TÜSİAD

GenAI: Ready or Not?

Perspectives on talent, leadership and cultural transformation

BAIN & COMPANY

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Perspectives on talent, leadership and cultural transformation

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Preface

TÜSİAD (Turkish Industry and Business Association is a civil society organization established by Turkish industrialists and businesspeople in 1971 to represent the business world.

TÜSİAD aims to contribute to the formation and development of a social order based on the adoption of the universal principles of human rights, freedom of thought, belief, and action, a secular state of law, concepts of participatory democracy, a liberal economy, the rules and regulations of a competitive market economy and a sustainable environmental balance.

TÜSİAD works to achieve the realization of the main objectives stated above based on the belief that businesspeople working in line with the targets and principles envisaged by Atatürk guided by a concept of Türkiye's reaching and surpassing the norms of contemporary civilization and bolding to the equality of men and women in politics, the economy and education, comprise a pioneering and enterprising group in society.

As a representative body of the Turkish Business world working for the public good, TÜSİAD strives to manifest activities to entrepreneurs in conformity with the universal principles of Business ethics. TÜSİAD constantly aims for progress and enhancement in Türkiye's competitiveness, social welfare, employment, and productivity, as well as the country's capacity for renewal and the scope and quality of education and training during globalization.

TÜSİAD contributes to the formation of national economic policies by correctly evaluating regional and sectoral potentials in Türkiye's economic and social development in an environment in which social peace, compromise, and reconciliation are maintained.

TÜSİAD promotes Türkiye globally and supports the EU accession process through efforts to develop international political, economic, social, and cultural relations and communication, representative, and cooperative networks.

TÜSİAD conducts research, forms views, and develops projects and activities to accelerate international integration and influence-building regional and local development.

TÜSİAD aims on behalf of the Turkish Business world to encourage and develop a unity of thought and action in line with these objectives through the direct and indirect dissemination of its views and recommendations to the Turkish parliament, government, other states, international organizations, and public opinion, through the press and other means.

TÜSİAD, by its mission and the context of its activities, initiates public debate by communicating its position supported by scientific research on current issues.

The report prepared in collaboration with Bain & Company within the scope of the activities of the Digital Strategies and New Technologies Working Group, which operates under the TÜSİAD Digital Türkiye Roundtable, explores how organizations are adopting GenAI across industries, the ways it is reshaping workforce dynamics and organizations, and what leadership actions and cultural shifts are needed to enable successful AI transformation.

We would like to thank Perihan İnci, Chair of the TÜSİAD Digital Türkiye Roundtable, and Burak Aydın, Chair of the Digital Strategies and New Technologies Working Group, for their support and guidance throughout the research process. We would like to thank Feyza Narlı for her valuable contributions during the report preparation process. We also extend our gratitude to Nursel Ölmez Ateş, Efe Erdem, Bilge Kalpaklıoğlu Eyilik, Hüseyin Gelis, Füsun Hacıeyüpoğlu, Hayriye Karadeniz, Ömür Önk, H. Çağatay Özdoğru, Yeşim Özlale, Oğuzcan Samsun, Matthieu Sejourne, Mehmet Tunçkanat, Başak Kural Uslu and Nazım Kemal Üre for their valuable insights and contributions as part of the report preparation.

July, 2025

Resumes

Armando GUASTELLA

Partner

Armando Guastella is a Partner at Bain & Company, with over 15 years of experience advising clients on strategy, innovation, technology, and transformation.

Armando has developed a strong track record at the intersection of sustainability and technology, supporting C-Suite leaders across Europe, Asia, and the Middle East in reimagining their businesses through advanced technologies. He brings deep expertise in digital transformation, artificial intelligence (AI), Generative AI, and machine learning, helping clients design and scale tech-enabled strategies that unlock long-term value and measurable ESG impact.

Throughout his career, he has led major programs across diverse industries—ranging from innovation acceleration and digital sustainability to ESG value creation, data-driven transformation, business model redesign, ecosystem strategy, and go-to-market planning. His approach combines strategic vision with a hands-on orientation to execution, ensuring impact at both the boardroom and operational levels.

Armando is a frequent speaker at technology and sustainability conferences, think tanks, and executive roundtables, and is regularly quoted in international media on how digital and AI are reshaping the future of responsible business. He is also one of the leaders of the firm's Sustainability & Responsibility practice.

He holds an MBA from Hult Business School, as well as an MSc in managerial engineering and a BSc in industrial engineering from the University of Rome La Sapienza.

Ersin SEÇKİN

Senior Manager

Ersin Seçkin is a Senior Manager at Bain & Company and an expert in innovation, digital transformation, and ESG topics, with deep experience supporting clients on growth, technology-driven transformation, and sustainability agendas.

He advises leading companies across a range of sectors on how to unlock long-term value through innovation-driven strategies, digital enablement, and ESG integration. Ersin works closely with senior executives to accelerate the adoption of emerging technologies—such as artificial intelligence and advanced analytics—while embedding sustainable practices and future-proofing their organizations in the face of rapidly evolving market and regulatory dynamics.

Throughout his career, Ersin has led several high-impact projects spanning ESG value creation, decarbonization strategies, product and business model innovation, AI-enabled operations, and ecosystem partnerships. He brings a rigorous strategic lens and a hands-on approach to implementation, helping clients turn bold ideas into measurable results.

Ersin holds a double major BSc in Industrial Engineering and Business Administration from Koç University. He is passionate about the intersection of sustainability and technology, and actively contributes to Bain's thought leadership on GenAI, digital innovation, and ESG transformation.

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Yönetici Özeti

TÜSİAD Dijital Stratejiler ve Yeni Teknolojiler Çalışma Grubu faaliyetleri kapsamında Bain & Company iş birliğinde hazırlanan **"Üretken Yapay Zekaya Hazır olmak: Yetenek, Liderlik ve Kültürel Dönüşüme Dair Perspektifler"** başlıklı rapor, üretken yapay zekanın (ÜYZ) iş dünyası üzerindeki etkilerini Türkiye perspektifiyle ele alıyor. Raporda; ÜYZ'ye geçişin yetenek, liderlik, kültürel dönüşüm ivmesi ve gelecek öngörüsü küresel eğilimlerin yanında Türkiye'den 135'in üzerinde üst düzey yöneticiyle yapılan anketler ve derinlemesine görüşmelerle destekleniyor.

Rapor, Türkiye'deki CEO'lar arasında ÜYZ'ye yönelik güçlü bir heyecan olduğunu ortaya koyuyor. Bununla birlikte, stratejik vizyon ile teknik hazırlıkların daha fazla örtüşmesini sağlamak önemli bir gelişim alanı olarak öne çıkıyor.

- CEO'ların %88'i ÜYZ'nin sektörleri dönüştüreceğine inanırken CTO'ların %30'u kurumlarının bu dönüşüme dair net bir yol haritasına sahip olduğunu belirtiyor.
- %95'lik bir oran ÜYZ'nin çalışan verimliliğini ve yetkinliklerini artıracağına inanıyor; ancak bu potansiyel çoğunlukla bireysel çabalarla hayata geçiyor.

Araştırmadan elde edilen bulgular, ÜYZ uygulamalarının henüz dönüşümsel olmadığını, başlangıç seviyesinde kaldığını gösteriyor:

- ÜYZ uygulamaları ağırlıklı olarak bilgi teknolojileri (%48) ve müşteri hizmetleri (%42) gibi destek fonksiyonlarında yoğunlaşmış durumda. Satış ve ürün geliştirme gibi ana iş birimlerinde entegrasyon halen sınırlı.
- ÜYZ'yi stratejik öncelik haline getiren şirketlerin çoğu kültürel hazırlık ve değişim yönetimi konusunda kararlı adımlar atıyor; bununla birlikte birçok organizasyon halen "bekle-gör" yaklaşımında.
- Bu alanda karşılaşılan en temel güçlüklerden biri yetenek arzının sınırlı olması. CTO ve CIO'lar için en kritik önceliklerden biri nitelikli ÜYZ yeteneklerine sahip insan kaynağına erişimi artırmak.

Yöneticilerle yapılan görüşmelerde, ÜYZ yetkinliklerinin çoğu şirkette küçük ve teknik ekiplerle sınırlı kaldığı; bununla birlikte, geniş çaplı benimsemenin psikolojik direnci kıracak farkındalığın artması ve eğitimle hız kazanabileceği belirtiliyor.

Türkiye, 2024–2025 Ulusal Yapay Zeka Eylem Planı kapsamında, yapay zeka alanında etkin iş gücünün artırılmasını, akademik insan kaynağı ve bilgi birikiminin güçlendirilmesini, Türkçe büyük dil modellerinin geliştirilmesini ve uluslararası yeteneklerin ülkeye çekilmesini önceliklendiriyor. Avrupa Birliği Yapay Zeka Yasası'yla uyumlu düzenlemeler de bu vizyonun ayrılmaz bir parçası olarak öne çıkıyor. 2030 Sanayi ve Teknoloji Stratejisi ile yapay zeka teknolojilerinin sanayi politikalarıyla entegrasyonu ve katma değerli üretimin artırılması hedefleniyor. Küresel ölçekte toplam 725 milyar dolarlık yapay zeka yatırımı gerçekleşirken Türkiye'nin 2019–2024 dönemindeki yapay zeka alanındaki yatırımı 0,5 milyar dolar düzeyinde. Yatırım alanında kamu, özel sektör ve akademinin iş birliği içinde atacağı somut ve stratejik adımlar, Türkiye'nin küresel yapay zeka ekosistemindeki konumunu güçlendirme yolunda kritik rol oynayacak.

Yönetici Özeti

Rapor, ÜYZ dönüşümünün başarıya ulaşması için yalnızca teknoloji yatırımlarının değil; kurum içi liderlik, organizasyon yapısı, yetenek yönetimi ve çalışma biçimlerinin de eş zamanlı dönüştürülmesi gerekliliğini vurguluyor. Dağınık ve birbirinden kopuk pilot projeler yerine, net bir vizyon çerçevesinde önceliklendirilmiş ve ölçeklenebilir adımlar atılması önemli görülüyor.

Buna göre şirketlerin ÜYZ yolculuğunda dört temel eksene odaklanması gerekiyor:

1. Değer odaklı önceliklendirme ve yol haritası

- ÜYZ yatırımlarının etkili olması için kurumlar, değer yaratma potansiyeli en yüksek kullanım alanlarını net şekilde tanımlamalı. Bu alanlar, yalnızca teknik uygunluk değil, aynı zamanda iş sonuçlarına katkı üzerinden değerlendirilmeli. Araştırmalar, toplam etkinin büyük oranda sınırlı sayıdaki uygulamadan geldiğini gösteriyor. Dolayısıyla geniş ve dağınık uygulama portföyleri yerine 5–10 adet yüksek öncelikli alana odaklanmak başarı için daha anlamlı bir yaklaşım sunuyor.

2. İş yapış biçimlerinin yeniden tasarımı

- ÜYZ'nin gerçek potansiyeli, yalnızca mevcut süreçlere entegre edilmesiyle değil, iş yapış biçimlerinin bu teknolojiye göre yeniden tasarlanmasıyla ortaya çıkıyor. Şirketler, ÜYZ destekli yeni çalışma modellerini tanımlamalı; karar alma, üretkenlik ve hizmet sunumu gibi alanlarda veri odaklılık ve hız kazandıran iş akışlarını benimsemeli. Bu adım, dönüşümün organizasyon genelinde benimsenmesini ve somut çıktılara ulaşılmasını sağlıyor.

