

# Scaling AI-driven enterprise through mobile and cloud

Strategic insights and digital market trends



**ERICSSON**

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# Mobile and cloud are vital for enterprises to unlock the full value of AI

Enterprises are at a tipping point in their transformation journeys, with successful AI adoption and scaling achieved currently by only a relatively small number of frontrunners.

## Executive summary

This report examines how AI is viewed as an essential driver of digital transformation by nearly 90 percent of organizations – but at present only about 10 percent have successfully scaled AI to unlock its full value.

In it, we explore this “scaling gap” – the difference between a stalled pilot and a full evolution – using new research commissioned by Ericsson.<sup>1</sup>

The research findings draw on insights from over 100 enterprise chief officers (CxOs), senior decision makers and managers across 5 industry segments in large companies in North America, Europe and Asia. They highlight the roles of mobile and cloud technologies in enabling this AI-led digital transformation. The findings also showcase the main use cases in 5 industry segments, namely manufacturing, healthcare, retail, financial services and public safety.

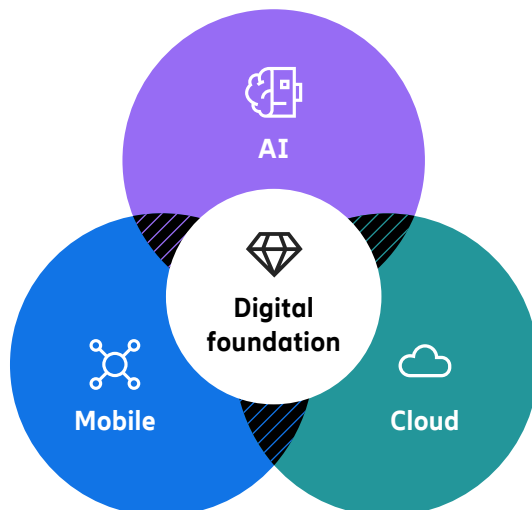
## Digital foundation

The research demonstrates that AI cannot exist in a vacuum. It requires a modern digital foundation, where mobile – currently cellular 4G and 5G, and 6G going forward – acts as the engine for differentiated connectivity, while cloud serves as the computational engine for data management. Together, this tech trio of AI, mobile and cloud deepens digitalization by automating core operational tasks that once required human effort and intuition, thereby creating a path for innovation and growth.

## Research key findings

- Nearly 90 percent of enterprises view AI as an “essential contributor” to their success over the next 2–3 years.
- Currently, only about 10 percent of enterprises have successfully scaled AI to unlock its full value.
- Nearly all enterprises plan to increase their AI investments, with an average budget increase of 20 percent expected over the next few years.
- Success is currently hindered because only 10–20 percent of enterprises have “mature enablers” (mobile and cloud infrastructure) in place to support AI scaling.
- High-value AI-enhanced use cases are delivering an average of 30 percent return on investment (ROI).

Figure 1: The value of AI increases proportionately when powered by mobile and cloud capabilities



**AI:** The intelligence engine that interprets, learns from, predicts and acts on data to create value in real time.

**Mobile:** The communication engine that moves data without wires through differentiated connectivity, low latency and high bandwidth.

**Cloud:** The computational engine and service platform that stores, manages and transforms data as and when required.

Note: Survey of over 100 CxOs, senior decision makers and managers across 5 industry segments in large companies in North America, Europe and Asia. Source: Arthur D. Little; Ericsson

<sup>1</sup> Arthur D. Little, the global management consulting firm, was commissioned to undertake research on behalf of Ericsson. All statistics in this report are from that research.

# The AI maturity gap: Distinguishing market leaders from followers

Securing a place in the autonomous future requires enterprises to act now and build for the long term.

Our research shows that today, 37 percent of enterprises are accelerating their business growth, fueled by AI that has become sophisticated and business-savvy, while 12 percent are still in early stages.

For modern enterprises, adopting AI is not an option but a commercial necessity. The most successful AI momentum in businesses is underpinned by the synergy of mobile (the communication engine) and cloud (the computational engine).

Enterprises that are mastering this synergy are capturing:

- **Efficiency gains** of 45 percent.
- **High-value AI-led use cases** delivering an average of 30 percent ROI.
- **Profound transformation** across use cases in tracking and monitoring, connected operations, enterprise collaboration, customer engagement and digital devices.

