



The orchestrator: Who's conducting your enterprise?

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1. The AI Imperative Demands Coordinated Execution

The 2026–2027 Decision Window

By 2030, the enterprises that look most advanced on paper may be the ones in the most trouble. Balance sheets still look strong; they moved early on AI. But beneath the surface lies growing chaos: disconnected AI initiatives, conflicting data pipelines, multiple clouds running in parallel, and systems that don't reflect how the business actually operates. What looked like innovation was really accumulation – and by the time that became obvious, the strategic options had already begun to close. This unsustainable pattern is already taking shape in most enterprises today.

The good news is that stalled transformation isn't inevitable: Enterprises are entering a narrow decision window – 12-18 months – to prevent it. The answer isn't another platform, another pilot, or another AI tool. The answer is orchestration – the discipline of aligning platforms, data, AI, and people toward shared business outcomes. At the center of that discipline is the orchestrator: the leader or function with the visibility and authority to make it happen. The organizations that establish this role now will be the ones that pull ahead.

The choices made in this window regarding AI, data architecture, and cloud operating models will shape not only near-term performance but long-term competitiveness. AI adoption is the most visible accelerant, with demand doubling every nine months.¹ Spending is on track to more than quadruple from \$24.9B in 2024 to an estimated \$110B in 2027.² But AI is only one of four forces converging at once: technological acceleration, geopolitical pressure, economic uncertainty, and societal change. Enterprises that respond coherently will compound their advantage. Those that don't will institutionalize fragmentation.



**12-18
months**

The decision window for enterprises to prevent institutionalized AI fragmentation

Four Forces Converge



Technological
Acceleration



Geopolitical
Pressure



Economic
Uncertainty



Societal
Change

¹ Pilz, Konstantin F., et al. "Trends in AI Supercomputers." *arXiv*, 2025. Data given that all existing industry capacity is basically committed.

² Futurum Research, AI Platforms Market Forecast, 2024–2030.

From Connected to Coordinated

Every CXO has already placed major platform bets they need to see pay off – Salesforce, SAP, Adobe, Oracle, AWS. Those decisions were often right for the moment, and they're not going away. What's changed is that these environments now have to work together in ways they were not initially designed to.



"You can't just throw it [AI] on top of your current operating model.... in order to truly AI-enable the enterprise, it's not just the tools and technology, it's the people and processes too."

– Principal IT Infrastructure Architect, health insurance firm (ETR Insights, Observability Tools Panel, May 2026)

A CIO thinks in terms of ERP, infrastructure, and supply chain. A COO focuses on execution and resilience. A CFO focuses on transparency, discipline, and return. Each of these perspectives is valid. But none, on its own, is sufficient, because the outcomes the business cares about most cut across organizational boundaries.

The data is stark: 82% of IT leaders say integration challenges are holding back their AI initiatives, while 64% are concerned about their organization's ability to meet near-term AI implementation goals.³ Futurum Research confirms this pattern: When enterprise data leaders are asked to name their single biggest organizational challenge, the top answers are all coordination failures – keeping pace with data growth, integrating disparate sources, and lacking the resources or skills to manage it all. And when asked what they're most dissatisfied with in their current data stack, data quality, trust, and governance top the list, ahead of AI effectiveness, integration complexity, scalability, and total cost of ownership combined.⁴ Similarly, CIOs heading into 2026 continued to rank legacy system integration among their top five challenges.⁵

This necessary strategic coordination is orchestration: a properly aligned system of capabilities, not just a collection of systems. Orchestration isn't the same as integration. Integration connects systems so they can talk to each other. Orchestration determines whether those systems actually produce outcomes together. Most enterprises today are integrated. Very few are coordinated. Orchestration makes those systems, workflows, and decisions work as part of a single enterprise, pointed toward shared outcomes and continuously improving. It aligns strategy, operating models, platforms, data, and security controls into one coordinated system.



Orchestration separates 'integrated' enterprises of connected parts from 'orchestrated' high-performance enterprises with coordinated outcomes.

³ 2026 Connectivity Benchmark Report, MuleSoft

⁴ Futurum Research, Data Intelligence, Analytics, and Infrastructure Decision Maker Survey, 1H 2026.

⁵ Futurum Research, CIO Insights Survey, Q4 2025.