3. Rollerin ve sorumlulukların yeniden tanımlanması ve yetkinliklerin kurumsal kapasite ile uyumlandırılması

- ÜYZ dönüşümünün başarısı, yalnızca teknik ekiplerin değil, organizasyonun tamamının bu dönüşüme hazır hale getirilmesiyle mümkün. Kurumlar, çalışan rollerini yeniden tanımlayarak yetkinlik haritalarını geleceğe uygun hale getirmeli ve fonksiyon bazlı eğitim programlarıyla bu boşlukları kapatmalı. Yetenek yönetimi artık sadece işe alım süreciyle sınırlı olmamalı; dönüşen ihtiyaçlara yanıt verecek bir gelişim mimarisine dönüşmeli.

4. Geleceğe hazır organizasyon yapısının bugünden inşası

- ÜYZ'nin ileriye dönük kurumsal etkisini sürdürülebilir kılmak için şirketlerin yönetişim modellerini, organizasyon yapılarını ve yetenek stratejilerini bugünden geleceğe yönelik şekilde yapılandırması gerekiyor. Bu noktada "gelecekten geriye planlama" yaklaşımı öne çıkıyor: Şirketler, 2–3 yıl içerisinde yaratmak istedikleri etki alanlarını netleştirmeli ve bu vizyona hizmet edecek adımları bugünden devreye almalı. Ölçeklenebilirlik, esneklik ve etik uyum, bu tasarımın temel unsurları arasında yer almalı.

CHAPTERS

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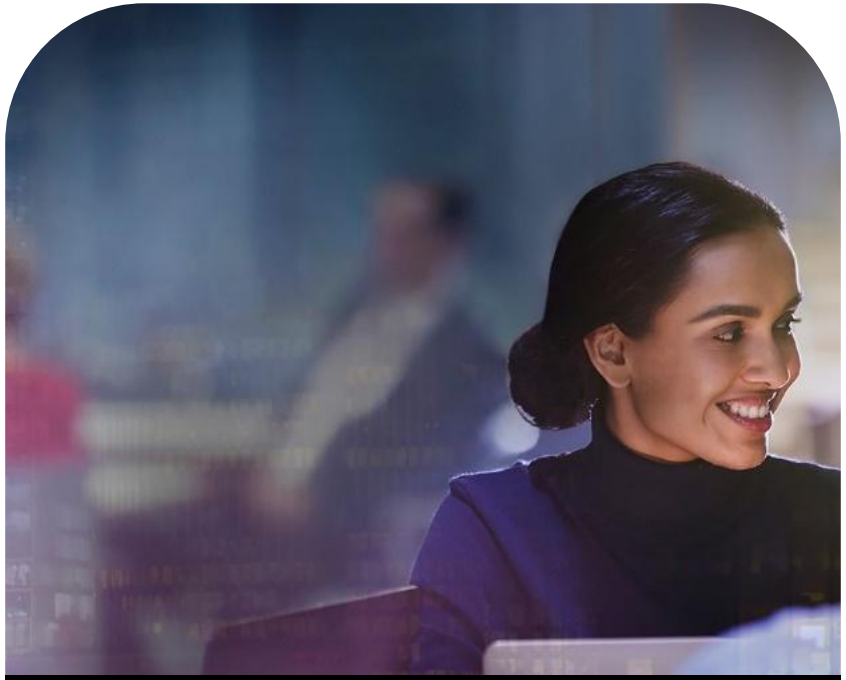
Developments in GenAI



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Developments in GenAI

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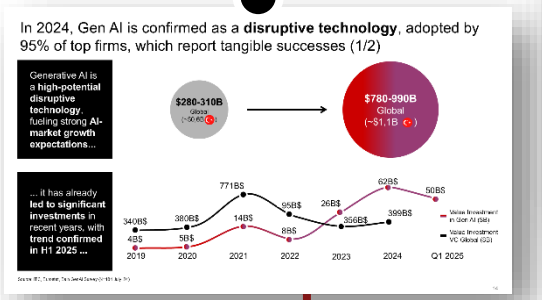
GenAI ready or not? Perspectives from Türkiye

Chapter 3

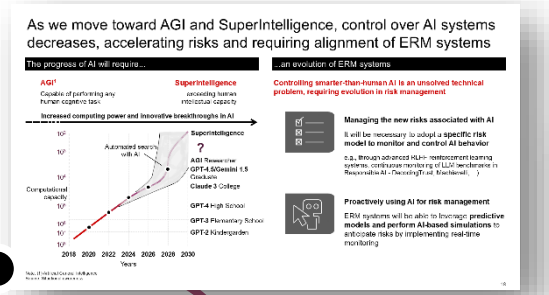
How to get ready for GenAI?

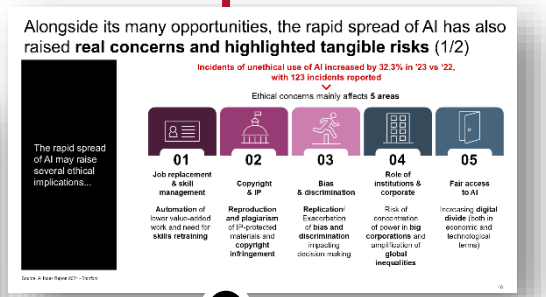
Why now?

In 2024, Generative AI has confirmed itself as a disruptive technology, adopted by 95% of top firms, showing tangible successes



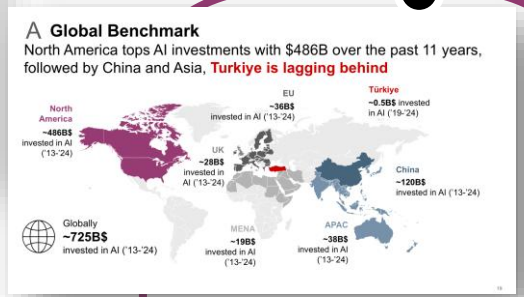
Controlling AI systems more intelligent than humans is an unresolved technical problem that requires **talent & workforce alignment**





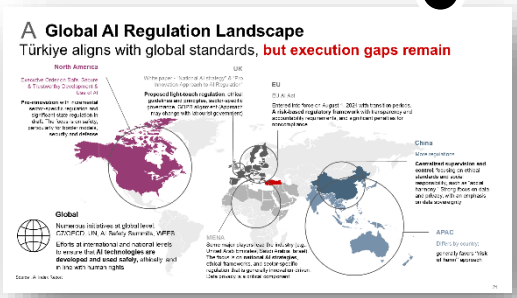
In addition to the numerous opportunities offered, the spread of AI has also raised concrete concerns and risks

On a global level, countries are advancing in terms of investments/laws: **US** ranks first in investments ~$346 billion over 10, followed by China and Asia, Türkiye is lagging behind



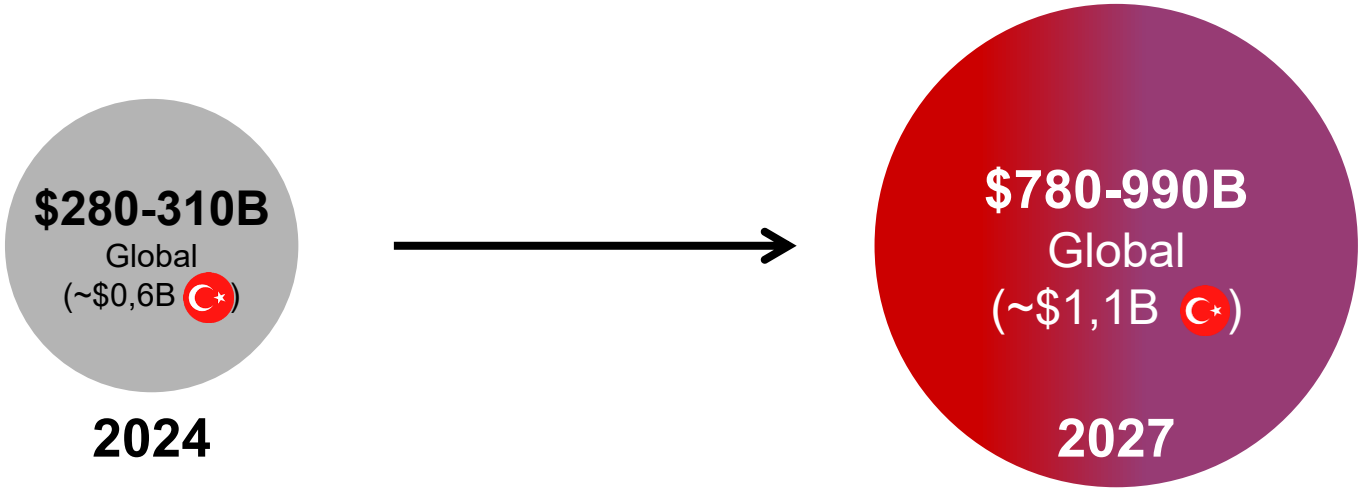
Faced with increasing risks, finding a sustainable balance between innovation and workforce impact is essential

Türkiye Aligns with global standards, but execution gaps remain, especially in talent upskilling

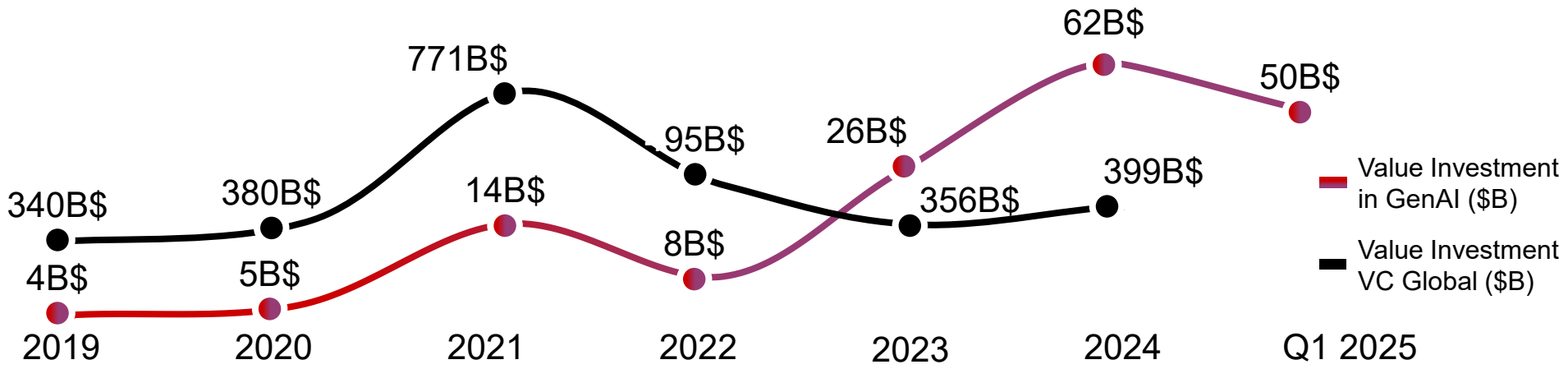


Global investments expected to grow significantly to reach ~900 B USD by 2027…

Generative AI is a **high-potential disruptive technology**, fueling strong **AI-market growth expectations...**



... it has already **led to significant investments** in recent years, with **trend confirmed in H1 2025 ...**



Source: ITC, Eurostat, Bain GenAI Survey (N=184 July '24)

…and Gen AI is confirmed as a **disruptive technology**, adopted by 95% of top firms, which report tangible successes

...and pushed **major top firms worldwide to adopt the technology**, with already extremely positive results

90% **rank** GenAI among the **top 5 strategic priorities**

95% **have already adopted/are adopting GenAI** for at least one use case

82% the percentage of times **GenAI met/exceeded expectations**

15% top firms perceived **productivity gains** along different use cases

10% **the perceived impact on the bottom line** (increased revenue/reduced costs)

Source: ITC, Eurostat, Bain GenAI Survey (N=184 July '24)

Alongside its many opportunities, the rapid spread of AI has also raised **real concerns…**

The rapid spread of AI may raise several ethical implications...

