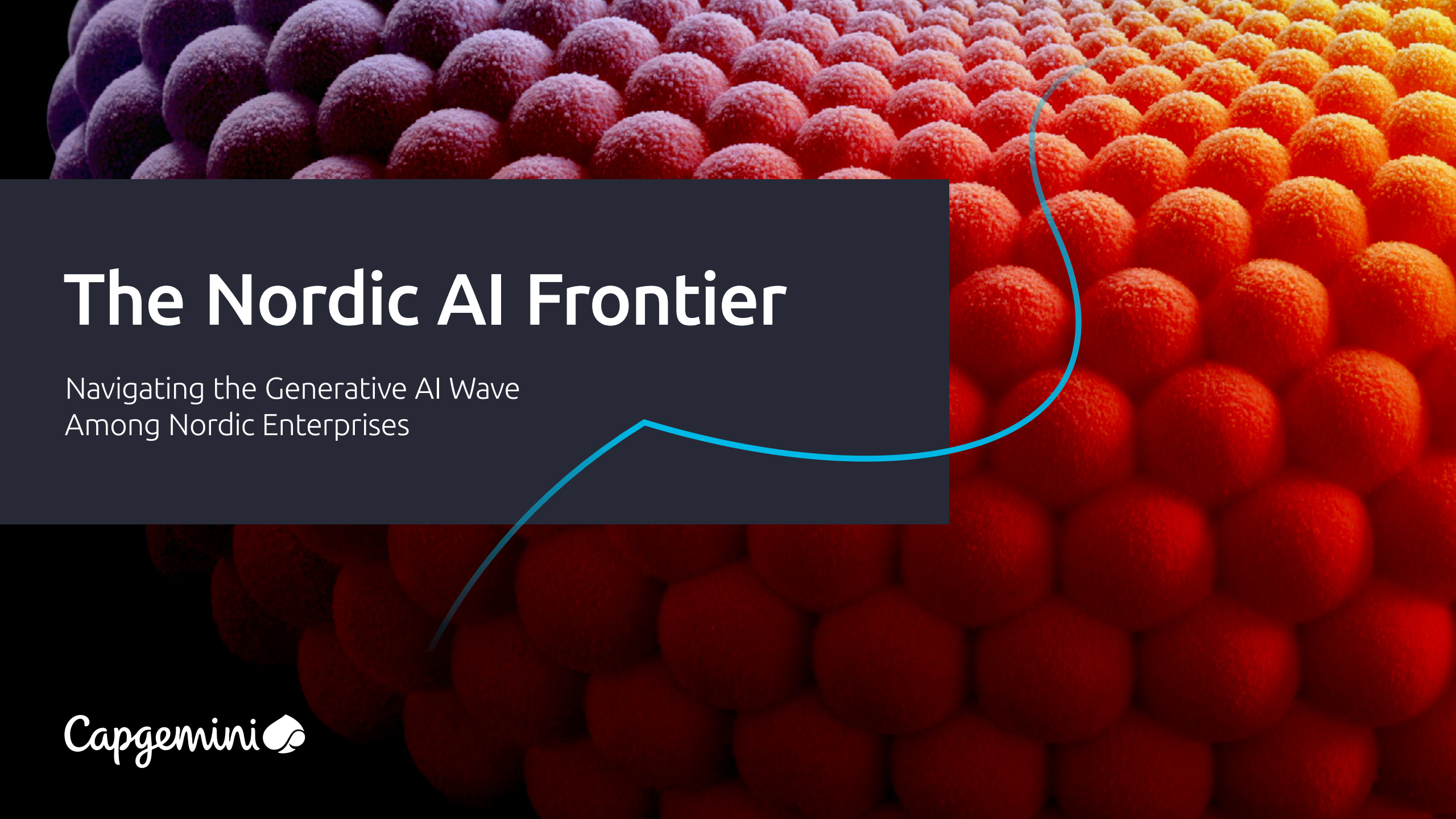


The Nordic AI Frontier

Navigating the Generative AI Wave
Among Nordic Enterprises

Capgemini

Introduction

Generative artificial intelligence (generative AI) has emerged as a forefront technology, capturing widespread attention. Unlike traditional AI systems that are designed to perform specific tasks within predefined parameters, generative AI possesses the remarkable ability to autonomously create new content, such as images, texts and videos. This capability has sparked immense interest across various sectors. As organizations seek innovative solutions to complex problems and aim to enhance their competitive edge, the potential of generative AI to revolutionize workflows, streamline processes, and drive creativity is increasingly recognized.

Generative AI is now moving into core business processes. The strong focus on the modernization of the IT function which we see in the Nordics means that many businesses will have productivity gains from automated software development, AIOps and various copilots. However, it is key to not only focus on tooling, but to put just as much focus on the corresponding change management and benefit tracking.

In 2023, we published *Harnessing the Value of Generative AI: Top use cases across industries*, a report based on a global survey across 1,000 organizations. This year, as a follow up on the Global report, we conducted a Nordic Survey to highlight organizations in the Nordic countries in a similar manner. We conducted a number of interviews in Denmark, Finland, Norway and Sweden to evaluate Nordic decision-makers' views on and perceptions of generative AI, as well as implementation of the technology in their organizations. We delve into the transformative potential of generative AI for organizations across industries, asking how the technology could help productivity and innovation in organizations; gauging adoption rates and assessing challenges.

The survey covers multiple industries, including automotive, consumer products, retail, financial services, telecom, energy and utilities, high tech, industrial manufacturing, and life science. For more details on the survey sample, please refer to the research methodology.

Note: Results are color-coded. Blue in diagrams highlights insights, while table numbers marked in purple or orange indicate significantly higher or lower values than the Nordic average.

Ivar Aune
Vice President, Head of Nordic Generative AI Center of Excellence

Defining generative AI

Generative AI has the capability to learn and reapply the properties and patterns of data for a wide range of applications, from creating text, images, and videos in different styles to generating tailored content. It enables machines to perform creative tasks previously thought to be exclusive to humans. The following table summarizes some of the top generative AI applications at this point in time.

Formats	Selected generative AI applications	Indicative examples
Text	Summarizing and translating into multiple languages	OpenAI's GPT-4, Jasper[1], Microsoft Copilot
Images and video generation	Analyzing existing images/video to generate new content (e.g., video games, VR, animation)	Adobe Firefly[2], Stable Diffusion, Midjourney, krea.ai
Audio	Music generation and remixing, speech synthesis, sound effects, voice conversion, audio enhancement	Sonix.ai (a cloud-based audio and video-transcription solution)[3], Udio
Chatbots	Chatbots to provide automated customer service and advice	Google Bard[4], OpenAI's ChatGPT
Search	Enhanced search functions using natural language processing and machine learning	Perplexity AI[5]

1 SpringerLink, "Generative AI", September 12, 2023 (Edited 2024).
2 Adobe, "Adobe unveils Firefly, a family of new creative generative AI," March 21, 2023.
3 Sonix.ai, "Sonix releases the world's first automated transcription and generative AI summarization tool," December 14, 2022.
4 Google, "An important next step on our AI journey", February 6, 2023.
5 Kevin-Indig, "Early attempts at integrating AI in Search," January 10, 2023.

Summary

Nordic enterprises are adapting to generative AI, navigating challenges while championing a future that blends innovation, ethical governance, and corporate sustainability at the heart of their strategic agendas.

The possibilities arising from generative AI are developing quickly and will most likely disrupt many industries and have a huge impact on many organizations and professions. Understanding the pace of implementation and development would benefit from being measured on a regular basis.

At this point in time, we can draw the following conclusions:

- Nordic enterprises are strategically embracing generative AI, recognizing its transformative potential across key business domains such as sales, marketing, and IT. Their dedication to ethical AI implementation underscores a commitment to responsible corporate citizenship.
- Challenges pertaining to data management complexities, such as multi-source data aggregation, compliance with stringent data privacy laws, and the imperative of maintaining impeccable data quality, form pivotal considerations in their strategic deliberations.
- Looking ahead, the enterprises are proactively shaping a future of work that is augmented by generative AI, envisioning the emergence of innovative job roles and enhanced operational efficiencies.
- This strategic vision is accompanied by a discernible emphasis on talent development and substantial investments earmarked for the seamless integration of generative AI within their corporate fabric.
- Discussions also extend to sustainability imperatives, with a sharp focus on understanding and mitigating the potential environmental footprint of generative AI deployments.
- The readiness to streamline workforce structures upon full-scale generative AI adoption signifies a forward-thinking approach to organizational optimization.

Contents

Results

01 Capabilities and awareness

AI capabilities

Generative AI adoption in Nordic organizations varies: some explore, pilot, or implement these capabilities, while a minority shows no interest. 30 percent of the respondents have enabled AI capabilities in some or all functions.

Comparison with the global survey, made during Q1 2023, indicate that organizations have started to implement solutions to a high degree within the last 12 months.

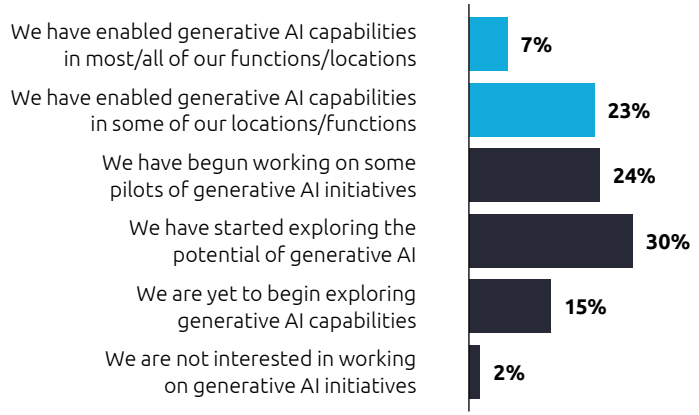
In a Global Perspective

Worldwide, 6 percent of organizations had enabled some generative AI capabilities a year ago.

