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Big5 CIO priorities '26

India's Digital Shift Being Tested Inside Enterprise Systems

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5 Themes Shaping India's Digital Shift

Policy context is entering system design early

AI governance, data frameworks & DPI are part of architecture decisions, not post-build constraints. Organisations engaging early with regulators are influencing direction.

AI is being absorbed into accountability structures

The focus is shifting from capability to control: how AI decisions are made, explained & measured within business processes, risk frameworks & performance systems.

Infrastructure limits are starting to define business outcomes

Latency, cost & distributed complexity are affecting customer experience & execution speed. Infrastructure choices are setting boundaries of what can scale.

GCCs are moving into ownership of products & platforms

GCCs are taking on end-to-end responsibility across AI, engineering & cybersecurity. This shifts decision-making closer to where systems are built & run.

Work is being reorganised around human-AI interaction

AI is entering workflows, changing how decisions are made & tasks are structured. Roles, accountability & skill models are being redefined as part of this shift.

India’s digital shift is translating directly into architecture, investment, and operating decisions, placing technology leaders at the centre of business outcomes across risk, cost, performance, and growth.

1. AI system design anchored in governance, policy alignment & sovereignty

AI systems are being shaped by governance requirements at the point of design.

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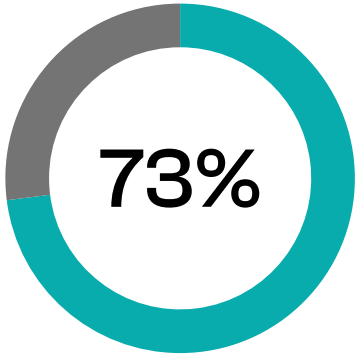
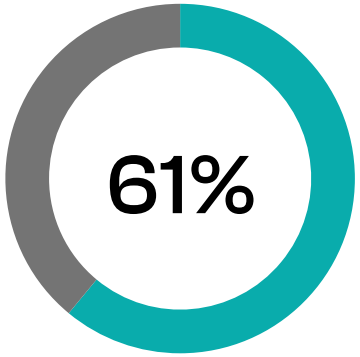
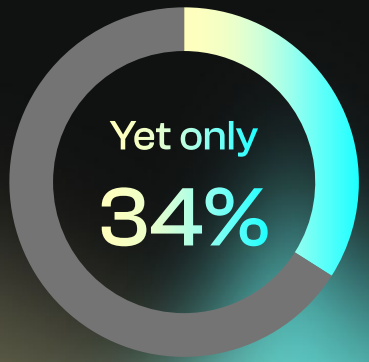
AI architectures that exclude sovereignty will need redesign under regulatory pressure. Design decisions now determine control, not just compliance.



of organisations prioritise governance & auditability



focus on explainable & traceable AI decisions



are explicitly factoring data sovereignty into AI design

Source: Ecosystm Pulse of India's CIO Study, 2026

2. Unmanaged AI adoption as a growing source of enterprise risk

AI adoption is expanding beyond what organisations can fully see or control.

61%

point to shadow IT/AI as a top challenge

46%

struggle with aligning business & technology needs

42%

find maintaining full visibility across their tech environment their biggest challenge

Source: Ecosystm Pulse of India's CIO Study, 2026

IMPACT ON TECH LEADERS

Risk sits outside controlled environments. Without visibility, AI use cannot be governed, traced, or contained.

3. Data and platform design converging into a single systems problem

Data and platforms are being developed separately but are expected to function as a single system.

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Misaligned data and platforms lead to inconsistent outputs and rising integration overhead. Scale becomes difficult to sustain.

Only 31% have contextualised or highly reliable data

55% expect platforms to improve data consistency & visibility

Yet 64% cite integration complexity as the biggest challenge of a platform approach

Source: Ecosystm Pulse of India's CIO Study, 2026

4. Observability evolving into a layer for enterprise decision-making

Observability is generating system-level visibility, but its use remains limited to monitoring.

76%
are focused on automation and visibility across tools and systems

But only

25%
connect observability to cost & resource usage

17%
align observability data with compliance requirements

Source: Ecosystm Pulse of India's CIO Study, 2026

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Visibility without linkage limits action. System signals exist, but do not consistently influence cost, risk, or performance decisions.

5. Standardising how AI is used in decisions, not just where it is deployed

AI is present across the organisation, but its role in decision-making is inconsistent.

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Inconsistent AI use leads to inconsistent decisions. Outcomes vary across similar processes, with unclear accountability.

64%

report only basic or uneven AI adoption & skills

Just 8%

have AI shaping behaviours & incentives across teams

57%

continue to cite talent & skills as a key constraint

Source: Ecosystm Pulse of India's CIO Study, 2026

India's digital shift is creating capability faster than coherence, placing the onus on technology leaders to make systems work consistently across data, AI, and workflows so outcomes are predictable, not dependent on local variation.

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