Incidents of unethical use of AI increased by 32.3% in '23 vs ‘22, with 123 incidents reported

Ethical concerns mainly affects **5 areas**

01

Job replacement & skill management

Automation of lower value-added work and need for **skills retraining**

02

Copyright & IP

Reproduction and plagiarism of IP-protected materials and **copyright infringement**

03

Bias & discrimination

Replication/ Exacerbation of **bias and discrimination** impacting decision-making

04

Role of institutions & corporate

Risk of concentration of power in **big corporations** and amplification of **global inequalities**

05

Fair access to AI

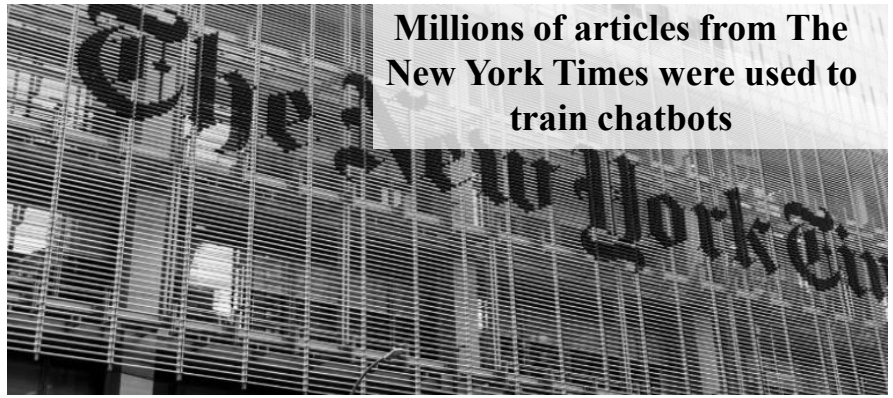
Increasing **digital divide** (both in economic and technological terms)

Source: AI Index Report 2024 - Stanford

…and highlighted tangible risks

…that materialize into real horror stories

Copyright



Deepfake

US Election 2024: The Role of Deepfakes on Social Media

As the race for the White House between Trump and Democratic candidate Kamala Harris intensifies, disinformation experts are sounding the alarm about the risks of generative AI

3 September 2024, Panorama

Imagine if the deepfake altered a tender process, forging promises or reports and compromising the integrity of the supplier selection process

Stop innovation? Absolutely not, but promote awareness and guidelines...

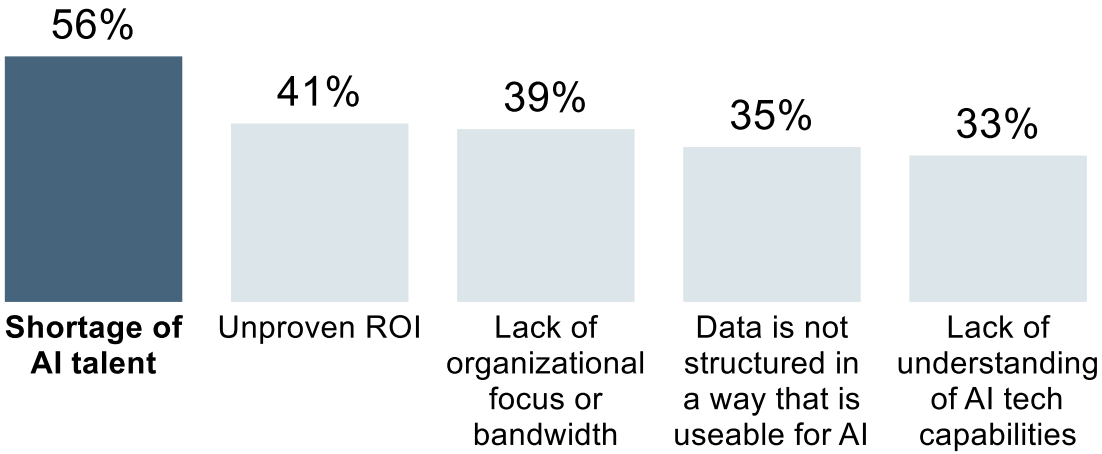
Source: AI Index Report 2024 - Stanford

In parallel, **shortage of AI talent is real** and **gap between leaders and laggards is large**

75% of companies report being "under capacity" in AI talent, rising to **79%** for technical roles

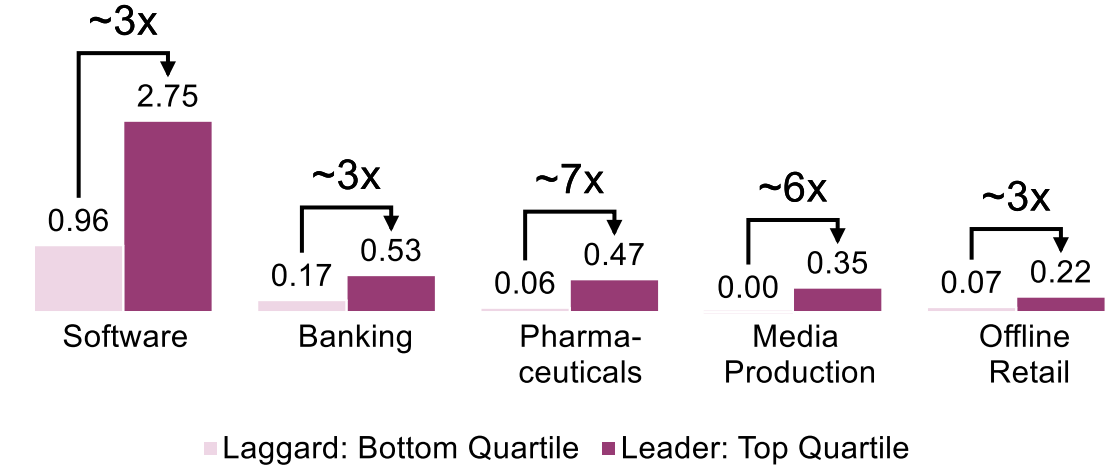
Shortage of talent is the #1 roadblock to firms' AI journey

What are the top reasons holding your company back from adopting more AI?
% of Respondents (N=470)



Leaders already have ~3x+ greater AI skills vs. laggards

Distribution of AI skills in workforce in select industries[1]
(% of employees)



Maximizing the value of AI requires **rethinking and redesigning the most impacted processes**, with a focused approach on a **short list of high-impact priorities**

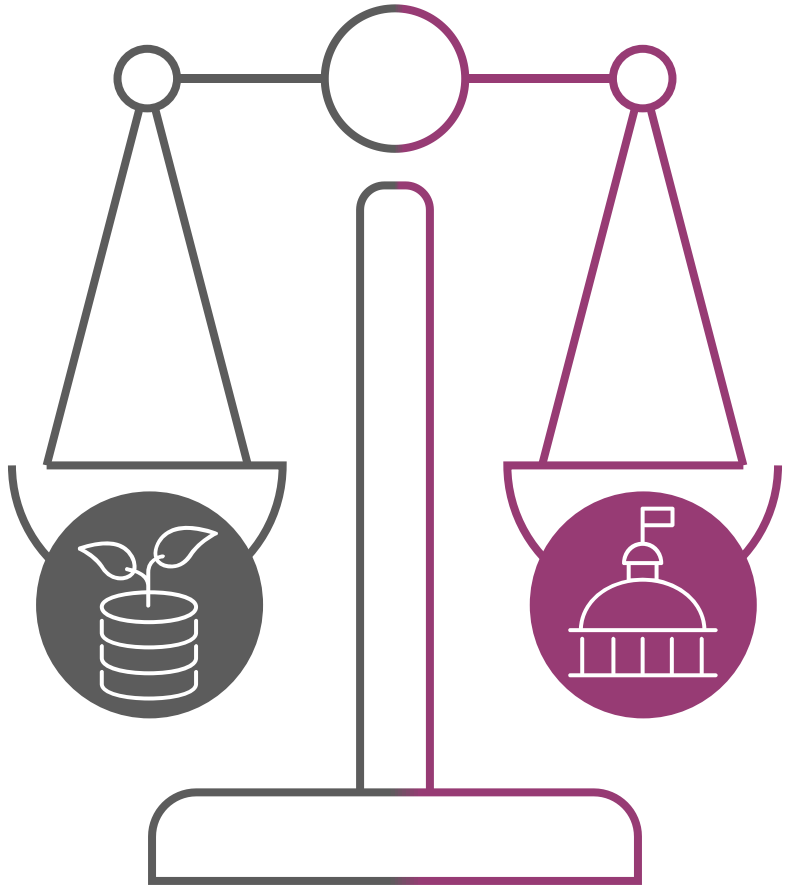
Note: 1) Respondents answering "I don't know" have been excluded from the totals above | Source: Bain GenAI Survey (N=195 Jul'24), 2023 Bain AI Survey; N = 571

In the face of increasing risks, striking a sustainable balance between innovation and impact on the workforce is a must

A

Accelerating **innovation and investment**...

is imperative to advance **research and development of AI** technology and **catalyze innovation** across sectors, accelerating **country's growth** and **competitiveness** in the international arena



B

...with an **approach** that prepares the workforce and mitigates risks

Adopting a forward-looking regulatory and capability-building agenda is needed to enable **institutional capacity for AI oversight and workforce transformation,** including talent upskilling and reskilling to ensure readiness for AI-augmented roles

"AI Impact on Culture and Workforce"

As we move toward AGI and SuperIntelligence, control over AI systems decreases, accelerating risks and requiring alignment of ERM systems

The progress of AI will require...

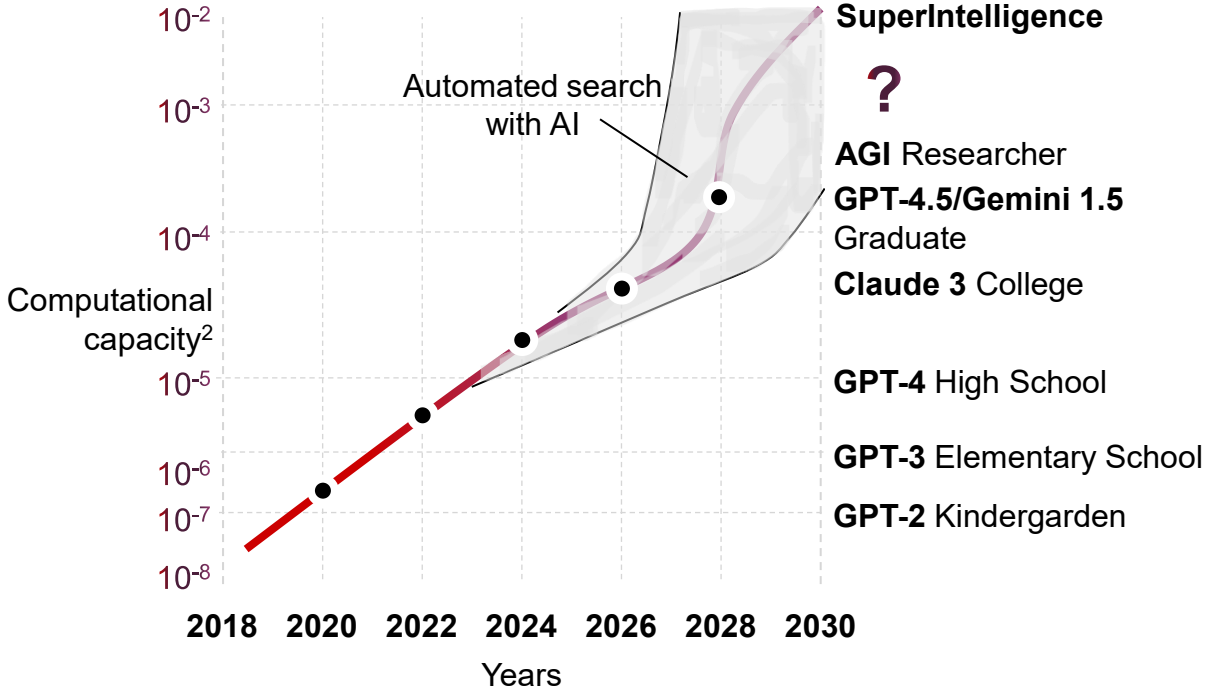
AGI[1]

Capable of performing any human cognitive task

SuperIntelligence

exceeding human intellectual capacity

Increased computing power and innovative breakthroughs in AI



...an evolution of ERM systems

Controlling smarter-than-human AI is an unsolved technical problem, requiring evolution in risk management

Managing the new risks associated with AI

It will be necessary to adopt a **specific risk model to monitor and control AI behavior**

e.g., through advanced RLHF reinforcement learning systems, continuous monitoring of LLM benchmarks in Responsible AI - DecodingTrust, Machiavelli, ...)