Source: Capgemini Generative AI Global Survey, April 2023

How would you rate the generative AI capabilities in your organization?

Results are color-coded. Blue (●) in diagrams highlights insights, while table numbers marked in purple (●) or orange (●) indicate significantly higher or lower values than the Nordic average.

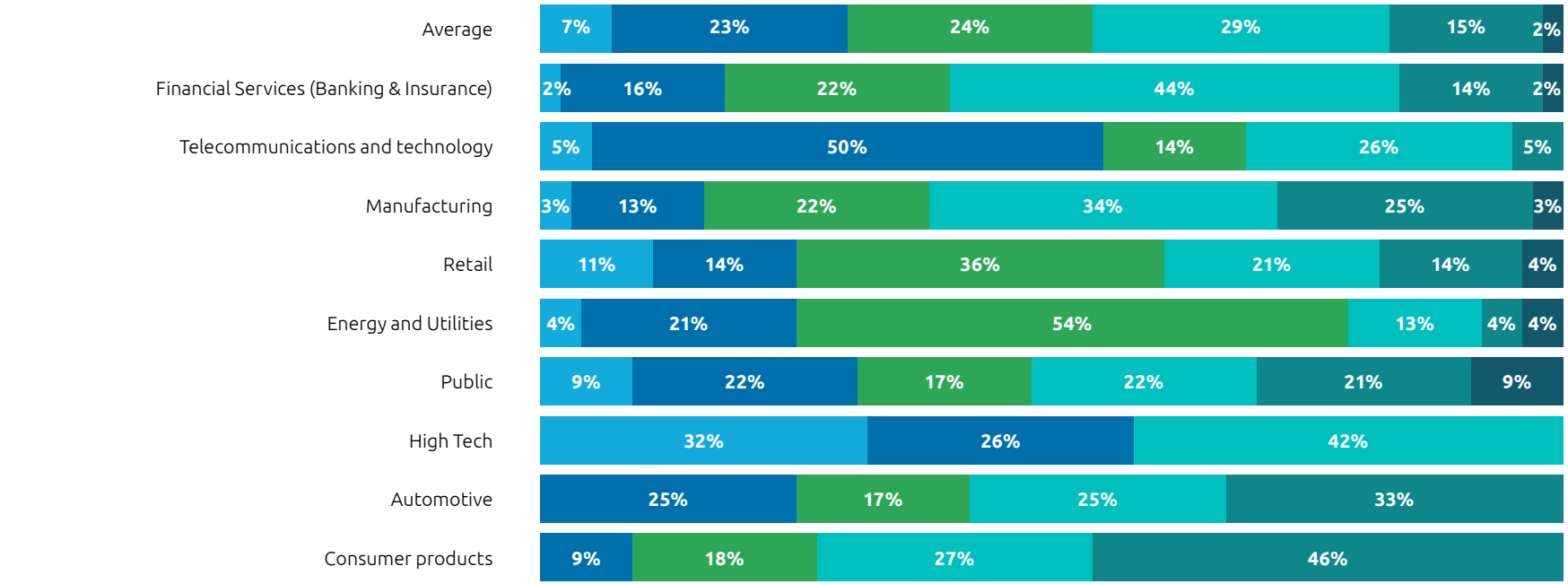


	Global	Finland	Sweden	Norway	Denmark
We have enabled generative AI capabilities in most/all of our functions/locations		7%	6%	6%	8%
We have enabled generative AI capabilities in some of our locations/functions	6%	31%	18%	22%	19%
We have begun working on some pilots of generative AI initiatives	40%	30%	21%	24%	19%
We have started exploring the potential of generative AI	51%	25%	40%	32%	19%
We are yet to begin exploring generative AI capabilities		7%	11%	15%	30%
We are not interested in working on generative AI initiatives		0%	3%	1%	6%

AI capabilities – per sector

Generative AI adoption varies widely when comparing sectors. Not surprisingly, the high tech and telecom sectors are early adopters, while, for example, the public and consumer sectors are slower to implement solutions.

How would you rate the generative AI capabilities in your organization?

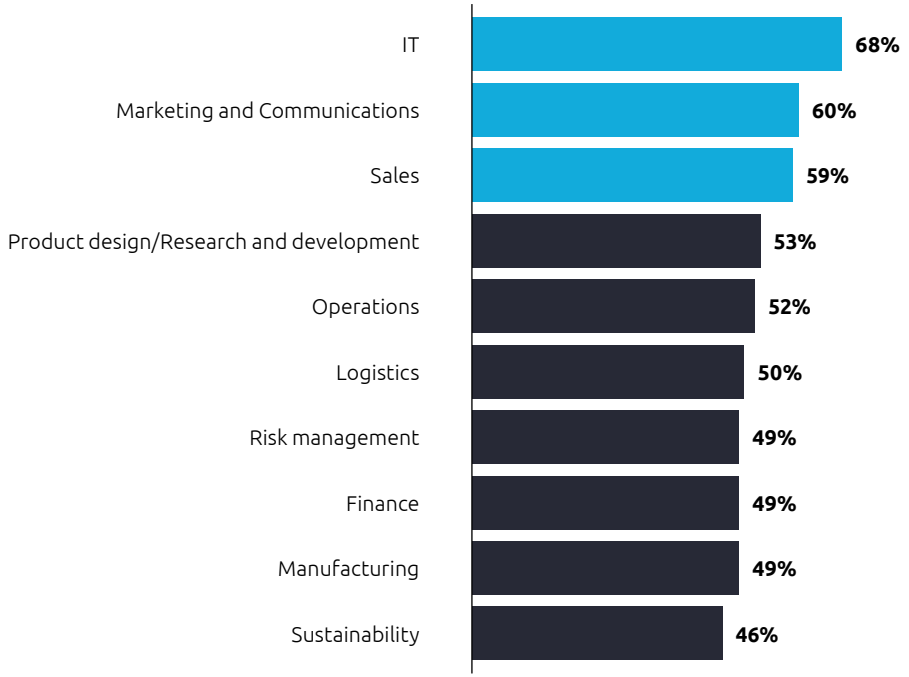


Awareness of generative AI potential, per function

There is a clear recognition of the expansive potential for generative AI across diverse functions; particularly within the domains of IT, marketing, communications and sales.

There are significant variations in the underlying data based on the respondents' respective industries.

Please rate the extent to which your organization is aware of the potential of generative AI in the following functions.
(Scale of 1–7; percentage of respondents that picked 5, 6 or 7)



	Finland	Sweden	Norway	Denmark
IT	72%	65%	74%	55%
Marketing and Communications	63%	51%	67%	57%
Sales	54%	63%	63%	55%
Product design/Research and development	37%	61%	64%	49%
Operations	35%	54%	65%	47%
Logistics	24%	58%	60%	53%
Risk management	26%	49%	59%	62%
Finance	28%	57%	54%	58%
Manufacturing	26%	55%	59%	49%
Sustainability	22%	57%	59%	45%

Results

02 Leadership and implementation

Summary of implementation

In essence, the Nordic region is embracing generative AI with a sense of curiosity and action, recognizing its potential to redefine business strategies, enhance customer experiences, and drive innovation in the digital era. As organizations navigate this transformative terrain, strategic planning, ethical considerations, and external partnerships emerge as critical factors for success in the generative AI landscape.

The Nordic region is witnessing a surge of interest and active exploration into the potential of generative AI. Stakeholders are increasingly recognizing its capacity to revolutionize customer service, elevate interactivity, and stimulate creativity. Opportunities for product differentiation, enhanced accessibility, and substantial productivity and profitability gains are also being acknowledged.

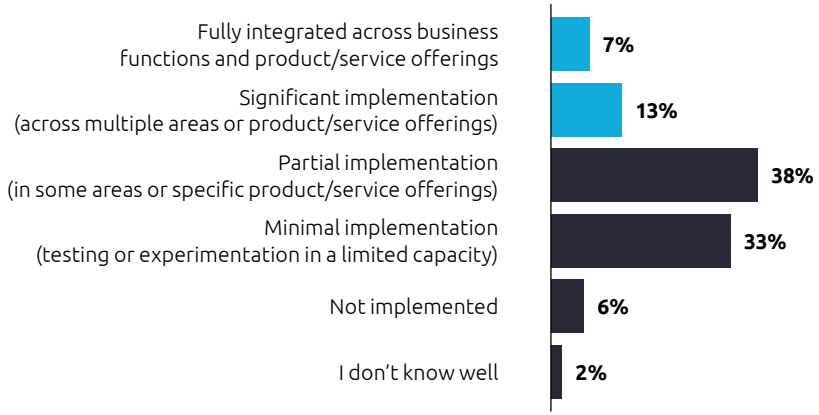
Moreover, there is a palpable call for external support to navigate the ethical dimensions and seamlessly integrate generative AI into the digital fabric of organizations.

The evolving landscape of generative AI adoption in Nordic organizations is marked by a spectrum of activity. Some entities are at the forefront, actively piloting initiatives and embedding generative AI capabilities across various functions and locations. Others are in the process of exploration, testing pilot projects or selectively enabling generative AI in targeted areas. Nonetheless, it is notable that a segment of organizations remains disinterested in pursuing generative AI initiatives.

Organization implementation of generative AI

Enterprises have initiated generative AI adoption; however, no more than 20 percent have achieved comprehensive or near-complete implementation.

To what extent has your organization implemented generative AI to enhance your products/ services, streamline its operations, and/or improve customer experiences?