### The next frontier: Agentic AI and 6G

Looking ahead to the 2030s, enterprises are racing toward agentic AI: Autonomous systems capable of strategizing and executing complex tasks with minimal human intervention. Supported by the emergence of 6G and enhanced Industrial IoT (IIoT), this progress will enable real-time data interpretation across global footprints, turning business operations into autonomous, value-delivering systems.

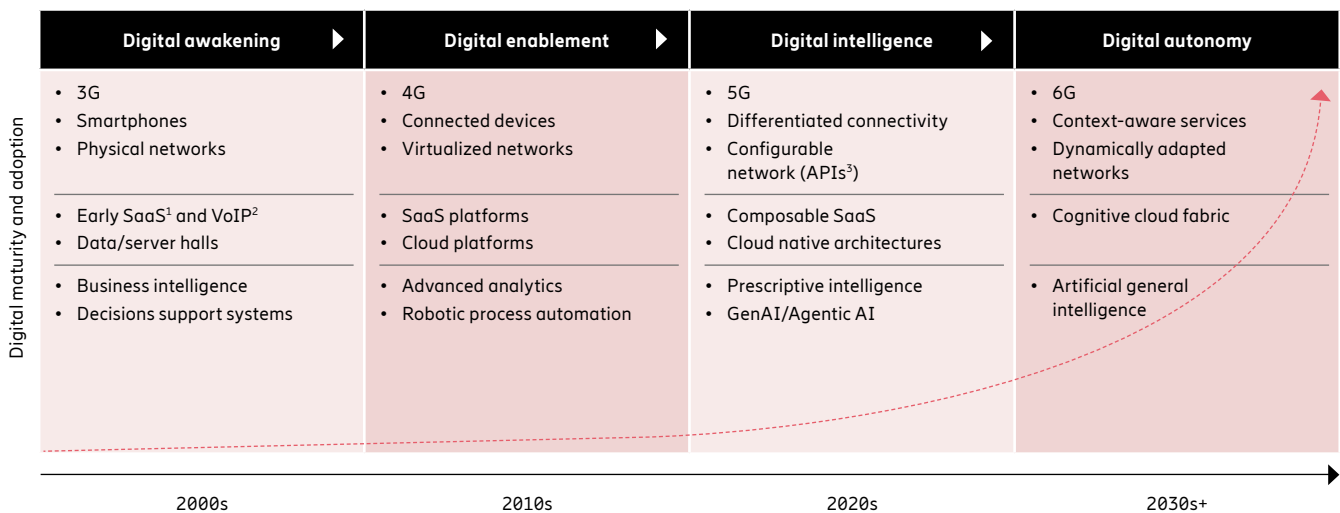
For today's business leaders, the mandate is clear: Build the foundation of high-quality data (86 percent) and committed leadership (84 percent) now to secure their place in the autonomous future.

### "The Great Divide": Leaders vs. Followers

The gap between those enterprises that are pulling ahead and those that are still in early stages comes down to AI readiness:

- **Leaders:** These organizations possess high-quality, integrated data and secure, modern infrastructure reinforced by a clear leadership strategy.
- **Followers:** These organizations are hindered by fragmented legacy systems, security and compliance constraints, plus poor-quality data coupled with a resistance to change.

Figure 2: The digital transformation journey has been unfolding for decades, and is accelerating



Note: Survey of over 100 CxOs, senior decision makers and managers across 5 industry segments in large companies in North America, Europe and Asia  
 Source: Arthur D. Little; Ericsson

<sup>1</sup> Software as a Service  
<sup>2</sup> Voice over Internet Protocol  
<sup>3</sup> Application programming interfaces

# AI is a key driver in digital transformation for businesses

AI is accelerating the pace of digitalization by automating processes and enabling systems that learn, adapt and respond faster than traditional technologies.

According to our study, there is a significant disconnect between how much business leaders value AI and how much they are actually investing in it right now.

Currently, only 8 percent of enterprises have scaled AI, with 59 percent reporting selective adoption and 33 percent in the pilot stage. However, use of AI is expanding dramatically within enterprises, with 90 percent viewing it as an essential contributor over the next two to three years. The perceived importance of AI in advancing digital transformation has risen from a rating of 6.7/10 over the last few years to 7.9/10 for the near future. Enterprise executives who were surveyed highlighted several technical factors they consider to be foundational for scaling reliable AI: notably strong data quality, robust data security and seamless IT integration.