Proactively using AI for risk management

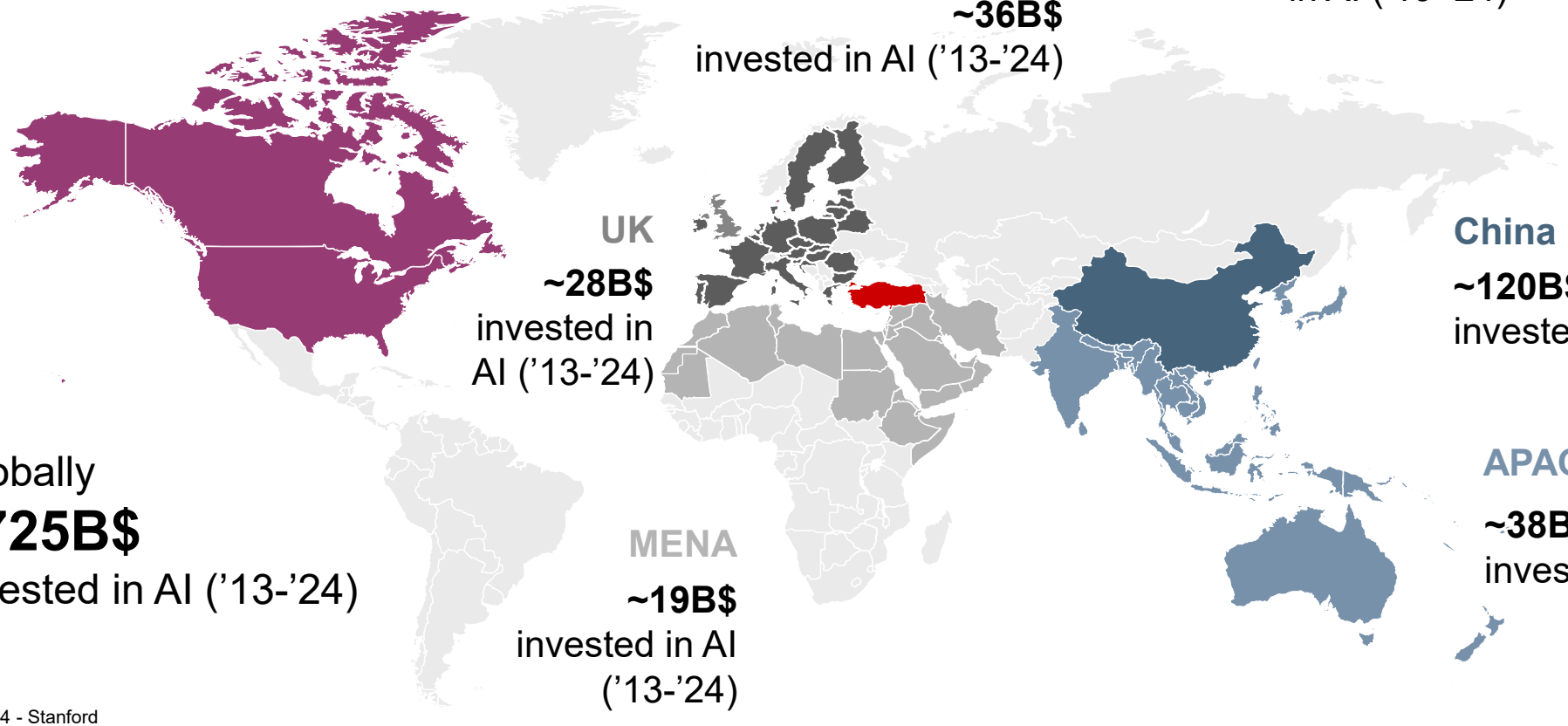
ERM systems will be able to leverage **predictive models and perform AI-based simulations** to anticipate risks by implementing real-time monitoring

Note: (1) Artificial General Intelligence (2) Rough estimates of past and future scaleup of effective compute (both physical compute and algorithmic efficiencies), based on the public estimates discussed in this piece. As we scale models, they consistently get smarter, and by "counting the OOMs we get a rough sense of what model intelligence we should expect in the (near) future

Source: Situational awareness from GPT-4 to AGI

A Global Benchmark

North America tops AI investments with $486B over the past 11 years, followed by China and Asia, **Türkiye is lagging behind**



North America

~486B$
invested in AI
('13-'24)

EU

~36B$
invested in AI ('13-'24)

Türkiye

~0.5B$ invested
in AI ('19-'24)

UK

~28B$
invested in
AI ('13-'24)

China

~120B$
invested in AI ('13-'24)

APAC

~38B$
invested in AI ('13-'24)

MENA

~19B$
invested in AI
('13-'24)

Globally
~725B$
invested in AI ('13-'24)

Source: AI Index Report 2024 - Stanford

A Global AI Regulation Landscape

Türkiye aligns with global standards, **but execution gaps remain**

North America

Executive Order on Safe, Secure & Trustworthy Development & Use of AI

Pro-innovation with incremental sector-specific regulation and significant state regulation in draft. The focus is on safety, particularly for border models, security and defense

UK

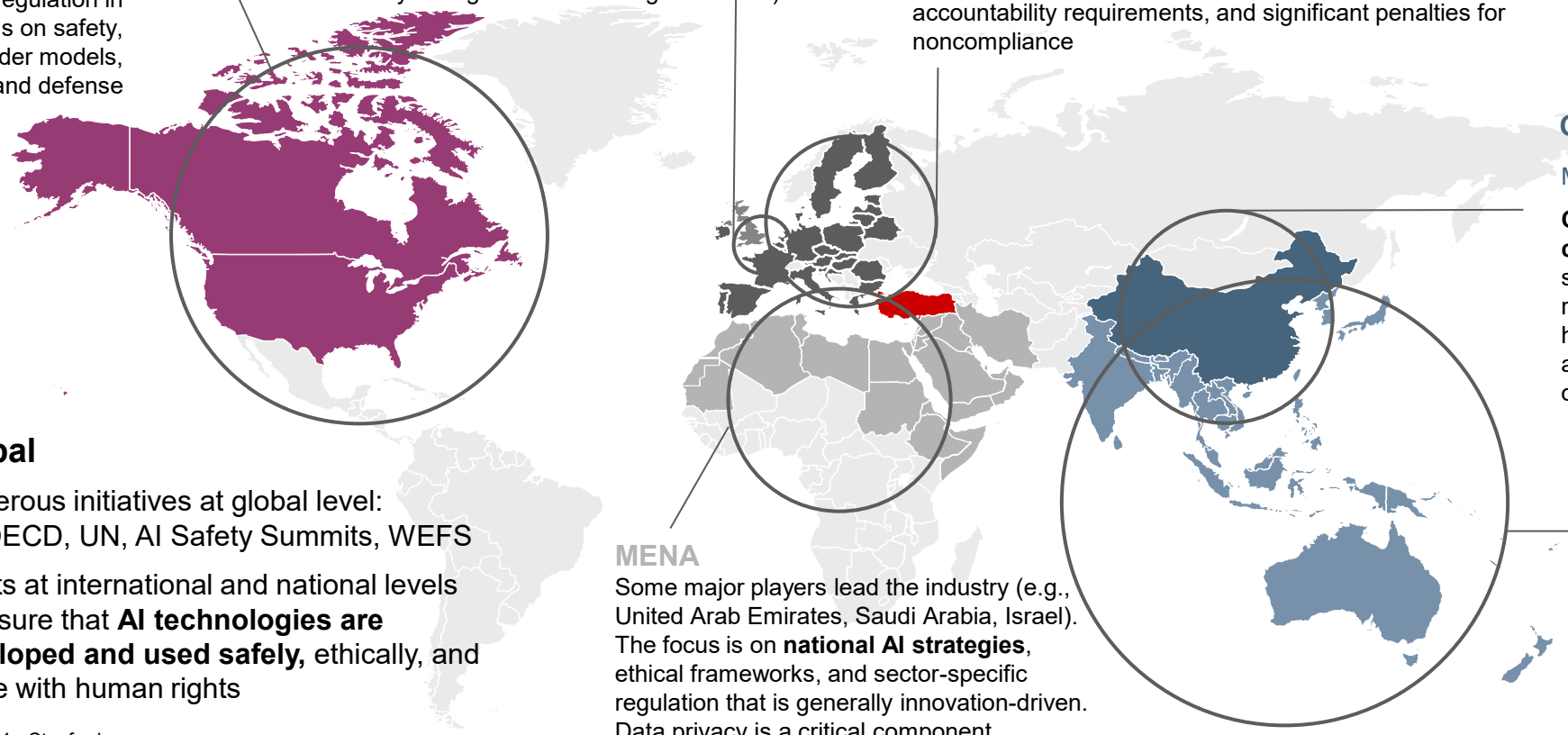
White paper - "National AI strategy" & "Pro Innovation Approach to AI Regulation"

Proposed light-touch regulation, ethical guidelines and principles, sector-specific governance, GDPR alignment (Approach may change with labourist government)

EU

EU AI Act

Entered into force on August 1, 2024 with transition periods. **A risk-based regulatory framework** with transparency and accountability requirements, and significant penalties for noncompliance



China

More regulations

Centralized supervision and control, focusing on ethical standards and social responsibility, such as "social harmony." Strong focus on data and privacy, with an emphasis on data sovereignty

Global

Numerous initiatives at global level: G7/OECD, UN, AI Safety Summits, WEFS

Efforts at international and national levels to ensure that **AI technologies are developed and used safely,** ethically, and in line with human rights

MENA

Some major players lead the industry (e.g., United Arab Emirates, Saudi Arabia, Israel). The focus is on **national AI strategies**, ethical frameworks, and sector-specific regulation that is generally innovation-driven. Data privacy is a critical component

APAC

Differs by country;

generally favors **"risk of harm"** approach

Source: AI Index Report 2024 - Stanford

A Global AI Regulation Landscape

Türkiye aligns with global standards, but execution gaps remain

Türkiye

National AI Strategy 2021-25
National AI Strategy 2024-25 Action Plan
2030 Industry and Technology Strategy