	Finland	Sweden	Norway	Denmark
Fully integrated across business functions and product/service offerings	0%	3%	16%	8%
Significant implementation (across multiple areas or product/service offerings)	6%	16%	15%	17%
Partial implementation (in some areas or specific product/service offerings)	42%	52%	28%	32%
Minimal implementation (testing or experimentation in a limited capacity)	42%	23%	33%	32%
Not implemented	10%	5%	4%	8%
I don't know well	0%	2%	4%	4%

Generative AI within leadership and in the boardroom

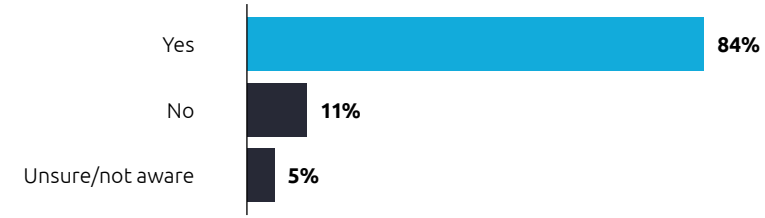
Generative AI has a significant focus within today's management and boardroom discussions.

In a Global Perspective

Worldwide, 96 percent of executives cite generative AI as a hot topic of discussion in boardrooms.

Source: Capgemini Generative AI Global Survey, April 2023

Is generative AI a topic for your leadership/boardroom discussions?

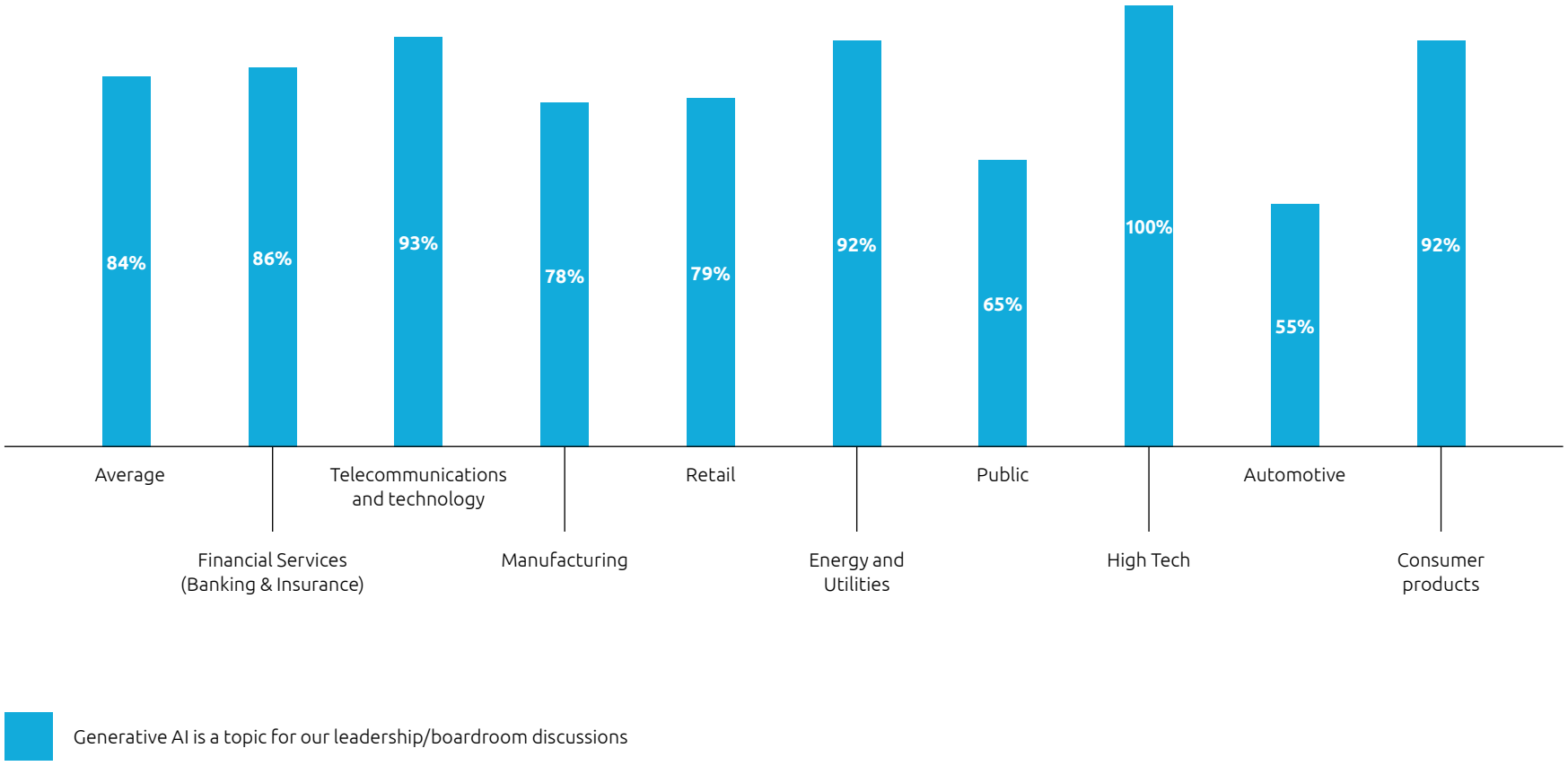


	Finland	Sweden	Norway	Denmark
Yes	92%	79%	87%	75%
No	6%	15%	11%	15%
Unsure/not aware	3%	6%	2%	9%

Generative AI within leadership and in the board-room – per sector

Generative AI is a hot topic in most sectors, with the high tech, telecom and energy and utilities sectors leading the field. The public and automotive sectors put less priority on lifting generative AI discussions to the boardroom level.

Is generative AI a topic for your leadership/boardroom discussions?



Leadership and generative AI

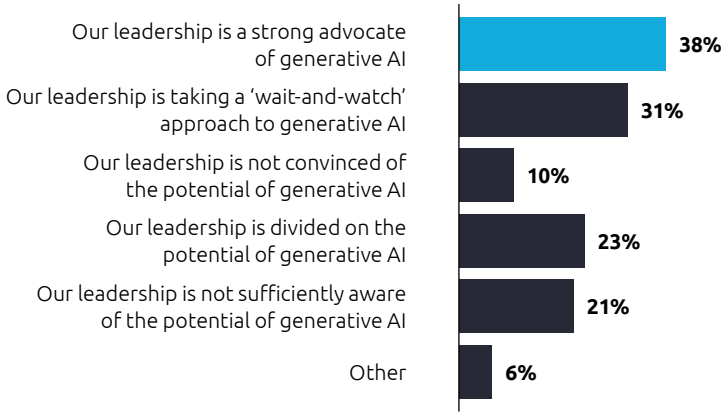
38 percent of all leaderships are strong advocates of generative AI. The advocacy is generally stronger in Finland than in the other Nordic countries.

In a Global Perspective

Worldwide, 59 percent of executives say their leadership are strong advocates.

Source: Capgemini Generative AI Global Survey, April 2023

Please select which of the below statements applies to your organization regarding generative AI.
(Multiple choices possible)

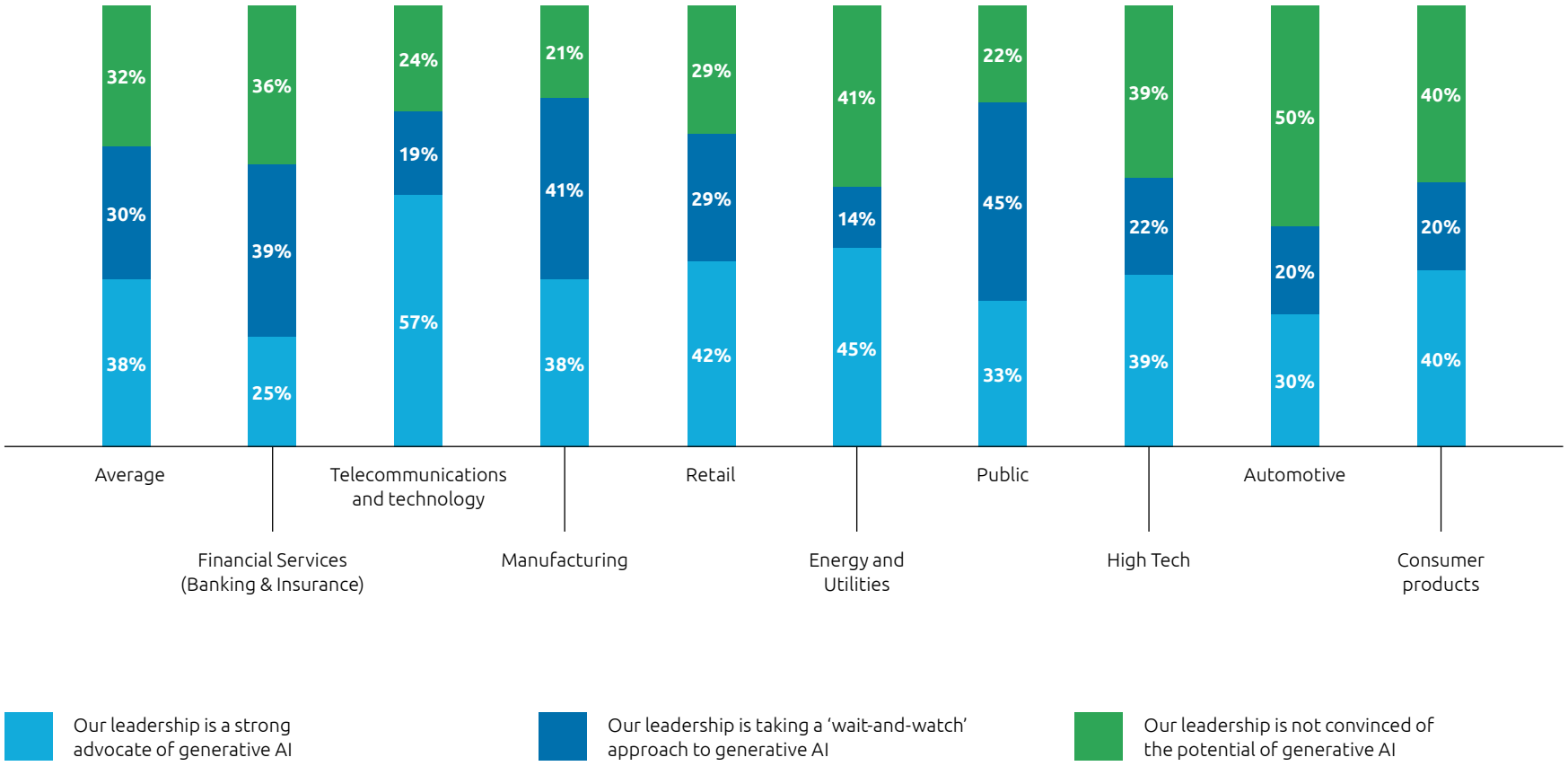


	Finland	Sweden	Norway	Denmark
Our leadership is a strong advocate of generative AI	49%	31%	41%	28%
Our leadership is taking a 'wait-and-watch' approach to generative AI	38%	27%	28%	32%
Our leadership is not convinced of the potential of generative AI	0%	16%	14%	11%
Our leadership is divided on the potential of generative AI	13%	27%	25%	28%
Our leadership is not sufficiently aware of the potential of generative AI	15%	27%	18%	28%
Other	15%	3%	5%	0%

Leadership and generative AI – per sector

The spread in opinions on the potential benefit of generative AI solutions in organizations is wide. The strongest advocacy is shown in the telecom sector, while the financial, manufacturing and public sectors are proponents of following the development of the technology.

