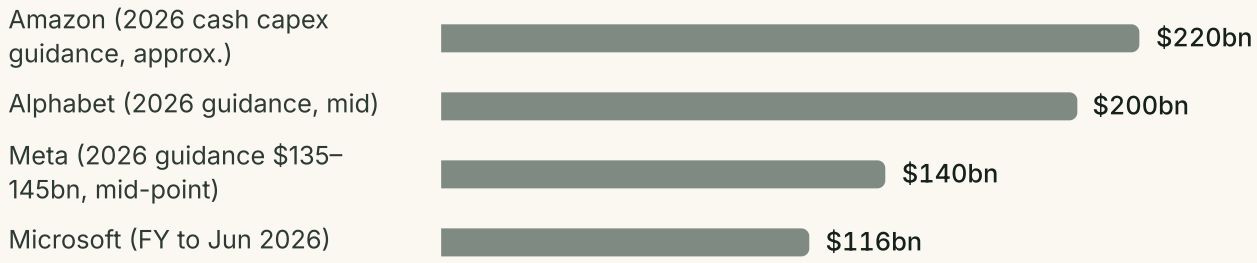
09 Finding 9 of 12

A compute and sovereignty race is under way.

The four largest US platforms are spending well over $600bn a year on capital expenditure, mostly for AI [39] [40]. IDC counts $318bn of AI infrastructure spend in 2025 [41]; the US took about three quarters in the latest quarters (77% in Q4 2025 [41], 75.7% in Q1 2026 [42]). Governments are building their own capacity: Stargate UAE [43], Saudi Arabia's HUMAIN [44], the IndiaAI Mission's 38,000-plus subsidised GPUs (with 20,000 more announced) [45], EU AI gigafactories [46] and a UK AI Research Resource with 21 exaflops of public compute in 2025 and 420 targeted by 2030 [47].

Exhibit 8

Capital expenditure of the largest US platforms, USD bn (periods differ, as labelled)



Source: Company earnings releases, Q2 2026 (Alphabet, Microsoft) and Q3 2026 (Amazon [48], Meta [49]) [39] [40]

10 Finding 10 of 12

Jobs: an entry-level squeeze, not mass layoffs.

Employment of 22–25-year-olds in AI-exposed US jobs is 19% below trend (Stanford/ADP data) [50]. Yet only 14% of organisations actually cut headcount because of AI last year, against 32% who expected to; 39% now expect cuts next year (McKinsey) [1]. The WEF still sees 170 million jobs created and 92 million displaced by 2030 [51]. The pressure is on junior roles and on how people are trained.

Exhibit 9

Work and AI: the early evidence

−19%
young workers in AI-exposed jobs vs trend (US) [50]

14%
of firms cut headcount due to AI last year [1]

39%
expect AI-related cuts next year [1]

170m / 92m
jobs created vs displaced by 2030 (WEF) [51]

Source: Brynjolfsson, Chandar & Chen, Canaries in the Coal Mine?; McKinsey, The state of AI in 2026: On the road to ROI; World Economic Forum, Future of Jobs Report 2025

11 Finding 11 of 12

China runs a parallel AI economy at near-zero prices.

More than 700 million people in China used generative AI in the first half of 2026, over half the population[52][53], and in CNNIC's 2025 survey more than 90% picked a domestic model first[54]. 1,112 AI services had filed with the regulator by August[55]. API prices have fallen close to the floor (DeepSeek at RMB 1 per million input tokens off-peak)[56], and in June ByteDance's Volcano Engine shifted its pitch from price cuts to capability (Doubao 2.1)[57]. Chinese open-weight models are now the default in many emerging markets.

China in four numbers

700m+
people in China used generative AI in the first half of 2026 [52][53]

90%+
picked a domestic model first (CNNIC's 2025 survey) [54]

1,112
AI services had filed with the regulator by August [55]

RMB 1
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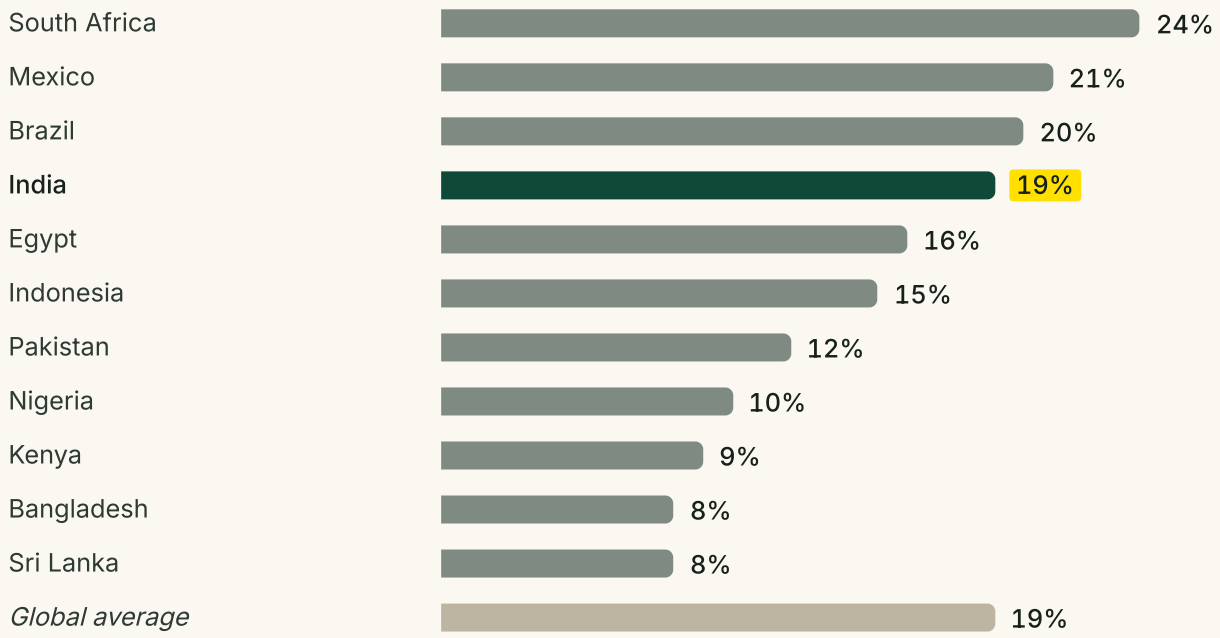
12 Finding 12 of 12