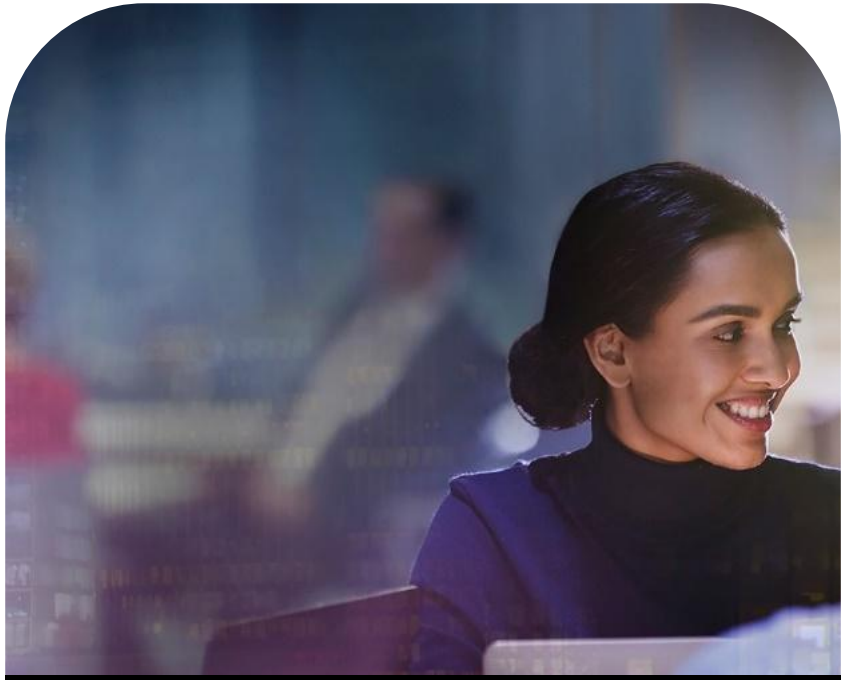
Türkiye published 2024–2025 AI Action Plan, which focuses on developing **Turkish large language models** and **attracting global AI talent**. It also aims to **align national regulations with international standards**, including the EU AI Act

Source: AI Index Report 2024 - Stanford

Chapter II

Chapter 1 >

Developments in GenAI



Chapter 2 >

GenAI ready or not? Perspectives from Türkiye

Chapter 3

How to get ready for GenAI?

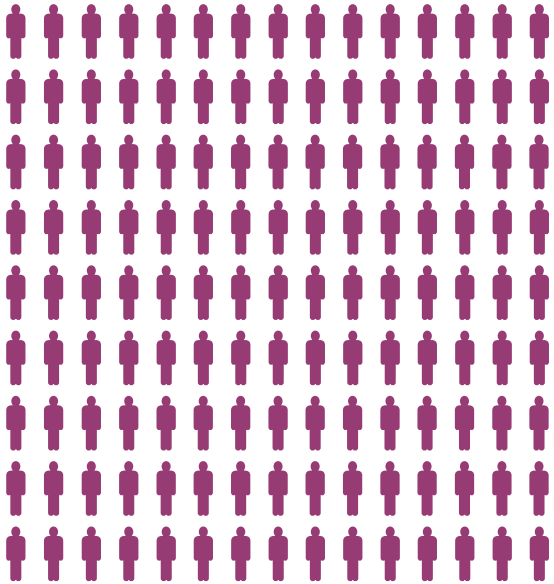
Insights on GenAI readiness and risks were shaped by **input from 135+ Turkish executives** through surveys and interviews

Bain & TÜSİAD joint perspectives

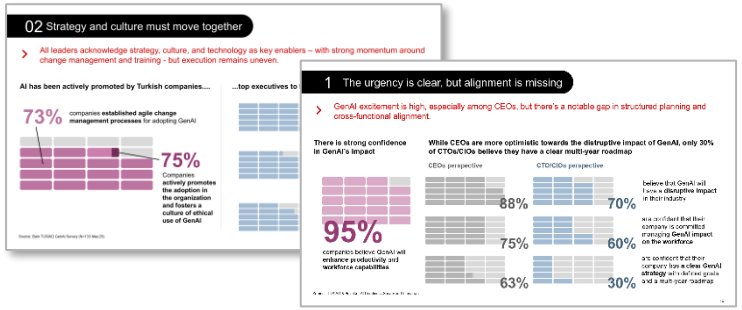
BAIN & COMPANY TÜSİAD

GenAI Readiness Survey

~135 executives surveyed

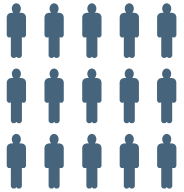


Pulse Check on **C-Levels/Executives** of Turkish companies (in the range of 500 and 25k employees) to assess **AI readiness**, gap-to-fill for AI adoption, and **AI ethical maturity**

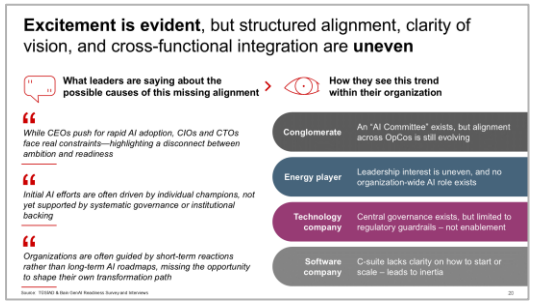


1-1 Executive Interviews

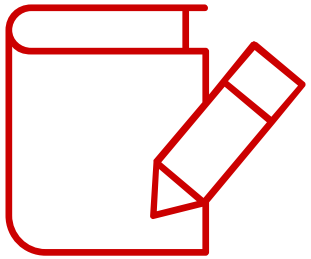
15+ executives interviewed



Pulse Check on a sample of **executives** to assess adoption of **AI in their companies, impact on workforce and culture**



5 themes emerging from the study



1 The urgency is clear, but alignment is missing

GenAI excitement is high, especially among CEOs, but there's a notable gap in structured planning and cross-functional alignment.

2 Strategy and culture must move together

All leaders acknowledge strategy, culture, and technology as key enablers – with strong momentum around change management and training - but execution remains uneven.

3 Adoption is tactical, not transformational (yet)

Most GenAI applications focus on IT and customer service. The broader potential to reshape core business functions remains largely untapped

4 Talent is both the trigger and the bottleneck

Talent scarcity is one of the biggest barriers. Organizations must proactively invest in developing GenAI capabilities to unlock full impact.

5 Strategic ambition must meet technical reality

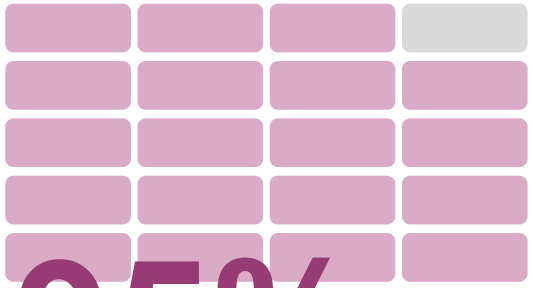
While CEOs are optimistic, tech leaders are more cautious about the readiness of current systems to deliver on this ambition. Misaligned perceptions of risks further hinder execution

Source: TÜSİAD & Bain GenAI Readiness Survey and Interviews

1 The urgency is clear, but alignment is missing

GenAI excitement is high, especially among CEOs, but there's a notable gap in structured planning and cross-functional alignment.

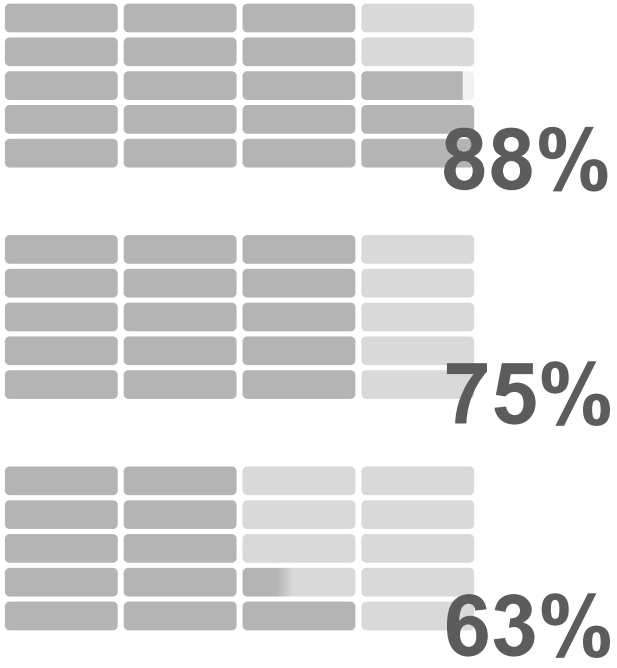
There is strong confidence in GenAI's impact



95%

companies believe GenAI will **enhance productivity** and **workforce capabilities**

While CEOs are more optimistic towards the distruptive impact of GenAI, only 30% of CTOs/CIOs believe they have a clear multi-year roadmap



believe that GenAI will have a **disruptive impact** in their industry

are confident that their company is committed managing **GenAI impact on the workforce**

are confident that their company has **a clear GenAI strategy** with defined goals and a multi-year roadmap

Source: TÜSİAD & Bain GenAI Readiness Survey and Interviews

Excitement is evident, but structured alignment, clarity of vision, and cross-functional integration are **uneven**

What leaders are saying about the possible causes of this missing alignment

How they see this trend within their organization

While CEOs push for rapid AI adoption, CIOs and CTOs face real constraints—highlighting a disconnect between ambition and readiness

Initial AI efforts are often driven by individual champions, not yet supported by systematic governance or institutional backing

Organizations are often guided by short-term reactions rather than long-term AI roadmaps, missing the opportunity to shape their own transformation path

Conglomerate	An “AI Committee” exists, but alignment across OpCos is still evolving
Energy player	Leadership interest is uneven, and no organization-wide AI role exists
Technology company	Central governance exists, but limited to regulatory guardrails – not enablement
Software company	C-suite lacks clarity on how to start or scale – leads to inertia

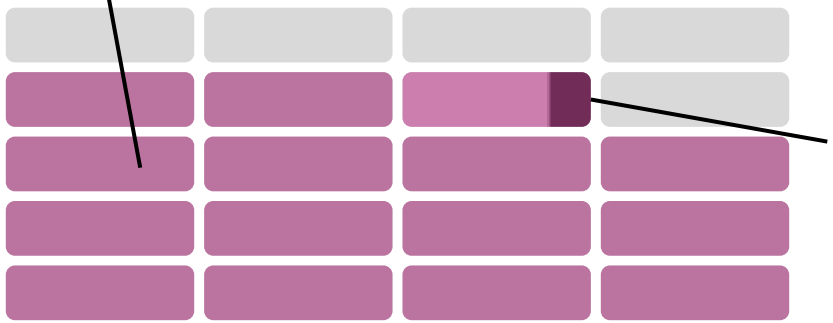
Source: TÜSİAD & Bain GenAI Readiness Survey and Interviews

2 Strategy and culture must move together

› All leaders acknowledge strategy, culture, and technology as key enablers – with strong momentum around change management and training - but execution remains uneven.

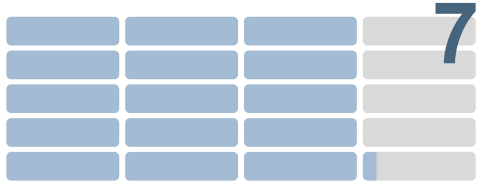
AI has been actively promoted by Turkish companies....