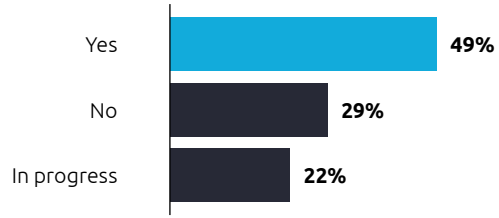
Please select which of the below statements applies to your organization regarding generative AI.
(Multiple choices possible)



Measuring benefits of generative AI

Nearly half of all companies measure the benefits of generative AI. Finland assesses the effects of generative AI to a comparatively lesser degree than Denmark and Norway.

Do you measure the benefits of generative AI?



	Finland	Sweden	Norway	Denmark
Yes	20%	48%	64%	68%
No	45%	26%	19%	26%
In progress	35%	26%	18%	6%

Generative AI potential to support innovation

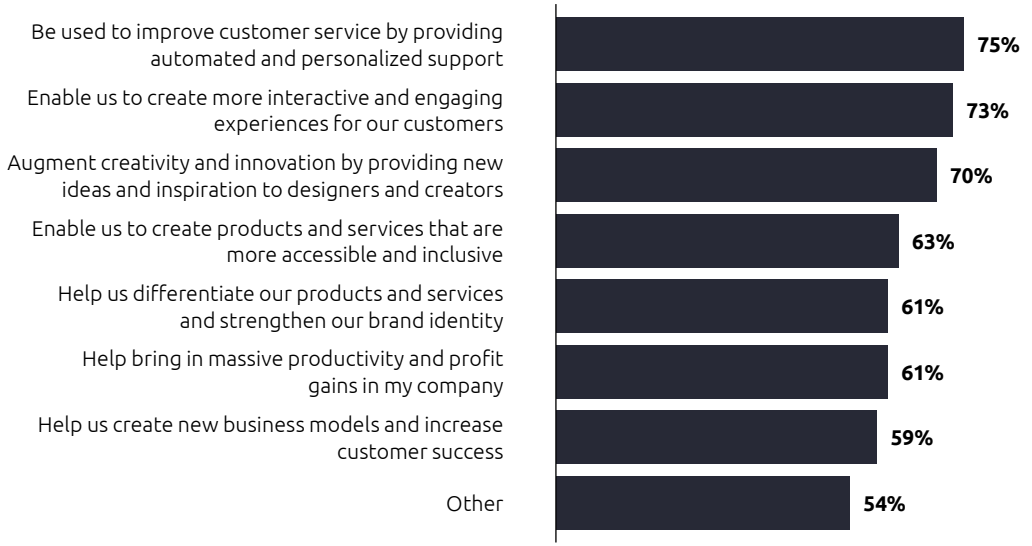
Generative AI is viewed as a promising tool for enhancing customer service, innovation, and business growth. Finland tends to see more potential in customer focused solutions than the other Nordic countries.

In a Global Perspective

Worldwide, 78 percent of executives believe the design process will become smoother.

Source: Capgemini Generative AI Global Survey, April 2023

Please indicate the extent to which you agree with the following statements regarding the potential use of generative AI for creating new products, services, and experiences for consumers in your organization. (Multiple choices possible)



	Finland	Sweden	Norway	Denmark
Be used to improve customer service by providing automated and personalized support	91%	65%	75%	66%
Enable us to create more interactive and engaging experiences for our customers	90%	63%	80%	55%
Augment creativity and innovation by providing new ideas and inspiration to designers and creators	81%	63%	76%	53%
Enable us to create products and services that are more accessible and inclusive	68%	56%	68%	58%
Help us differentiate our products and services and strengthen our brand identity	65%	58%	66%	53%
Help bring in massive productivity and profit gains in my company	67%	60%	67%	47%
Help us create new business models and increase customer success	52%	65%	65%	55%
Other	53%	45%	67%	54%

RESPONDENT, FINANCIAL SERVICES, FINLAND

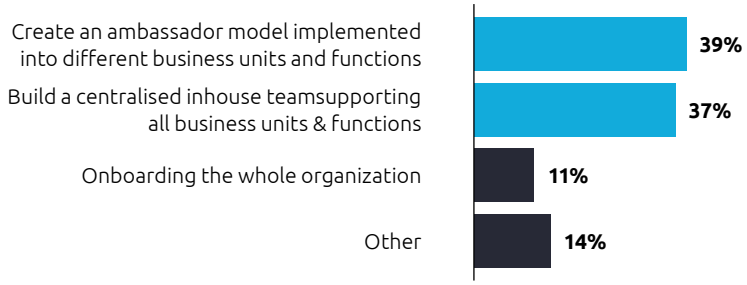
“Generative AI has brought efficiency to sales, so that representatives can use more time on value-adding activities”

How to operate in the age of generative AI

A majority intends to establish an ambassador model or a centralized in-house team, rather than implement a companywide onboarding.

In Finland, many respondents in the ‘Other’ category clarified that they for example would build an inhouse team first, then expand to the ambassador model and train the whole organization.

How are you aiming to operate in the age of generative AI?



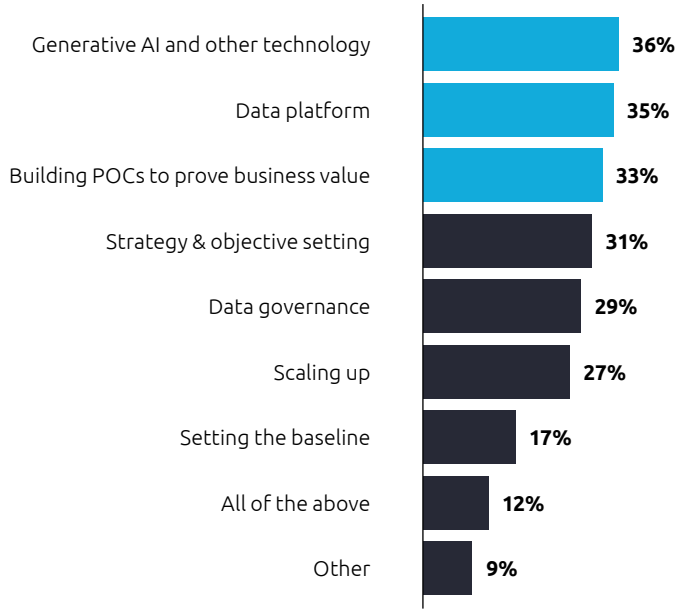
	Finland	Sweden	Norway	Denmark
Create an ambassador model implemented into different business units and functions	38%	45%	34%	40%
Build a centralised inhouse teamsupporting all business units & functions	20%	42%	40%	47%
Onboarding the whole organization	11%	10%	11%	11%
Other	31%	3%	15%	2%

Need for external support

There is a notable demand for external support across various areas; in particular generative AI and other technologies, data platforms, and building proofs of concept (POCs).

Organizations in Sweden to a large extent want help on the strategy, while organizations in Finland have focused on early-stage execution (proofs-of-concept) with plans to scale across the organization.

In which of the following areas do you see a need for external support?
(Multiple choices possible)



	Finland	Sweden	Norway	Denmark
Generative AI and other technology	35%	42%	40%	25%
Data platform	18%	47%	39%	40%
Building POCs to prove business value	42%	32%	32%	25%
Strategy & objective setting	18%	42%	40%	21%
Data governance	23%	32%	38%	21%
Scaling up	31%	18%	35%	21%
Setting the baseline	10%	31%	16%	13%
All of the above	17%	8%	12%	11%
Other	23%	5%	6%	2%

Strategic views on generative AI adoption

Nordic firms are keenly aware of the strategic importance of generative AI, with a strong focus on its ethical implications, role in digital strategy, and the necessity to rethink business models to remain competitive.