Emerging markets: fast-growing use on thin infrastructure.

OpenAI says India has about 100 million weekly ChatGPT users (claimed) [58], yet only 18.5% of working-age people use AI on Microsoft's measure [3]. Brazil, Mexico and South Africa sit near or above the global average; Indonesia, Kenya, Bangladesh and Pakistan below it. Africa holds about 0.6% of global data-centre capacity (World Bank, October 2026) [59], and several flagship projects have stalled. Where WhatsApp, mobile money and local languages meet AI, adoption jumps: that is the design brief for 2026–27.

Exhibit 10

Share of working-age people using AI, selected emerging markets, Q2 2026



Source: Microsoft AI Economy Institute, Q2 2026 [3]

What it means for you

CMOs and marketing leaders

- Treat AI answers as a channel: measure how assistants describe your brand, fix the sources they read, and budget for AI-search ads as they open.
- Label AI content now. Transparency rules are among the first rules to bite: labelling already applies in China, India and Vietnam, and in the EU since August 2026 [32] [34] [35] [36] (after the 2025 bans and GPAI duties).
- Buy outcomes, not tools: tie AI content, service and lead-handling work to a metric you already report.

CEOs and boards

- Ask for the value, not the usage. Only about a third of firms see profit impact [1]; demand a workflow redesign plan, not more pilots.
- Build a 2026–27 compliance calendar: labelling, automated-decision notices and data-protection deadlines land within 15 months.
- Decide what to buy and what to build. Partnered deployments succeed about twice as often as solo builds (MIT NANDA [26])‡.

Founders and SMB owners

- Start where AI pays fastest: customer service, lead response, content and bookkeeping. Keep a human on anything that touches money or health.
- Use the subsidies: Singapore, Malaysia, the UK and others fund AI adoption for small firms [60].
- Pick tools that work where your customers are: WhatsApp, local languages, mobile payments.

Investors

- The infrastructure trade is crowded; look at the services and application layers where buyers are moving to outcome pricing.
- Watch the gap between usage and profit: the winners will be firms that turn AI into repeatable workflows.
- Sovereign AI programmes create local demand for integrators, data work and language models.

Agencies and service providers

- Productise: package audits, agents and content engines at clear prices, with outcome-linked options.
- Move up to compliance and measurement: clients need labelling, consent and proof, not just output.
- Specialise by country and language; the price gap between markets is three to ten times for similar work [61].

Part 7 turns these into full playbooks, with checklists and 90-day plans for each reader. Read Part 7 aitransformation.in/reports/ai-opportunity-2026-27/#part7.

Executive summary

The dates that matter, November 2026 to December 2027

Data to 2 November 2026

13 Nov 2026	**India** DPDP consent-manager provisions start [37] [38]
2 Dec 2026	**EU** Watermarking grace ends for AI systems already on the market; ban on AI nudification apps applies [28]
10 Dec 2026	**Australia** Privacy policies must disclose automated decisions [62]
1 Jan 2027	**United States** Colorado's new AI law, California automated-decision rules and New York's RAISE Act start [29] [30] [31]
Jan 2027	**EU** ChatGPT's duties as a Very Large Online Search Engine under the DSA begin [63]
Early 2027	**Australia** Legislated Australian Standards for AI expected [64]
Mar 2027	**Vietnam** Existing AI systems must comply with the AI law (Sep 2027 in health, education and finance) [35]
13 May 2027	**India** Full DPDP data-protection duties apply [37] [38]
2 Dec 2027	**EU** High-risk AI duties (Annex III) apply after the AI Omnibus delay [28]
2027	**Global** AI spending forecast to reach $3.64 trillion (Gartner) [2]

Every rule date is tracked in the Part 4 calendar; sources are in the country chapters in Part 2. Check the latest official texts before acting.

The Global AI Opportunity Report 2026–27

Every number, with its source

The full report	**Read the full report** aitransformation.in/reports/ai-opportunity-2026-27 The opening pages, with the twelve findings, are free to read; the rest opens with your email.
The slides	**The slides come with the full report, free with your email** aitransformation.in/reports/ai-opportunity-2026-27/#1-2-adoption-and-the-value-gap

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Sources

Each number above links to its source with a numbered chip. These are the same sources the full report cites.

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