### AI investments are set to rise

Introducing AI technology into businesses on its own is not enough. In order to successfully adopt AI,

enterprises need to address both organizational and technical factors.

The executives surveyed emphasized the importance of addressing organizational factors such as processes to scale AI, clear strategy and leadership commitment, and effective change management. In addition, they highlighted the role of technical factors such as strong data quality, robust data security and seamless IT integration as being foundational for adopting and scaling reliable AI.

As a result, AI investments are set to rise sharply, with nearly 100 percent of enterprises planning to increase their AI spend, and 17 percent expecting investment growth of more than 50 percent. These investments reflect a clear expectation that AI will deliver transformation at scale.

While those surveyed identified both IT operations and cybersecurity as being the top AI-embedded areas (65 percent), the research also revealed that AI is increasingly integrated across

a greater number of business functions. These include customer relationship and experience management (61 percent), risk management and regulatory compliance (43 percent), and operations and supply chain (38 percent).

The growing use of AI significantly increases reliance on harnessing data appropriately. A total of 88 percent of leaders expect AI solutions to rely heavily on real-time data analytics.

**AI has been selectively adopted by 59 percent of enterprises.**

59%

Figure 3: AI is a significant catalyst for the digital transformation of enterprises



Note: Survey of over 100 CxOs, senior decision makers and managers across 5 industry segments in large companies in North America, Europe and Asia  
Source: Arthur D. Little; Ericsson

# How AI combined with mobile and cloud creates a solid digital foundation for growth

When used together, AI, mobile and cloud enable data to be captured, connected and converted into actionable insights.

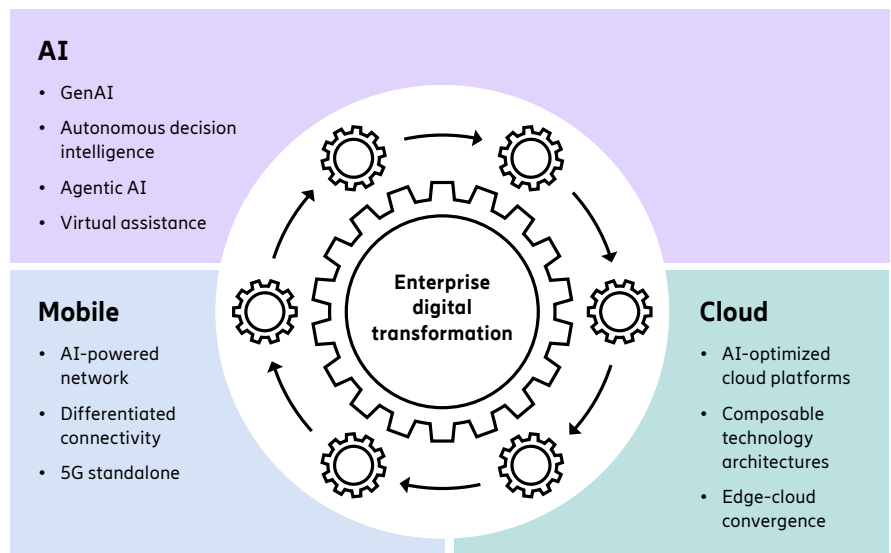
The symbiotic relationship between the tech trio of mobile, cloud and AI is making them primary enablers of digitalization.

This is changing how enterprises operate and, increasingly, what they can achieve. In effect, they provide three engines for evolution:

- **AI, the intelligence engine:** Interprets and learns from data to automate core operational tasks once reliant on human insight.
- **Mobile, the communication engine:** Provides the high bandwidth, low latency and differentiated connectivity required to move data seamlessly across global footprints.
- **Cloud, the computational engine:** Acts as the service platform that manages, transforms and stores data, providing the scalability AI workloads demand.

Data moves between AI, mobile and the cloud to deliver measurable outcomes to enterprises. The interplay between these elements is essential, with interaction from all three being necessary for this digital transformation to work. This gives enterprises with scaled AI an industry edge to activate business strategy, respond in real time and operate in a more resilient, intuitive and insightful way.

Figure 4: Mobile, cloud and AI symbiotically unlock capabilities for accelerating digital transformation



The executives in the survey expect AI to deliver real-world, measurable results across the areas of efficiency (45 percent), experience (35 percent) and innovation (20 percent). Efficiency includes improved operational efficiency (valued by 54 percent). Experience includes improved workplace and employee satisfaction (32 percent). Innovation includes competitive differentiation (22 percent).