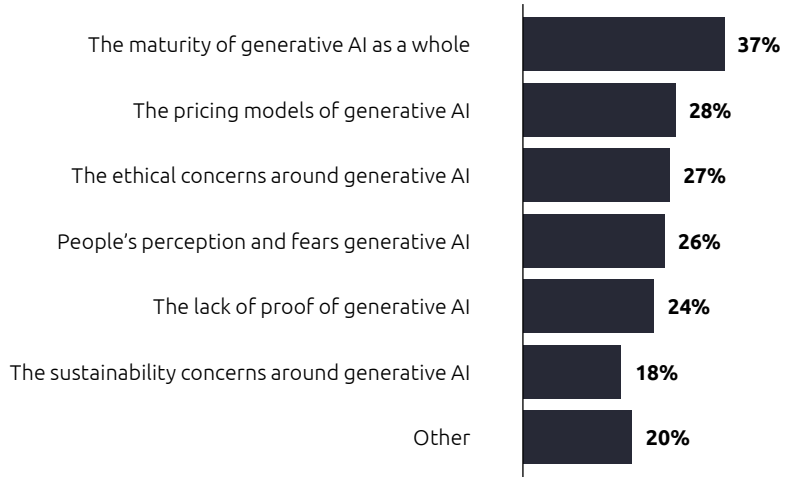
Please indicate the extent to which you agree with the below statements regarding the potential impact of widespread adoption of generative AI on your firm's strategic evolution. (Multiple choices possible)

	Finland	Sweden	Norway	Denmark
Our organization is carefully considering the ethical implications of generative AI before its widespread adoption.	83%	58%	75%	49%
Generative AI will play a key role in our organization's digital strategy and transformation efforts.	86%	48%	72%	55%
We will be at a significant disadvantage compared to our competitors if we do not adopt generative AI.	68%	58%	80%	47%
Generative AI will require us to rethink our business models in order to remain competitive.	58%	62%	68%	51%
Generative AI will facilitate collaboration across the entire ecosystem	53%	62%	56%	57%
Generative AI has the potential to fundamentally shift our business strategy	39%	56%	68%	53%
Large scale adoption of generative AI will be confined to Big tech companies	21%	60%	54%	47%

Barriers to start with generative AI

Key obstacles in the generative AI journey include concerns on maturity, pricing models, ethics, perception, proof, sustainability and miscellaneous factors. Sweden is more concerned with the pricing models than the other Nordic countries, while Finland might be concerned with sustainability issues, but it will not prevent organizations from starting the generative AI journey.

What prevents you from starting the generative AI journey?
(Multiple choices possible)



	Finland	Sweden	Norway	Denmark
The maturity of generative AI as a whole	35%	32%	46%	30%
The pricing models of generative AI	17%	42%	27%	28%
The ethical concerns around generative AI	31%	26%	25%	26%
People's perception and fears generative AI	20%	34%	29%	21%
The lack of proof of generative AI	21%	27%	27%	17%
The sustainability concerns around generative AI	4%	18%	26%	23%
Other	49%	8%	16%	0%

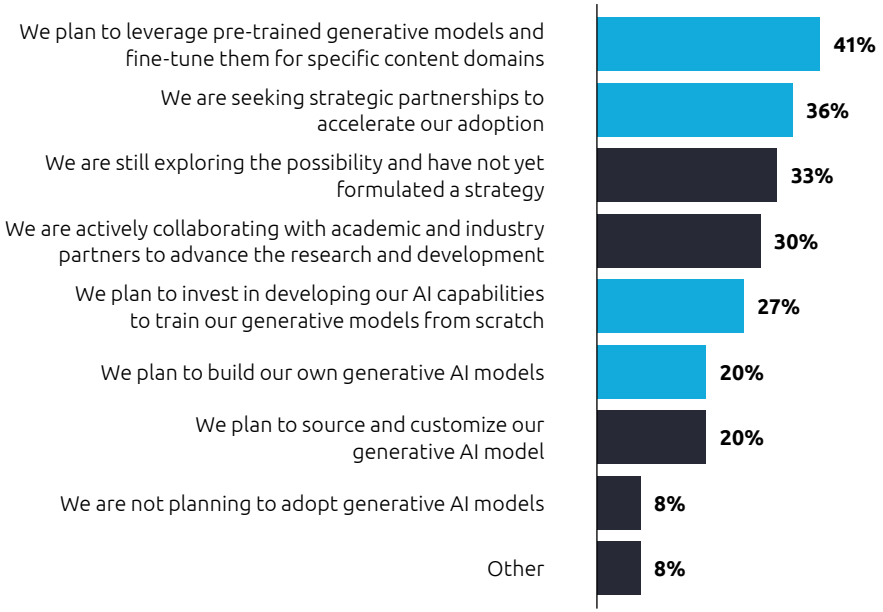
IEVA MARTINKENAITE, SVP,
HEAD OF RESEARCH AND INNOVATION AT TELENOR

"To scale privacy and security sensitive generative AI applications, the Nordic countries will need sovereign cloud capabilities. That is why we teamed up with NVIDIA to truly accelerate the build-up of AI factory in these markets with models fully run and operated from Norway."

Generative AI strategy

A majority will leverage pre-trained models and are seeking strategic partnerships. Less than one in three will train generative models from scratch, while no more than one in five will build their own generative AI models. In Finland the strategy to utilize pre-trained models is even more pronounced than in the other Nordic countries.

What is your organization's strategy for adopting generative AI models?
(Multiple choices possible)



	Finland	Sweden	Norway	Denmark
We plan to leverage pre-trained generative models and fine-tune them for specific content domains	59%	31%	38%	32%
We are seeking strategic partnerships to accelerate our adoption	34%	39%	38%	34%
We are still exploring the possibility and have not yet formulated a strategy	41%	35%	33%	21%
We are actively collaborating with academic and industry partners to advance the research and development	28%	24%	36%	26%
We plan to invest in developing our AI capabilities to train our generative models from scratch	28%	31%	24%	25%
We plan to build our own generative AI models	20%	23%	19%	21%
We plan to source and customize our generative AI model	14%	27%	22%	15%
We are not planning to adopt generative AI models	0%	11%	9%	15%
Other	15%	6%	7%	0%

Generative AI level of integration

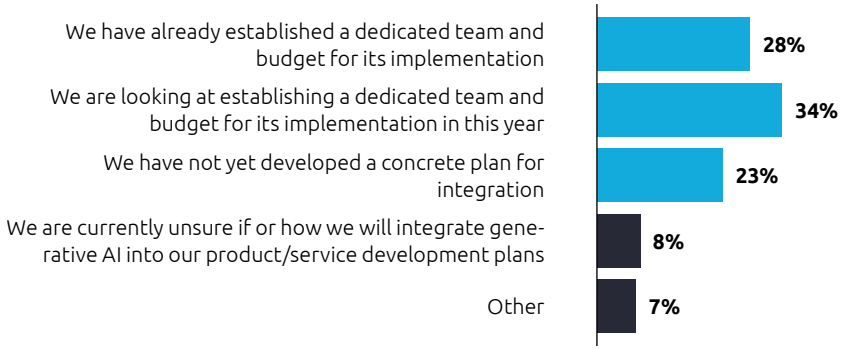
Nordic organizations' readiness to integrate generative AI into future product/service development plans varies: 28 percent have dedicated teams and budgets, 34 percent plan to establish them, while 23 percent lack concrete integration plans.

In a Global Perspective

Worldwide, 40 percent of organizations have established a dedicated team and budget.

Source: Capgemini Generative AI Global Survey, April 2023

What is your current level of integration of generative AI into your organization's future product/service development plans?

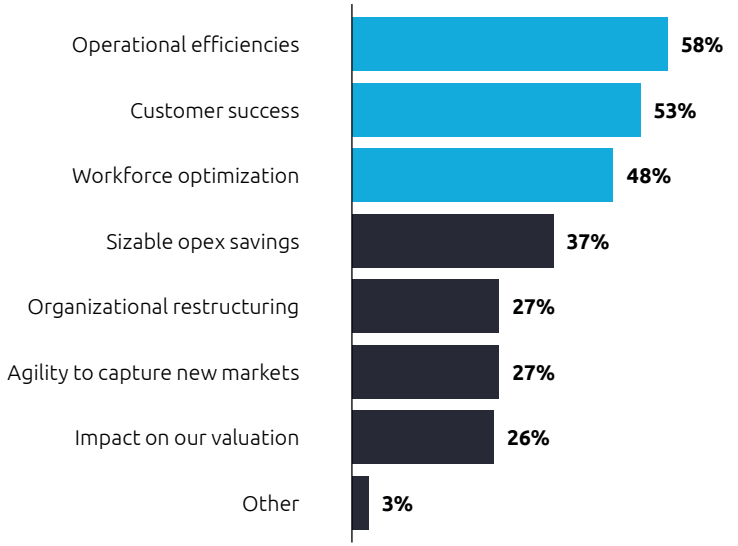


	Finland	Sweden	Norway	Denmark
We have already established a dedicated team and budget for its implementation	25%	21%	39%	23%
We are looking at establishing a dedicated team and budget for its implementation in this year	11%	50%	32%	49%
We have not yet developed a concrete plan for integration	31%	16%	21%	23%
We are currently unsure if or how we will integrate generative AI into our product/service development plans	14%	10%	5%	6%
Other	18%	3%	4%	0%

Expected benefits from generative AI

Nordic organizations foresee significant benefits from generative AI in three years: operational efficiencies, customer success, and workforce optimization are top expectations.

What benefits do you expect to realize at an organizational level from generative AI (3 years from now)?
(Multiple choices possible)



	Finland	Sweden	Norway	Denmark
Operational efficiencies	92%	44%	56%	34%
Customer success	69%	39%	61%	36%
Workforce optimization	63%	40%	49%	36%
Sizable opex savings	48%	26%	47%	17%
Organizational restructuring	20%	34%	26%	30%
Agility to capture new markets	20%	39%	28%	19%
Impact on our valuation	17%	42%	25%	23%
Other	8%	0%	1%	0%

In a Global Perspective

Worldwide, executives expect a 9 percent in both efficiency and satisfaction in three years.

Source: Capgemini Generative AI Global Survey, April 2023

Data management challenges

Nordic organizations face hurdles in leveraging generative AI fully, including challenges with data aggregation, privacy laws, poor data quality, and integration difficulties.

In a Global Perspective

Worldwide, 51 percent of executives cite a lack of clarity of underlying data as a challenge.