73% companies **established agile change management processes** for adopting GenAI

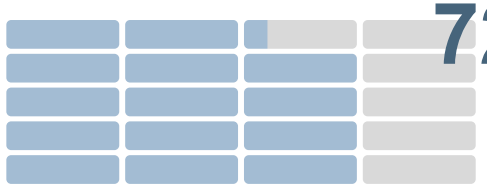


75% Companies **actively promotes the adoption in the organization and fosters a culture of ethical use of GenAI**

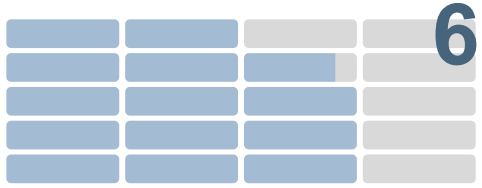
...top executives to foster GenAI adoption are...



76% defining a clear GenAI strategy



72% ensuring cultural readiness for change



68% providing adequate technological infrastructure

Source: TÜSİAD & Bain GenAI Readiness Survey and Interviews

Cultural inertia and inconsistent executive messaging **slow down execution**—even when strategic intent exists

What leaders are saying about the possible causes of this missing alignment

How they see this trend within their organization

Without a compelling narrative from leadership, AI efforts lack purpose and fail to inspire broad organizational engagement

"Wait-and-see" culture dominates AI adoption at the moment - teams adopt only when benefits are proven

Attempts at culture change lack reinforcement—AI adoption isn't supported by consistent communication or incentives

Regional energy player	Resistance delays adoption until ROI is visible
Conglomerate	Culture is the most cited barrier—agility and governance lacking
Apparel retailer	Continuous learning is present, yet misalignment persists across functions
Global equipment manuf	Using internal champions and localized use cases help drive adoption

Source: TÜSİAD & Bain GenAI Readiness Survey and Interviews

3 Adoption is tactical, not transformational (yet)

› Most GenAI applications focus on IT and customer service. The broader potential to reshape core business functions remains largely untapped

GenAI is believed to augment the workforce by…

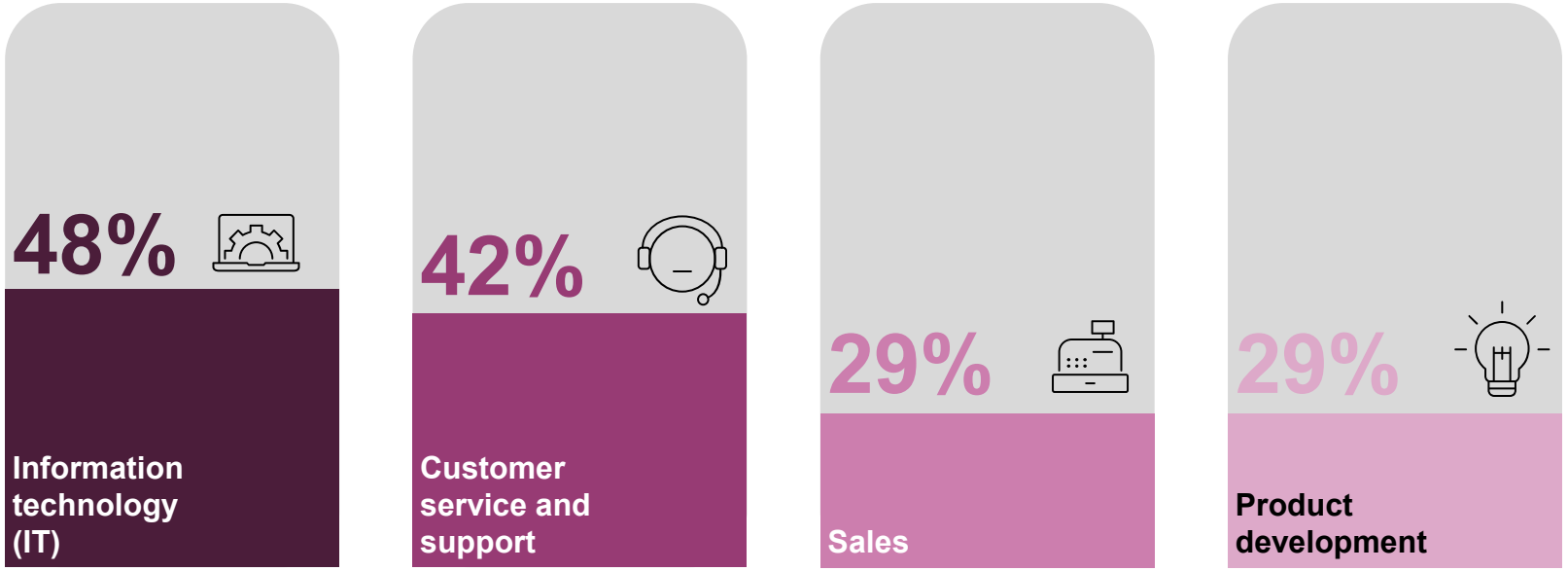
90%
increasing **efficiency** and **time optimization**

78%
supporting **data-driven** decision-making and problem-solving

66%
reducing errors and improving **accuracy**

27%
upskilling employees through training and development

…however, AI remains primarily concentrated on the IT and customer service functions within organizations



AI adoption in other business functions is significantly lower in priority, **with only about 20–23%** of organizations focusing on these areas

Source: TÜSİAD & Bain GenAI Readiness Survey and Interviews

GenAI remains a **tactical efficiency lever rather than a transformative force** to define new business models

What leaders are saying about the possible causes of this missing alignment

How they see this trend within their organization

Cautious spending and risk sensitivity push organizations toward incremental AI applications rather than strategic bets

In the absence of a strategic selection model, AI efforts remain fragmented and fail to target transformational value

GenAI is still seen as just an IT project, not a way to change the business

Regional energy player	AI seen as a tool for operational efficiency, not core change and resistance delays adoption until ROI is visible
Conglomerate	7,200+ co-pilots deployed, but mostly to embed into existing flows
Apparel retailer	Focused on micro-uses like product descriptions, not enterprise process redesign
Fintech player	ROI-centric use case selection limits bold moves

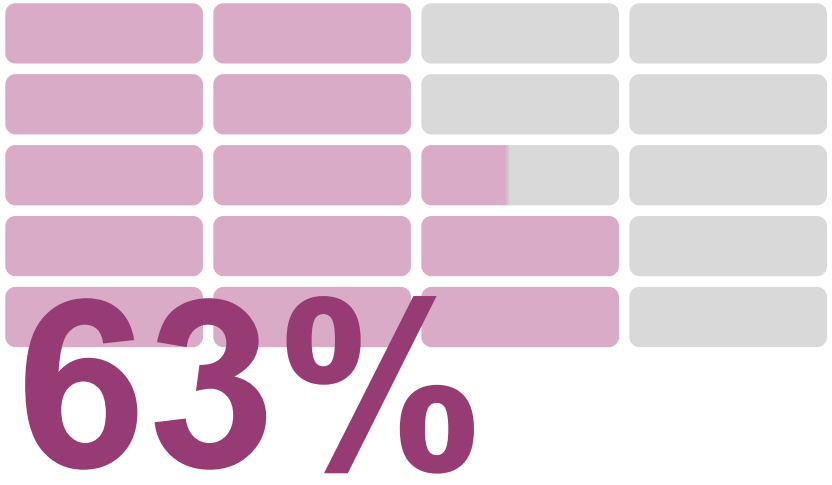
Source: TÜSİAD & Bain GenAI Readiness Survey and Interviews

4 Talent is both the trigger and the bottleneck

Talent scarcity is one of the biggest barriers. Organizations must proactively invest in developing GenAI capabilities to unlock full impact

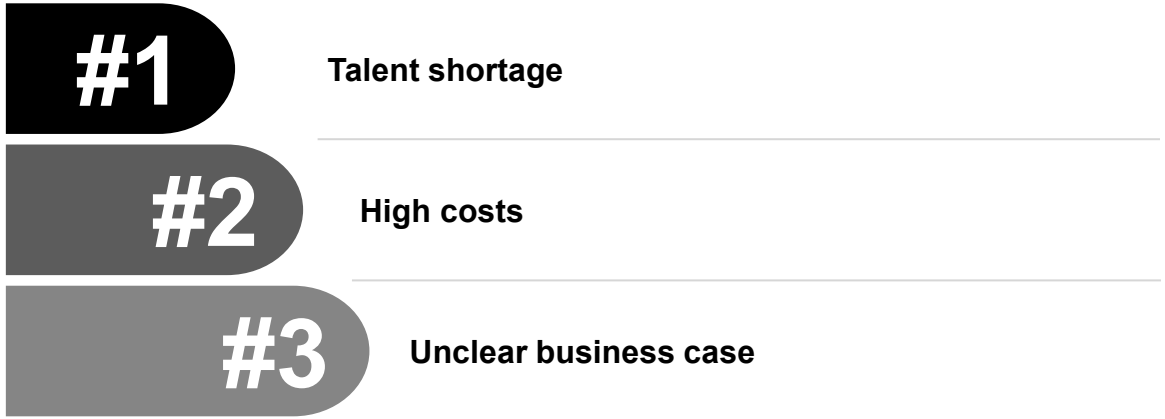
Skill demand remains a key barrier for GenAI adoption

Talent remains a **key hurdle** for GenAI adoption, with most companies **unsure or unconvinced** about their readiness to meet skills demand



Talent shortage is the primary concern for CTOs/CIOs

What concerns CTOs/CIOs?



> *When it comes to actively deploying GenAI, talent is the biggest question mark—even more critical than cost or the business case*

CTO

Source: TÜSİAD & Bain GenAI Readiness Survey and Interviews

GenAI success **depends on empowering the entire workforce**—not just the technical teams

What leaders are saying about the possible causes of this missing alignment

How they see this trend within their organization

The scarcity and cost of AI talent—particularly beyond technical teams—pose major scaling challenges for organizations

Conglomerate	Created an AI Academy for widespread upskilling
Energy player	Talent is concentrated in a 10–12 person team; scaling is a major challenge

Psychological resistance—rooted in uncertainty and fear—remains a major barrier to widespread AI adoption

Industry technology player	Upskilling via converting technical experts into data-savvy users

Generic training fails to drive adoption—teams need role-specific learning paths to activate AI potential

Source: TÜSİAD & Bain GenAI Readiness Survey and Interviews

5 Strategic ambition must meet technical reality

› While CEOs are optimistic, tech leaders are more cautious about the readiness of current systems to deliver on this ambition. Misaligned perceptions of risks further hinder execution

CEOs are more optimistic than tech leaders

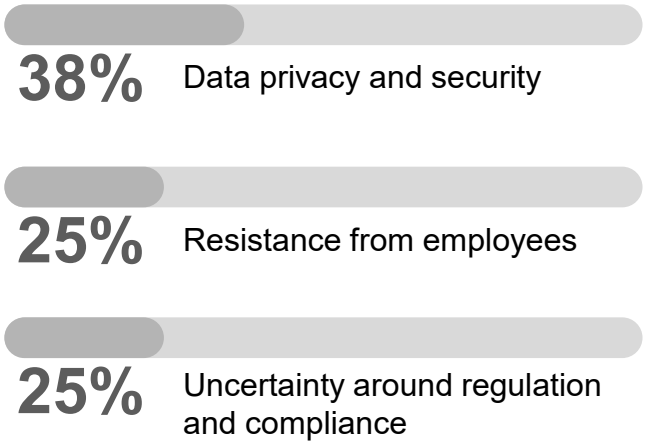
Δ+18%
more CEOs than CTOs/CIOs believe GenAI will have a disruptive industry impact

Δ+15%
more CEOs feel confident about managing GenAI's workforce impact.