**A total of 45 percent of enterprise executives expect AI to deliver measurable results in efficiency.**

# 45%

Figure 5: Enhanced efficiency, experience and innovation are unlocked by mobile- and cloud-powered AI capabilities

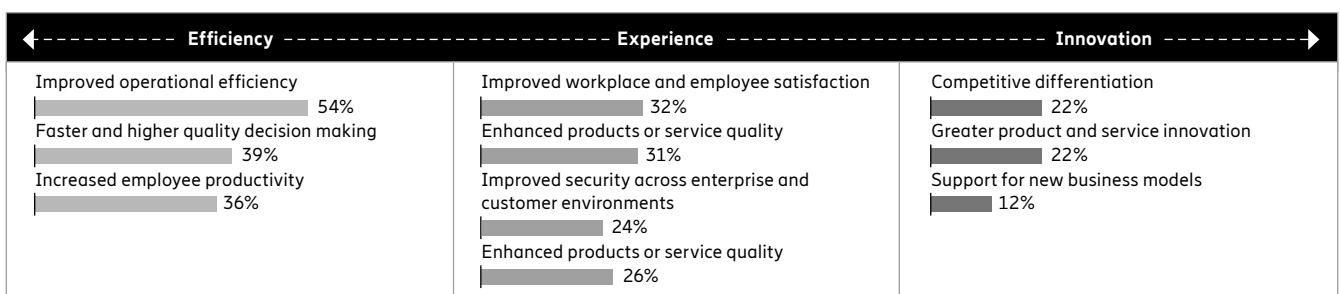


Figure 4 and 5 note: Survey of over 100 CxOs, senior decision makers and managers across 5 industry segments in large companies in North America, Europe and Asia. Source: Arthur D. Little; Ericsson

# Why mobile and cloud technologies are vital for enabling full AI capabilities

Uptake of mobile and cloud technologies is essential to scale AI, and enterprises know it.

There is wide or moderate adoption of mobile and cloud technologies (69 percent and 77 percent, respectively) among those surveyed. This means that 31 percent and 23 percent of enterprises have limited or early adoption of mobile and cloud technology, respectively.

### Digital transformation

Of those surveyed, 37 percent reported increased investment in mobile technology of more than 20 percent, with increased cloud investment recorded as 56 percent. In terms of the impact of mobile as an enabler of AI, 92 percent believe it will be moderate to large or foundational, with 98 percent expressing the same belief for cloud technology.

### Enterprise benefits

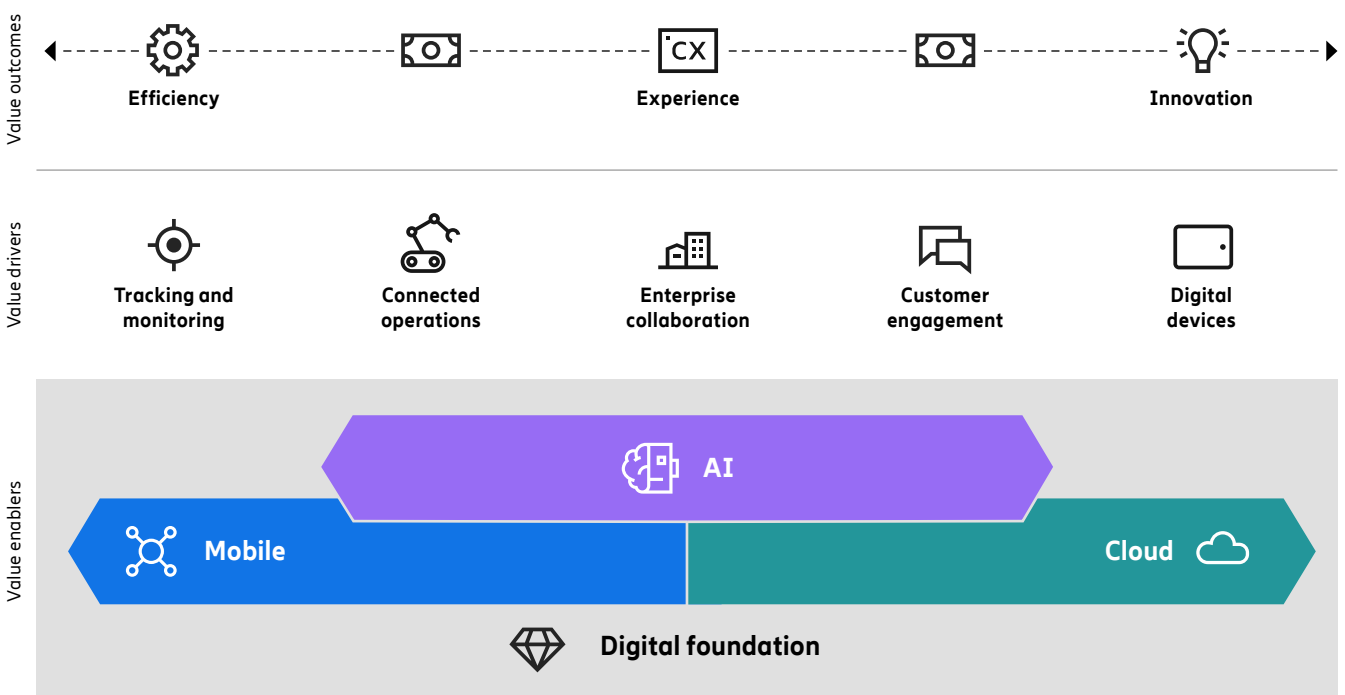
The enterprise benefits of AI, mobile and cloud working together can be seen in the way they power five key use case categories to deliver enhanced value across efficiency, customer experience and innovation. These categories are:

- tracking and monitoring
- connected operations
- enterprise collaboration
- customer engagement
- digital devices

Almost all enterprises believe the impact of mobile in enabling AI will be moderate to large or foundational.

92%

Figure 6: AI combined with mobile and cloud technologies creates a solid digital foundation for growth



Note: Survey of over 100 CxOs, senior decision makers and managers across 5 industry segments in large companies in North America, Europe and Asia  
 Source: Arthur D. Little; Ericsson

# Enterprises see strong AI use cases enabling efficiency, experience and innovation

Enterprises that successfully adopt and scale AI will derive strong benefits, with augmented operational efficiency, enhanced customer experience and accelerated innovation.

In our research, 75 percent of the respondents identified 5 key use case categories where AI will drive a significant impact. These are:

**Tracking and monitoring** of people, assets and systems using spatial and operational data over time. Use cases include movable assets and goods tracking, connected products, equipment condition tracking, camera surveillance, drone and robot surveillance, plus customer behavior monitoring. The high-value use cases dominant in this category are manufacturing and retail, followed by healthcare.

**Connected operations** by enabling execution of operational tasks through connected people, machines and systems. Use cases include remote control of

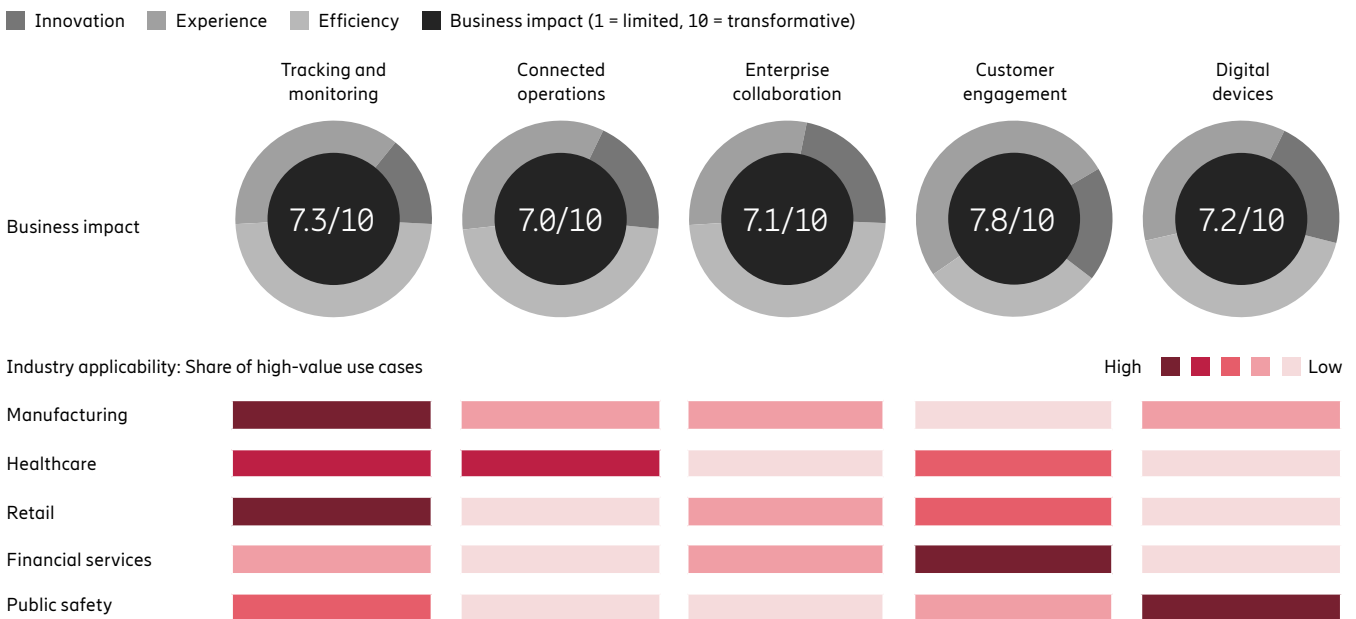
machines/robots, remote operation of site equipment, autonomous mobile robots (AMRs), human-assisting robots, drone delivery and transport, plus industrial control communication. The high-value use cases dominant in this category are healthcare and manufacturing.