Source: Capgemini Generative AI Global Survey, April 2023

Which of the below data management challenges are hindering your organization from realizing the full potential of generative AI?
(Top three choices of respondents)

		Finland	Sweden	Norway	Denmark
Multi-source and multi-format data aggregation	65%	74%	56%	71%	53%
Data privacy laws	61%	61%	66%	66%	45%
Poor data quality in the organization	60%	71%	56%	65%	42%
Lack of unified data platforms	59%	58%	56%	71%	47%
Inability to access or integrate data with suppliers and/or clients	56%	52%	56%	64%	49%
Flexible data modeling and mapping deploy	51%	46%	52%	58%	47%
Deployment of ontology and semantic technologies	48%	36%	60%	51%	47%
Hybrid cloud deployment and API integration services	46%	33%	52%	56%	45%
Right mix of compute capabilities: device, edge, cloud	45%	24%	55%	53%	49%
Other	65%	56%	64%	91%	50%

Results

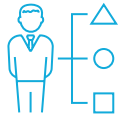
03 Potential company perspective

Summary potential company perspective

In summary, the results show that Nordic companies are facing an exciting future with generative AI, strategically positioning themselves to maximize the benefits and navigate challenges in a responsible and innovative manner.

Strategic use of generative AI

Companies recognize the potential of strategically integrating generative AI within business areas such as sales, marketing, and IT, aiming for differentiation and competitive advantages.



Emergence of new job roles

Embracing generative AI, companies look forward to creating new, innovative job roles and enhancing operational efficiencies.

Ethical AI implementation

A clear focus on the ethical implementation of AI demonstrates the companies' commitment to responsible corporate citizenship and good business ethics.

Data management as a key factor

The challenging and complex nature of data management, including multi-source data aggregation and ensuring data quality, is at the forefront of their strategic discussions.

Talent development & skill transfer

Companies plan to invest in developing and appreciating their existing workforce, aiming to smoothly integrate generative AI through talent development.

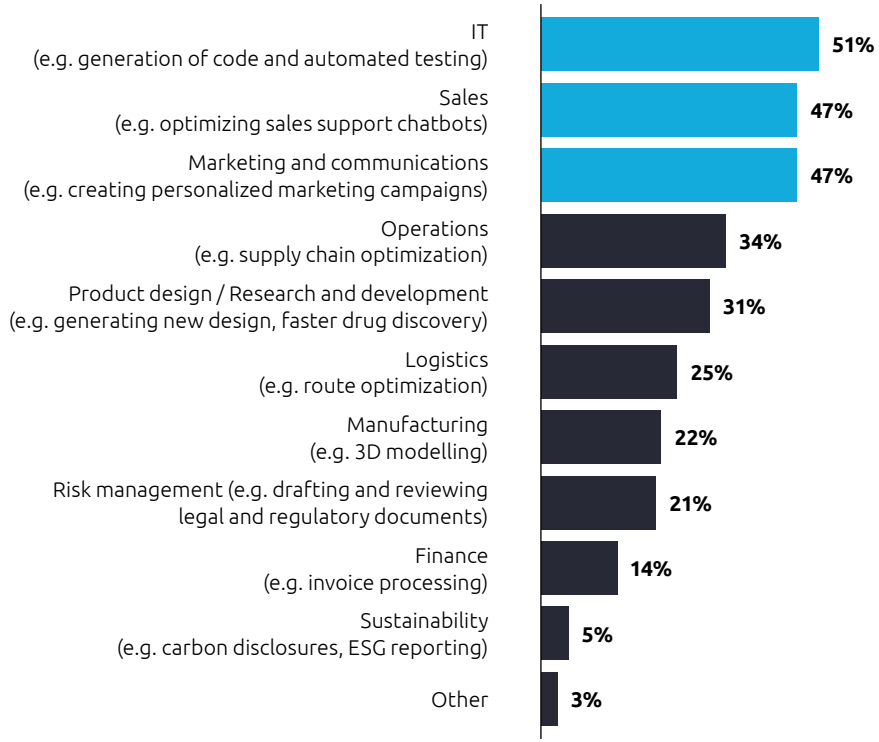
Focus on sustainability

Awareness of the potential environmental impact of generative AI has led to discussions on integrating sustainability aspects into implementation strategies.

Generative AI potential

IT, sales, and marketing and communications show the most promise for generative AI innovation. Solutions include automated code generation, chatbot optimization, and personalized campaigns.

In which business functions do you see the most potential for generative AI models to drive innovation and create value for your organization?
(Top three choices of respondents)



	Finland	Sweden	Norway	Denmark
IT (e.g. generation of code and automated testing)	58%	48%	51%	43%
Sales (e.g. optimizing sales support chatbots)	55%	42%	46%	43%
Marketing and communications (e.g. creating personalized marketing campaigns)	55%	35%	56%	34%
Operations (e.g. supply chain optimization)	34%	32%	36%	30%
Product design / Research and development (e.g. generating new design, faster drug discovery)	27%	37%	28%	36%
Logistics (e.g. route optimization)	14%	32%	25%	34%
Manufacturing (e.g. 3D modelling)	14%	32%	16%	28%
Risk management (e.g. drafting and reviewing legal and regulatory documents)	23%	23%	14%	28%
Finance (e.g. invoice processing)	10%	11%	20%	15%
Sustainability (e.g. carbon disclosures, ESG reporting)	6%	6%	1%	8%
Other	6%	0%	6%	0%

In a Global Perspective

Worldwide, 67 percent of organizations see potential in IT, 54 in Sales and 48 in Marketing.

Source: Capgemini Generative AI Global Survey, April 2023

Generative AI usage

Marketing and communications, IT, and sales are the primary areas for current and planned generative AI use, emphasizing personalized campaigns, automated code generation, and chatbot optimization.

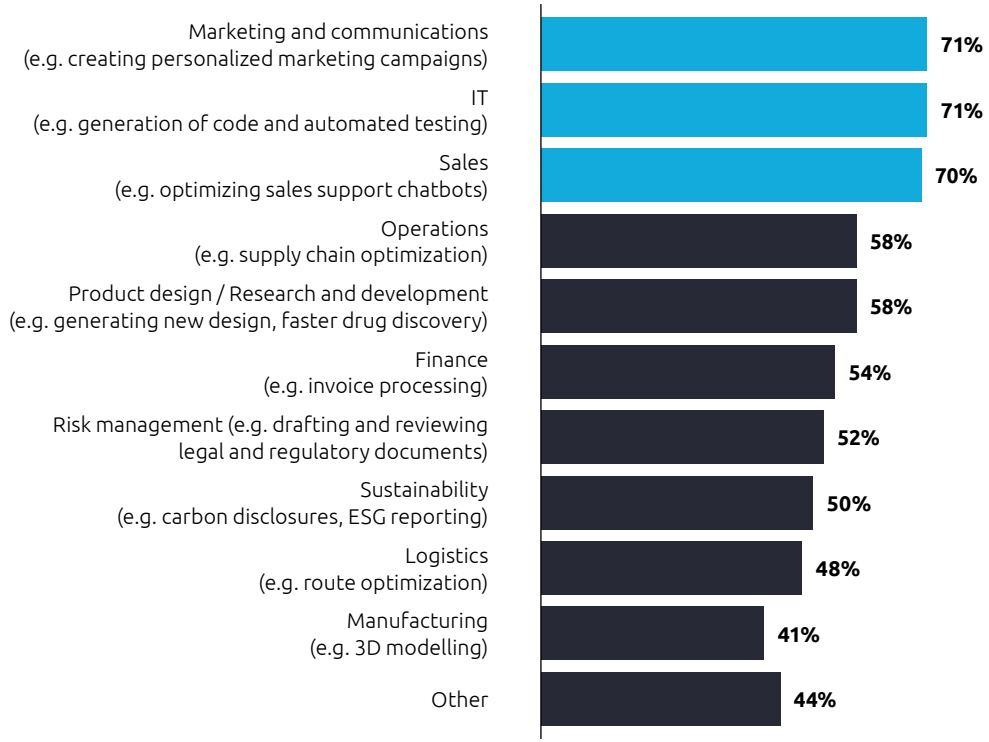
In a Global Perspective

Worldwide, 54 percent of organizations plan to use AI in IT, 47 in Sales and 46 in Marketing.

Source: Capgemini Generative AI Global Survey, April 2023

In which business function(s) does your organization use or plan to use generative AI the most? (Now or Near)

(Top three choices of respondents)



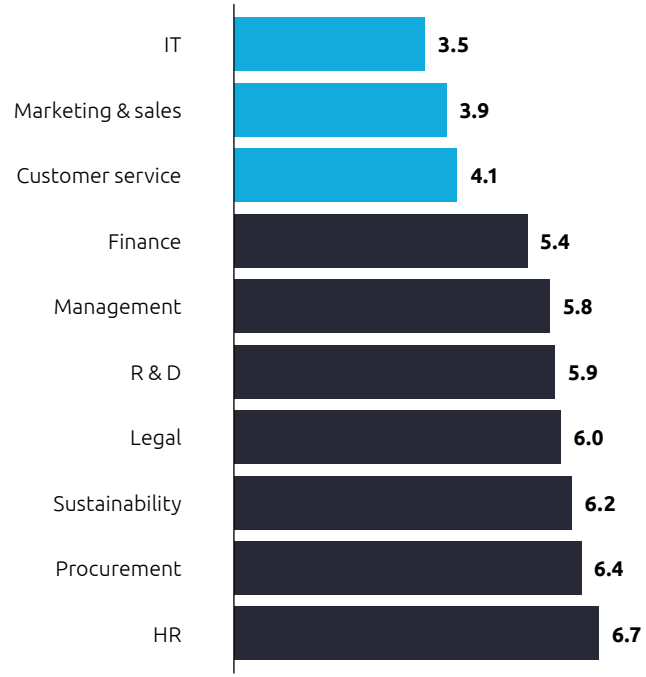
	Finland	Sweden	Norway	Denmark
Marketing and communications (e.g. creating personalized marketing campaigns)	87%	53%	77%	60%
IT (e.g. generation of code and automated testing)	87%	53%	78%	58%
Sales (e.g. optimizing sales support chatbots)	76%	63%	72%	68%
Operations (e.g. supply chain optimization)	42%	52%	76%	58%
Product design / Research and development (e.g. generating new design, faster drug discovery)	53%	50%	65%	64%
Finance (e.g. invoice processing)	54%	48%	56%	55%
Risk management (e.g. drafting and reviewing legal and regulatory documents)	40%	55%	60%	55%
Sustainability (e.g. carbon disclosures, ESG reporting)	41%	44%	59%	55%
Logistics (e.g. route optimization)	30%	57%	55%	49%
Manufacturing (e.g. 3D modelling)	19%	51%	51%	45%
Other	35%	38%	68%	39%

Generative AI functions

Over the next three years IT, marketing & sales, and customer service will be most impacted by generative AI, followed by finance, management and R&D. Finland has greater focus on marketing & sales and customer service than the other Nordic countries.