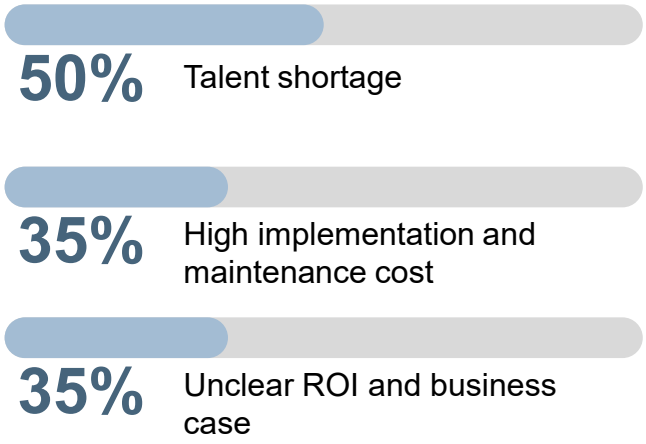
Δ+33%
more CEOs say their company has a clear GenAI strategy and roadmap

Talent shortage is the primary concern for CTOs/CIOs

What concerns CEOs?



What concerns CTOs/CIOs?



> *Our approach to GenAI is deliberate and grounded. From field teams to boardrooms, we are building a culture of continuous learning, embedding AI where it drives value—not just hype*

Chief Digital Officer

Source: TÜSİAD & Bain GenAI Readiness Survey and Interviews

There's a **risk of over-promising and under-delivering** unless tech foundations, data quality, and governance structures are matured in parallel with ambitions

What leaders are saying about the possible causes of this missing alignment

How they see this trend within their organization

> *AI adoption is constrained by regulatory risk and the limitations of legacy infrastructure.*

> *Business leaders see AI as a chance to grow, but tech leaders are more focused on the risks*

> *Without unified governance and ethical frameworks, AI use remains fragmented and exposes the organization to operational and reputational risks*

Conglomerate	Legal, Finance, and Compliance sit on the AI Committee to ensure feasibility
Technology company	Central governance helps risk management
Software company	Data quality, infra gaps, and regulatory ambiguity are still unaddressed

Source: TÜSİAD & Bain GenAI Readiness Survey and Interviews

Chapter III

Chapter 1 >

Developments in GenAI

Chapter 2 >

GenAI ready or not? Perspectives from Türkiye

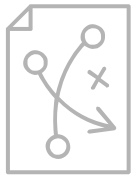
Chapter 3

How to get ready for GenAI?

Managing the Shift: 4 Steps to Scale GenAI with Talent and Purpose

Identify and implement high-value GenAI use cases

Quantify the potential for productivity gains, **prioritize the highest-value GenAI use cases, and** identify tools best fit tools



Redesign ways of working to drive adoption & value

Ensure adoption of GenAI use cases and maximize value capture by **rethinking how the work gets done**

Reshape roles to align talent with high-impact work

Realign roles to ensure talent focuses on high-value tasks, maximizing the impact of GenAI solutions

Define workforce and organization to meet future needs

Build **long-term view of talent and skills** needed and explore broader org design changes based on strategic needs and evolution of genAI applications

Shorter term solutions → Longer term solutions

Our approach to AI/GenAI-driven transformation comprises four components that need to be orchestrated to deliver full potential

1 **"Think Big"–**
Target vision & roadmap

Key success factor

Set a visionary ambition of what a Digital & AI/GenAI enabled future would look like, informed by industry trends/direction

2 **"Start Small"–Use cases & business cases**

Focus on realizing value right from the start, select most value driving use cases and scale up continuously

Develop Use Cases–**discrete but scalable areas** where AI/GenAI can solve a problem & demonstrate value

"Scale Fast"–Digital and AI/GenAI enablers

Lay the foundation for a sustainable change and build the internal Digital & AI/GenAI muscle

3 **Operating model**

Set up operating structure, recruit & retain scarce **talent**, embrace **accountability**, align skills and performance management **with decision making at front-line**

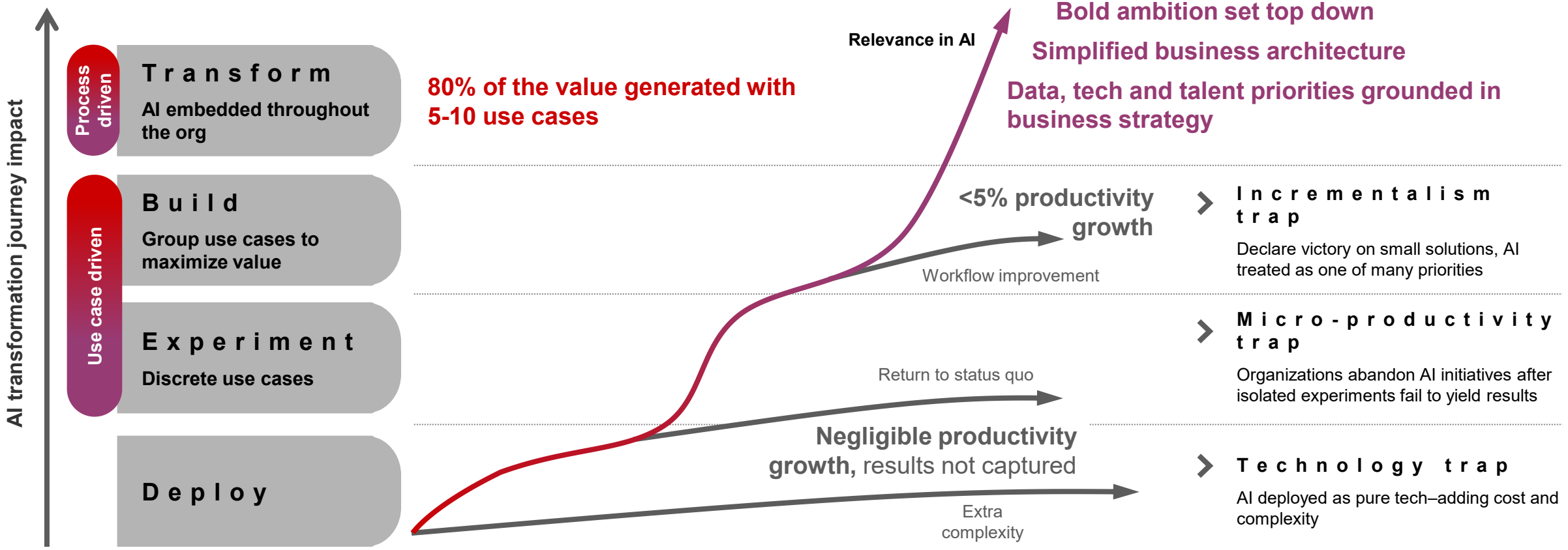
4 **Tech rollout**

Definition of key activities and their scheduling to plan implementation

Orchestration, change management & talent/skills

Define dedicated governance to address hard and soft blocks–build leadership alignment, mobilize talent, build capability and define KPIs and drumbeat

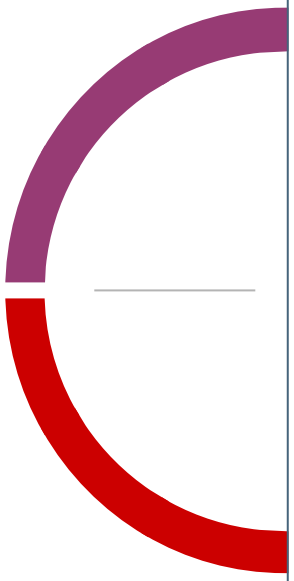
It is critical to apply a strategic approach to AI, avoiding common pitfall of pursuing numerous disconnected use cases without a clear overarching vision



Maximizing the value of AI requires **rethinking and redesigning the most impacted processes**, with a focused approach on a **short list of high-impact priorities**

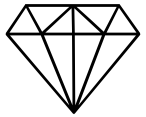
Future-Back GenAI strategies are informed by thoughtful strategic postures

Strategic postures



Exam questions

Today-forward



"Let's first prove the ROI"

Cautious approach seeking clear demonstration of value and signals of existing, matured adoption from within the industry (1-2 initiatives, incremental/efficiency-focused)

Where can we **demonstrate value** with low investment?

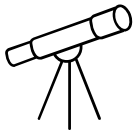
Where in the org is the most energy/**buy-in to begin?**

"Let's pilot in a few areas to experiment"

Openness to experiment with a few mid-scale pilots, particularly on more conservative internal/enabling initiatives (likely innovation/labs driven, limited to no growth focus)

What do we **need to believe/prove** as an organization?

Which initiatives will provide the required learnings and what is our **bar for success?**



"We're going big, but starting with focus"

Stated commitment to generative AI/acknowledge-ment of potential value (single BU focus to demonstrate value before exploring bolder plays, mixed efficiency/growth focus)

Which BU is **most likely drive/**demonstrate success?

How do we measure/ translate success to **build momentum?**

Future-back

"Fully ready to be bold"

Commitment to future-back transformational plays, incl. new-to-world value propositions; desire to accelerate efforts to deploy (portfolio of efficiency/growth initiatives across 2-3 BUs)

What is our **GenAI ambition/**where are we **best positioned to be bold?**

Which pilots will provide the **stepping-stones to success?**

Future-Back ideation should encompass both short and long-term use cases

Value creation areas & long-list

Map and **prioritize the areas where GenAI** can have significant impact inside your organization

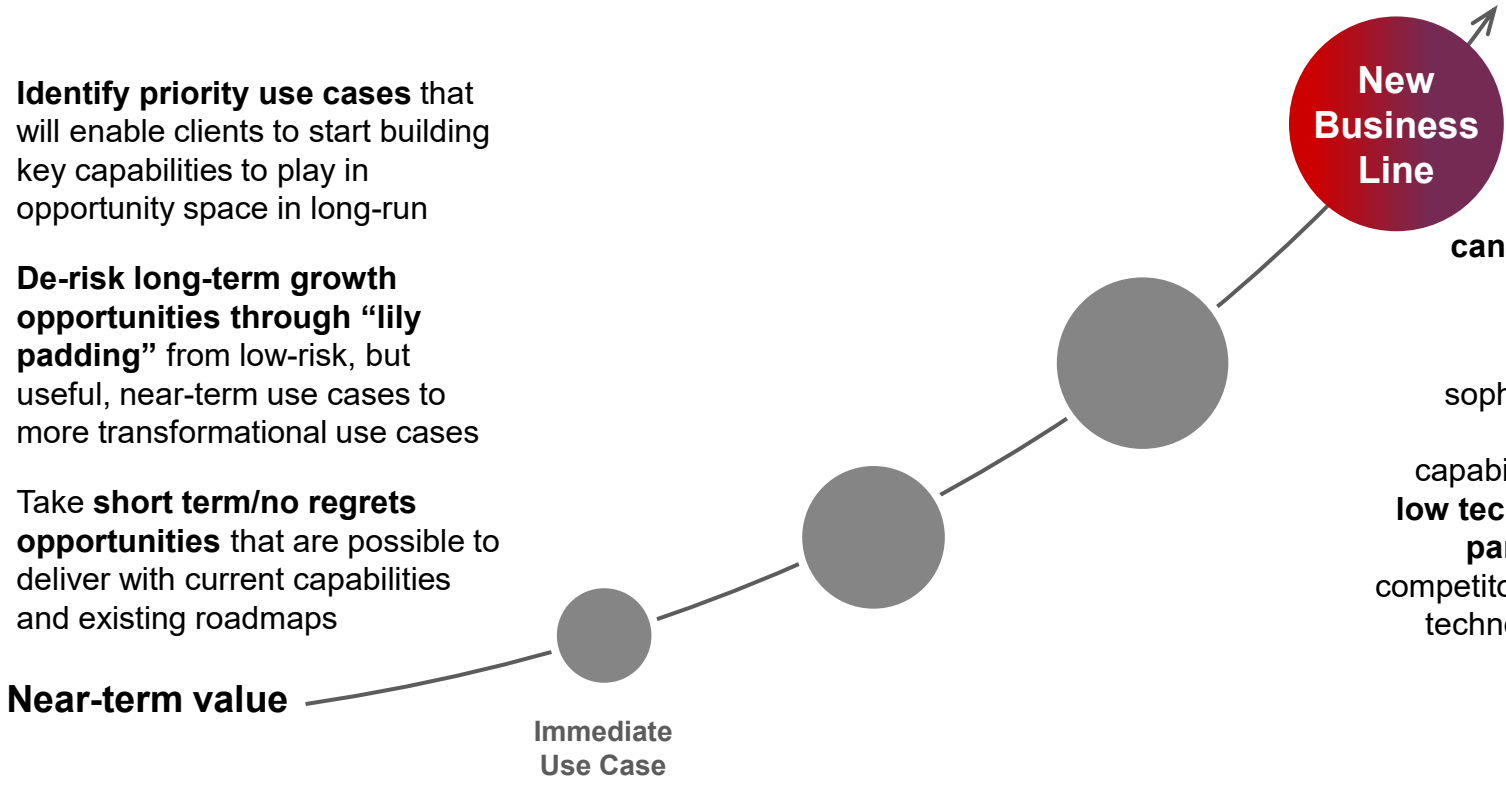
Prepare a long list of potential use cases, leveraging a future-back perspective to identify new opportunities