**Enterprise collaboration** for secure real-time connectivity and collaboration across an organization. Use cases include unified communication and collaboration, interconnected offices, connected workforce enablement, business-critical push-to-communication, computer vision and mobile communication for pop-up branches. The high-value use cases dominant in this category are manufacturing, retail and financial services.

**Customer engagement** in which interactive communication and data exchange enhance customer experience and insight. Use cases include omnichannel communication, real-time conversational interaction, intelligent contact center operations, video-enabled customer support, personalized customer engagement and predictive fraud detection. The high-value use case dominant in this category is financial services.

**Digital devices** comprise interactive digital systems that enable user engagement or services via connected infrastructure. Use cases include connected self-service and transaction devices, connected workstations and control interfaces, connected tools, mobile computer vision cameras, connected vehicles and connected wearables. The high-value use case dominant in this category is public safety.

Figure 7: Impact across use case categories varies by industry-specific AI traits



Note: Survey of over 100 CxOs, senior decision makers and managers across 5 industry segments in large companies in North America, Europe and Asia  
 Source: Arthur D. Little; Ericsson

# Industries recognize the importance of mobile and cloud technologies for scaling AI

The majority of respondents in the five industrial sectors surveyed acknowledge that mobile and cloud technologies are necessary to power a crucial AI-ready network.

A total of 83 percent of enterprises stated that mobile and cloud are notable enablers for AI. In manufacturing and public safety industries, 95 percent of enterprises believe that mobile and cloud are notable enablers for AI. In healthcare and retail, that figure is 90 percent, with 80 percent of enterprises valuing mobile and cloud in the financial services sector. AI is also essential for high-priority connectivity with performance guarantees needed for network APIs.

### How mobile enables AI

Mobile makes it possible for real-time AI applications to function by utilizing on-device processors, which may include cameras and/or sensors. This can enable industry-specific apps

to work, make data-driven decisions in the moment and enhance operations.

In addition, mobile enables AI to advance security and fraud solutions, as well as monitor large amounts of data and engage with end-users. The security benefits of combining mobile and cloud can be seen in the use of network APIs by Vonage, where programmability is critical to the vertical-specific solutions offered.

### How the cloud enables AI

Instead of AI being an inaccessible technology with costly infrastructure, the cloud ultimately makes it available to industries of all shapes and sizes. This brings advantages such as lower maintenance and hardware costs,