Which functions will be impacted with generative AI in your organization (within the next 3 years)?

A lower score is a higher ranking (ranking 1 = first priority, 10 = lowest priority)



	Finland	Sweden	Norway	Denmark
IT	3.2	3.8	3.6	3.4
Marketing & sales	2.5	5.0	4.2	4.1
Customer service	3.1	4.2	4.1	5.2
Finance	5.8	5.4	5.0	5.5
Management	6.1	5.5	6.1	5.5
R & D	5.4	5.7	6.3	6.1
Legal	6.3	5.6	6.2	5.8
Sustainability	7.4	5.7	6.2	5.0
Procurement	6.8	6.4	6.5	5.8
HR	8.4	5.8	6.1	6.2

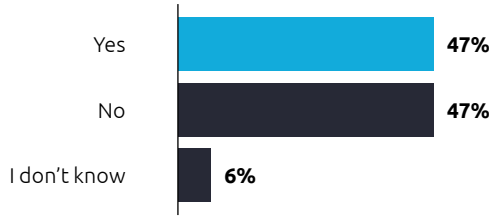
LINDA ÖRTLUND, HEAD OF AI COE, SKF

"As a manufacturing company we have been working with LEAN principles in our factories for a long time. With the new capabilities of generative AI we can truly target LEAN also for our white-collar workers."

Generative AI effect on roles

About as many companies have seen roles affected by AI as have not.
The impact has been greater in Norway, lesser in Finland.

Has generative AI impacted existing roles within your organization?

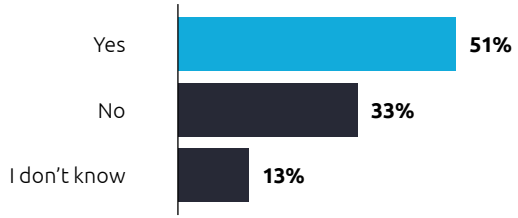


	Finland	Sweden	Norway	Denmark
Yes	26%	45%	65%	53%
No	70%	45%	30%	42%
I don't know	4%	10%	5%	6%

Generative AI demand for new roles

Generative AI has created a need for new roles at more than half of the companies in the Nordic region.

Has generative AI created a demand for adding new roles in your organization?



	Finland	Sweden	Norway	Denmark
Yes	36%	53%	59%	55%
No	47%	32%	25%	26%
I don't know	11%	15%	9%	19%

In a Global Perspective

Worldwide, 69 percent of executives believe that AI will lead to the emergence of new job roles.

Source: Capgemini Generative AI Global Survey, April 2023

Results

04 Potential industry perspective

Impact of generative AI today

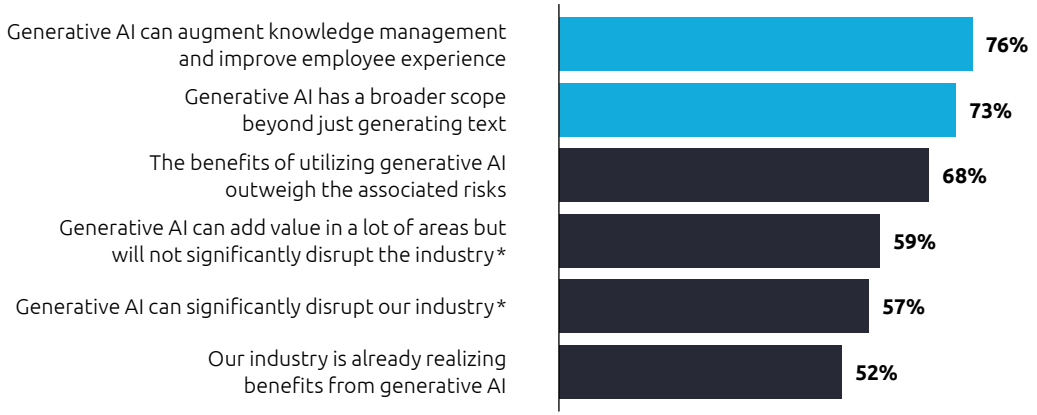
Organizations foresee significant impact from generative AI in augmenting knowledge management and improving employee experience. They also acknowledge its broader scope beyond text generation. In Finland generative AI is seen as contributing higher in these two areas. Predominant in all countries is the view that the benefits from using generative AI outweigh the associated risks.

In a Global Perspective

Worldwide, 21 percent of executives believe that generative AI can significantly disrupt their industries.

Source: Capgemini Generative AI Global Survey, April 2023

To what extent do you agree with the below statements on the potential of generative AI?
(Scale of 1–7; percentage of respondents that picked 5, 6 or 7)



	Finland	Sweden	Norway	Denmark
Generative AI can augment knowledge management and improve employee experience	94%	69%	78%	55%
Generative AI has a broader scope beyond just generating text	93%	60%	81%	49%
The benefits of utilizing generative AI outweigh the associated risks	69%	60%	77%	60%
Generative AI can add value in a lot of areas but will not significantly disrupt the industry*	63%	55%	65%	47%
Generative AI can significantly disrupt our industry*	54%	47%	70%	55%
Our industry is already realizing benefits from generative AI	39%	53%	60%	57%

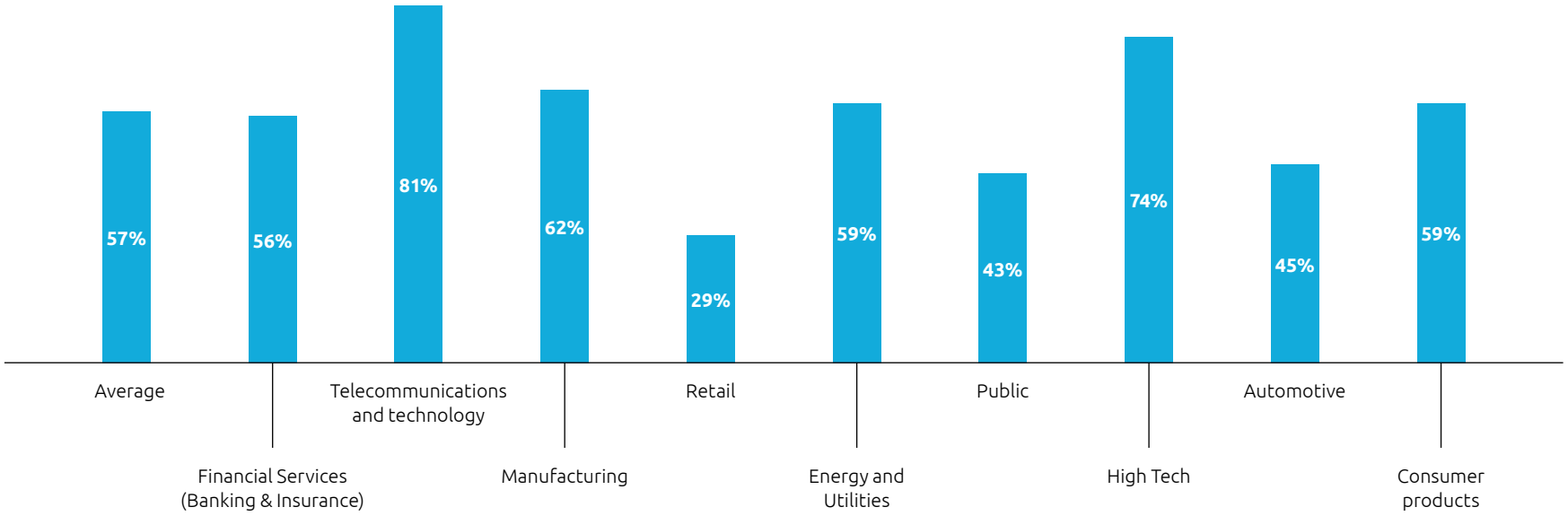
* The percentages of these two questions may add up to more than 100% because of the answers being on a 7 grade scale.

Impact of generative AI today – per sector

In Q1 2023, per the previous page, 21 percent of global executives held the belief that generative AI would disrupt their industry. In Q1 2024, around 57 percent of the Nordic executives were of a similar view, indicating that the understanding of the practical implications of the technology has deepened. Breaking it down per sector, executives within the telecom and high tech sectors expect significant disruption at 81 percent and 74 percent, respectively.

To what extent do you agree with the below statements on the potential of generative AI?
(Scale of 1–7; percentage of respondents that picked 5, 6 or 7)

The chart below shows the responses per sector specifically for the answer option; "Generative AI can significantly disrupt our industry".