A future-back approach entails **identifying transformational future opportunities** and then defining near term **use cases to build towards those goals**

Identify priority use cases that will enable clients to start building key capabilities to play in opportunity space in long-run

De-risk long-term growth opportunities through "lily padding" from low-risk, but useful, near-term use cases to more transformational use cases

Take **short term/no regrets opportunities** that are possible to deliver with current capabilities and existing roadmaps

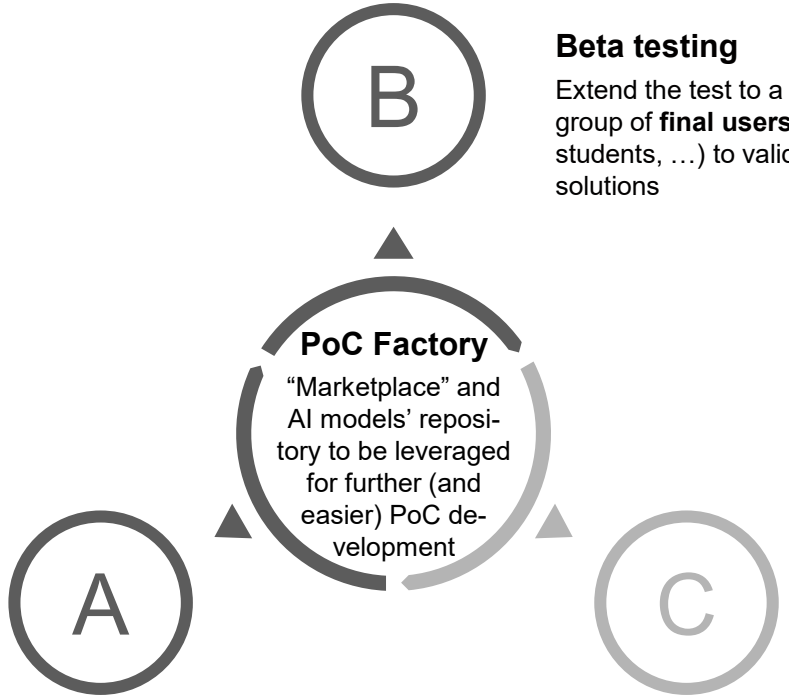


Long-term growth

Identify **longer term growth opportunities (3+ years)** in future-back opportunity spaces that **can create transformational new business lines**

These projects may be sophisticated and **complex to deliver today** (reliant on capabilities be developed), have **low tech feasibility**, and be **only partially defined to-date** as competitor landscape and enabling technologies continue to evolve

To successfully proceed along the AI transformation, it's necessary to set-up a "PoC factory" to rapidly test and validate the initiatives before scaling them



Beta testing

Extend the test to a selected group of **final users** (e.g., students, …) to validate the solutions

Discovery, Design & PoC

Based on the strategic intent, develop/implement a **PoC** to **preliminary** assess the **"size of** the **price"**

Scale-up

Roll-out the winning solution to other **areas involved** (e.g., other courses, ..) and communicate the initiative to final users

Activity in which the PoC factory is not "owner" but provide a support to enable the scale up

Pop factory **operating model**

Pop factory **key success factors**

A strong interaction with the Business is key to succeed, across the whole implementation journey: Use Cases identification, PoC/Testing and Scale-Up phases

Clear (and shared) KPIs are mandatory to both estimate Use Cases Size-of-the-Prize and to decide for/ monitor the Scale-Up results

The impact on processes and people is one of the key lenses of use cases deep-dive, with focus on how the ways of working change (e.g. capabilities, activities, …)

Note: PoC is referring to Proof of Concept, PoP referring to Proof of Principle

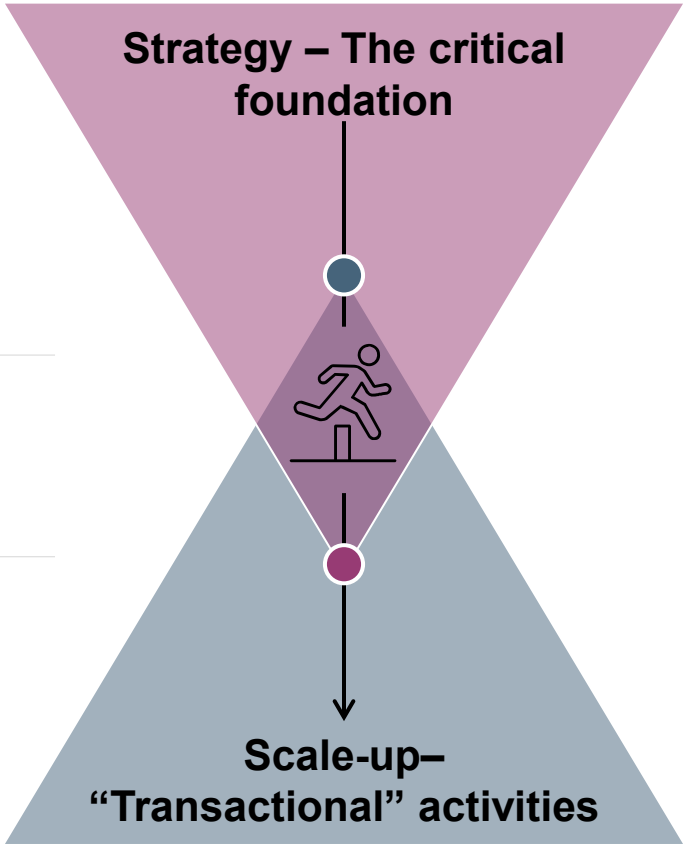
The development of a GenAI Use case consists of **2 key phases: strategic definition and scale-up**

The strategic phase is where the real value and long-term success of a GenAI use case is determined

Problem Framing & Business Alignment
Define the problem/business need, assess the business case (incl. Make vs. Buy evaluations)

UX UI Design
Map out the ideal user journey, focusing on how GenAI will enhance the experience

Architecture Design & PoC Development
Design a scalable, modular architecture and build/implement a Proof of Concept



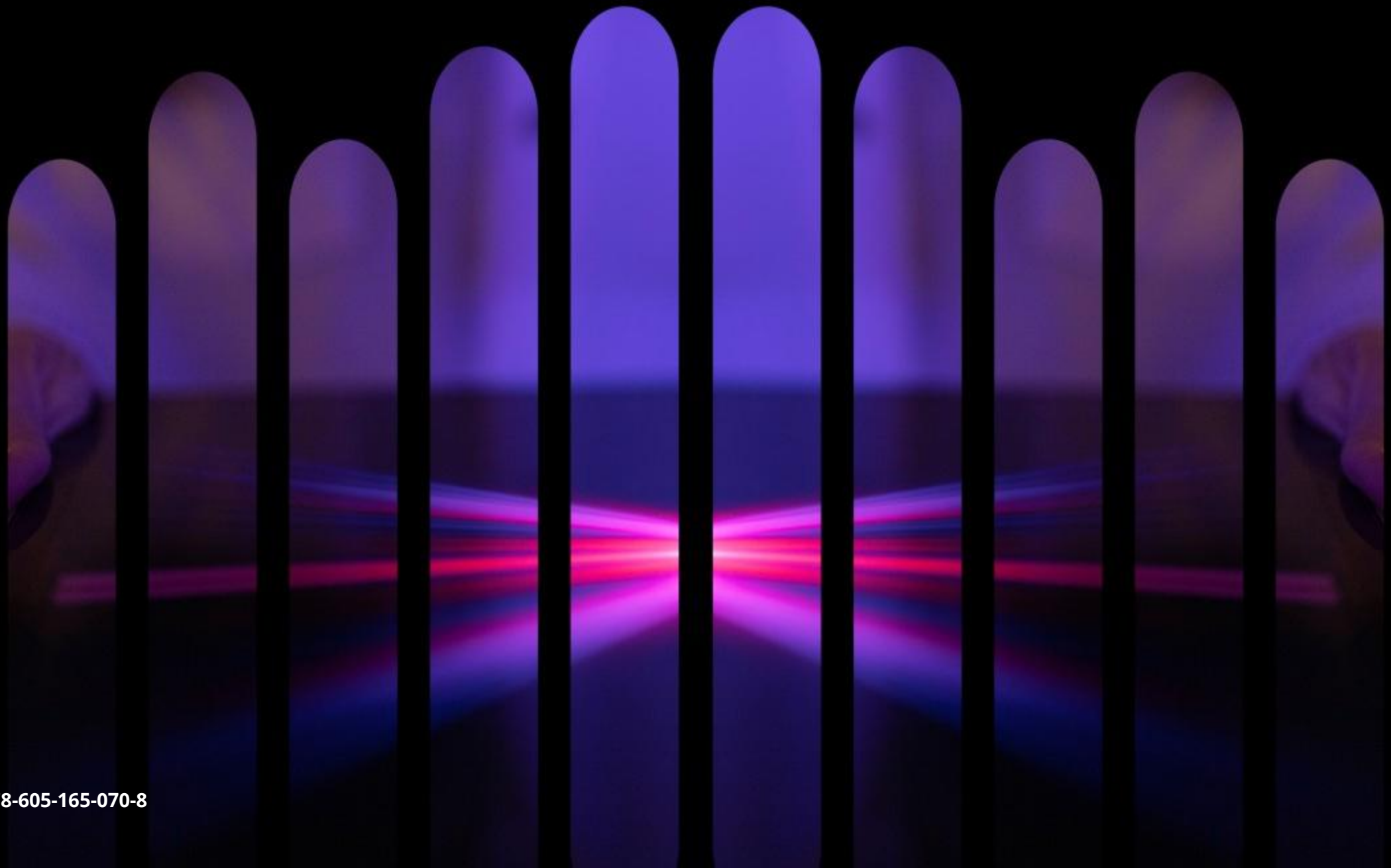
Once the strategic groundwork is in place, scaling becomes more straightforward

Data Ingestion & Integration
Centralizing and structuring all relevant materials to feed into the GenAI pipeline

Model Fine-tuning
Applying fine-tuning where needed, to ensure quality and relevance at scale

Architecture Refinement
Finalizing the infrastructure to support production use, incl. performance and security

A solid strategic foundation is essential to scale effectively: without clear problem framing, experience design, and architecture, scale-up efforts risk inefficiency, delays, and costly rework



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