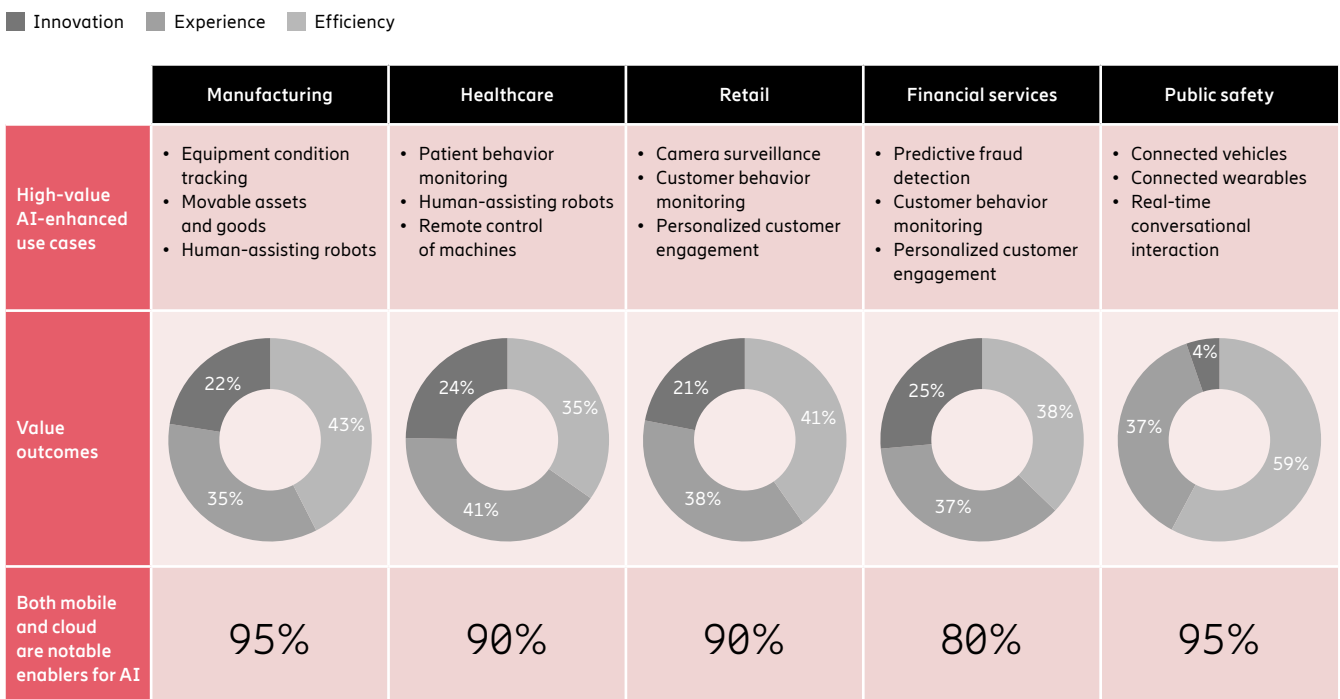
faster data processing and access to advanced software features that make AI user-friendly.

The cloud lets enterprises benefit from AI without diving into a digital lake of endless complexity, creating a gateway for AI to operate effectively for businesses.

**Mobile and cloud are considered to be notable enablers for AI by 83 percent of enterprises.**

# 83%

Figure 8: All industries see strong value, with mobile and cloud as essential AI enablers



Note: Survey of over 100 CxOs, senior decision makers and managers across 5 industry segments in large companies in North America, Europe and Asia  
 Source: Arthur D. Little; Ericsson

# Mobile and cloud investments are essential to realizing the full potential of AI

To enable high-value AI use cases that typically attract 30 percent ROI, enterprises need to invest in mobile and cloud technologies.

## Conclusion

The Ericsson research underlines that mobile and cloud investments are essential to unlock AI's potential. They are adjacent and connected but are seldom the same in terms of investments and buying processes.

This message about the importance of embedding AI in the DNA of industry is being heard loud and clear, with 98 percent of enterprise executives surveyed expecting to increase their AI investments going forward.

## Digital transformation

While an AI-accelerated digital transformation is taking place, there are still industries and individual businesses that cannot benefit fully from these capabilities. This is because their networks are simply not AI-ready. Between 80 and 90 percent of enterprises need to level up mobile and cloud enablers for maximum impact.

## Investment set to rise

Average investment in mobile and cloud is set to rise by 23 percent in the near future, as business leaders seek to capture enhanced efficiency, experience and innovation value. A total of 46 percent of industry executives are poised to increase their investments in AI by more than 20 percent. With AI disrupting businesses in so many directions, investment is about transforming digital use cases to ones that feature AI integration, before reaching fully-scaled AI potential.

## Meeting AI-scaling demands

Investing in mobile and cloud means leading the charge of an AI-led digital transformation. This will enable enterprises to meet the demands for:

- high performance required for intense AI workloads
- high scalability required for AI adoption
- high flexibility required to adapt across diverse deployment environments across geographies

**Up to 90 percent of enterprises need to level up mobile and cloud enablers for maximum impact.**

90%



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