Impact of generative AI on future work

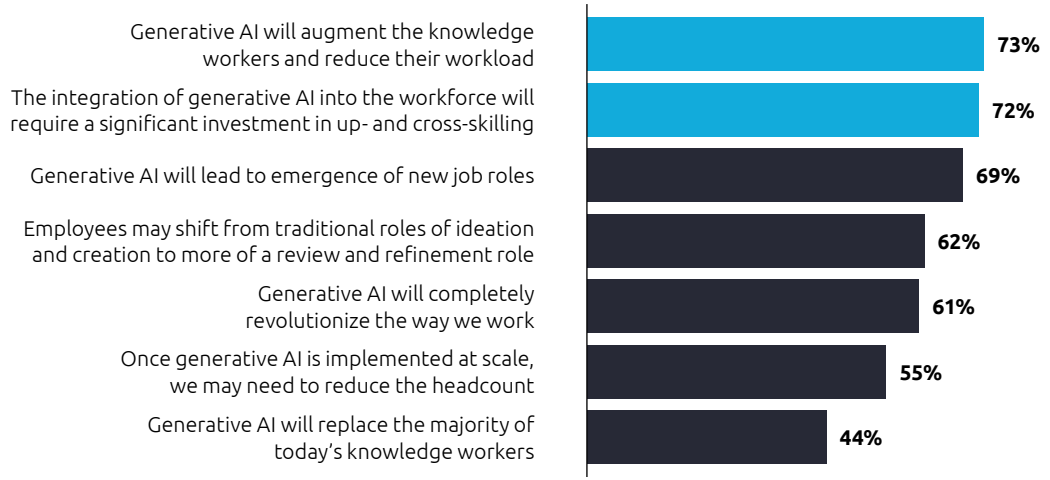
Nordic organizations believe generative AI will augment knowledge workers, necessitating significant investment in upskilling, and foresee the emergence of new job roles as the way of work evolves. In Finland they see upskilling needs to a larger extent than the other countries, but also have a stronger belief in higher efficiency and reduced workload.

In a Global Perspective

Worldwide, 60 percent of executives believe that the way work will be revolutionized.

Source: Capgemini Generative AI Global Survey, April 2023

To what extent do you agree with the below statements regarding the potential impact of generative AI on future of work?
(Scale of 1–7; percentage of respondents that picked 5, 6 or 7)



	Finland	Sweden	Norway	Denmark
Generative AI will augment the knowledge workers and reduce their workload	89%	65%	76%	58%
The integration of generative AI into the workforce will require a significant investment in up- and cross-skilling	86%	56%	78%	62%
Generative AI will lead to emergence of new job roles	80%	63%	78%	49%
Employees may shift from traditional roles of ideation and creation to more of a review and refinement role	71%	58%	69%	47%
Generative AI will completely revolutionize the way we work	57%	60%	71%	53%
Once generative AI is implemented at scale, we may need to reduce the headcount	57%	56%	64%	38%
Generative AI will replace the majority of today's knowledge workers	25%	44%	55%	53%

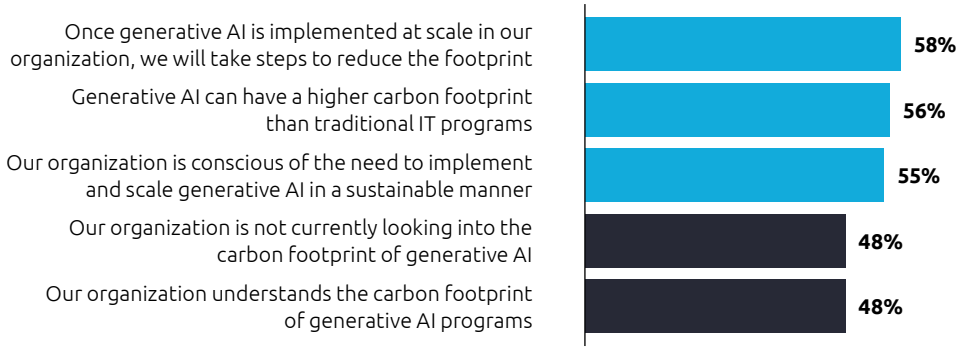
Results

05 Sustainability of generative AI

Generative AI sustainability

Nordic organizations show readiness to reduce the carbon footprint upon full implementation of generative AI, emphasizing sustainability efforts. They also acknowledge the potential for generative AI to have a higher carbon footprint in comparison to traditional IT programs.

To what extent do you agree with the below statements on the carbon footprint of generative AI?
(Scale of 1–7; percentage of respondents that picked 5, 6 or 7)



	Finland	Sweden	Norway	Denmark
Once generative AI is implemented at scale in our organization, we will take steps to reduce the footprint	63%	52%	67%	47%
Generative AI can have a higher carbon footprint than traditional IT programs	44%	59%	71%	45%
Our organization is conscious of the need to implement and scale generative AI in a sustainable manner	57%	52%	61%	49%
Our organization is not currently looking into the carbon footprint of generative AI	38%	40%	64%	47%
Our organization understands the carbon footprint of generative AI programs	28%	55%	63%	42%

In a Global Perspective

Worldwide, 78 percent of executives are aware of the greater carbon footprint from generative AI.

Source: Capgemini Generative AI Global Survey, April 2023

Foresights into tomorrow

In conclusion, this is what Nordic enterprises aiming at successful generative AI implementation envisions. These focused efforts will equip Nordic enterprises with the tools and strategies needed to embark on a successful generative AI journey. This will help to usher in an era of innovation, ethical leadership, and sustainable growth.

Data excellence as priority

Sustained investments in impeccable multi-source data aggregation and stringent adherence to data privacy regulations will ensure the integrity necessary for effective generative AI utilization.

Talent empowerment and skill transformation

Strategic talent recognition and robust training programs will empower the workforce for seamless adaptation to evolving roles, crucial for maximizing the potential of generative AI.

Strategic integration for competitive edge

Leveraging generative AI strategically within core business functions such as sales, marketing, and product development will pave the way for competitive differentiation and market leadership.

Sustainability as a core tenet

Integrating sustainability considerations into generative AI strategies and technology choices will align enterprises with responsible corporate practices and societal expectations.

Agile governance and regulatory adherence

Agile governance frameworks that adapt to evolving industry dynamics, coupled with stringent adherence to regulatory mandates, will ensure long-term success and compliance.

Study design & execution

The results are derived from a robust sample of 271 interviews, comprising C-level decision-makers well-versed in the realm of generative AI.

Target group

C-Level executives within medium-to-large Nordic companies. The target group should work operationally in businesses and preferably have insight into what happens in the boardroom.

Length of survey

15-45 minutes.

Data collection

Web and face to face interviews, over a period of 3 months.

Number of interviews

In total: 271;
Finland 71, Sweden 62, Norway 85 and Denmark 53.

Survey

Nordic survey results published in June 2024. The survey was conducted based on the framework of Capgemini Generative AI Global Survey: "Harnessing the value of generative AI: Top use cases across industries", published by Capgemini Research Institute, April 2023.

Targeted industries

Retail, telecom, high tech, automotive, life science, manufacturing, public, energy and utilities, and financial services.

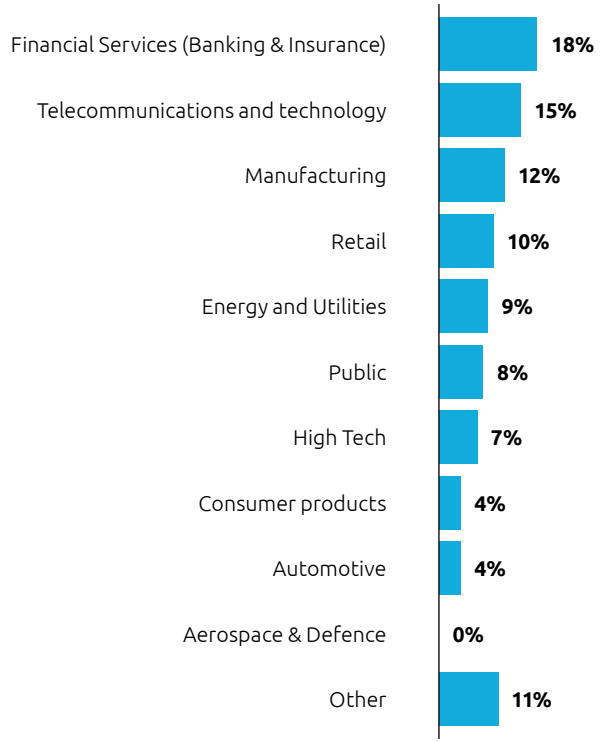
Interpretative description of results

Nordic average in diagram, with blue colour to highlight insights. Numbers marked in purple/orange are significantly higher/lower than the Nordic average, at the 95% significance level. Cumulative rounding effects may cause totals to differ from 100%.

Profiling

271 interviews with C-Level executives that work operationally in businesses at medium-to-large Nordic companies, with insight into what happens in the boardroom.

Industry - In which of these sectors does your organization primarily operate?



	Finland n=71	Sweden n=62	Norway n=85	Denmark n=53
Financial Services (Banking & Insurance)	20%	19%	20%	13%
Telecommunications and technology	18%	15%	20%	6%
Manufacturing	13%	15%	13%	6%
Retail	10%	11%	7%	15%
Energy and Utilities	14%	5%	13%	0%
Public	10%	10%	6%	9%
High Tech	0%	11%	4%	17%
Consumer products	3%	2%	5%	9%
Automotive	0%	5%	4%	9%
Aerospace & Defence	0%	0%	0%	2%
Other	13%	8%	9%	13%

If you have any questions or would like a personalized walkthrough of the report, please reach out to:

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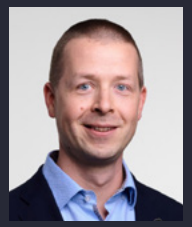
Finland



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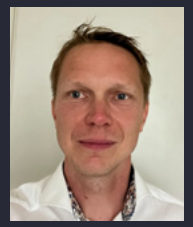

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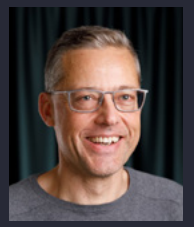

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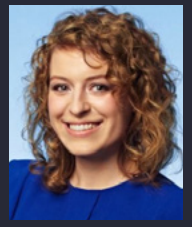

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