Why The Gap Is a Leadership Problem

AI capability is no longer scarce, with over two-thirds of enterprises spending on AI/ML and achieving a net growth score of 50% on AI spend.⁶

AI is clearly spreading across the enterprise, but responsibility for activating and governing it gets distributed across the executive team: technology, finance, operations, HR, and security. Every role drives a piece of the work; the CEO owns the result, but no one beneath them directly owns the system that produces it or its business result.

That's the structural problem, and it shows up in the numbers: expectations are outpacing execution. While 79% of executives expect AI to contribute significantly to revenue by 2030, only 24% can clearly identify where that revenue will come from.⁷ As of May 2026, 49.6% of enterprises have not realized measurable ROI from AI spending and 47.9% do not yet believe AI's value exceeds its cost – and that's barely moved in 18 months, despite surging adoption.⁸ Meanwhile, 43% of enterprises cite unclear business value or ROI as a top GenAI adoption challenge.⁹ In fact, the leading data-specific cause of AI project failure is MLOps complexity, followed closely by difficulty integrating existing systems.⁹

The pattern is clear: The constraint today is no longer AI capability, it's the enterprise's ability to coordinate around it. As AI becomes foundational, someone has to own the work of making everything fit together as an operating model requirement – and keep it working together as technology, regulation, and markets evolve. It's no surprise, then, that 68% of leaders view current organizational structures as impediments to realizing AI's full value.⁸



The orchestration gap is a leadership challenge before it is a technology one.

The question of who owns orchestration is what separates organizations that accumulate technology from those that build lasting advantage. When no one owns system coherence, complexity compounds on itself as systems evolve independently. Worse, each new system adds exponential coordination costs if handled ad hoc. Incentives diverge while risk accumulates in the seams. And decision velocity slows at exactly the moment when speed matters most.

⁶ ETR Technology Spending Intentions Survey, ML/AI sector, April 2026.

⁷ IBM Institute for Business Value. "The enterprise in 2030." IBM Research Study, 2026.

⁸ ETR AI Product Series, market-level, May 2026

⁹ Futurum Research. AI Platforms Decision Maker Survey, IH 2026.

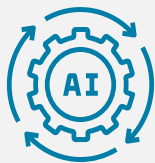
The Missing Orchestrator: The Enterprise's Conductor

Most enterprises already have capable leaders, strong platforms, and active modernization programs. **What they're missing is an orchestrator: A leader or function with the visibility and authority to move all these elements toward a single outcome.**

Without an orchestrator, AI proliferates without a clear connection to business outcomes. Individual teams deploy new capabilities, but governance becomes inconsistent, security struggles to keep pace, and costs rise without a corresponding increase in customer or business value. Even organizations making significant back-end modernization investments often deliver fragmented front-end experiences because no one is coordinating how those investments work together. It's a challenge CEOs increasingly recognize: 50% say the pace of AI investment has left their organizations with disconnected or piecemeal technology environments.¹⁰

Each AI system works in its own lane, yet the enterprise still disappoints the customer. The platforms didn't fail. The enterprise lacked someone responsible for coordinating them.

Over time, AI does not fail dramatically; it underdelivers quietly, leaving the enterprise with more complexity and less strategic flexibility than it started with.



*Orchestration is no longer optional or aspirational:
AI has made it a live operating requirement.*



¹⁰ IBM Institute for Business Value, 2025 CEO Study: 5 Mindshifts to Supercharge Business Growth. IBM, 2025. Survey of ~2,000 global CEOs

The Core Question for Enterprise Leaders: Adoption vs. Transformation

The difference between AI adoption and AI transformation is now decisive:

- AI adoption inserts AI into existing processes through pilots and isolated deployments.
- AI transformation reimagines processes, decision points, and operating models so that intelligence improves outcomes, lowers structural cost, and expands strategic flexibility.

The most important question for leaders isn't which new tool to buy next; it's whether the enterprise is operating AI-first or just AI-adjacent. Coordination is more important than capability for determining success.



The enterprises that pull ahead won't be the ones with the best platforms. They'll be the ones with the clearest answer to the question: "Who is conducting?"

The Decision in Front of You

Enterprises need a clear view of where they're going and what it will take to orchestrate across what they already have. The task isn't to replace every prior platform decision. It's to make those investments work together toward outcomes no single system can produce alone. Orchestration is the crucial leadership capability that closes that gap. Defining who has the visibility, authority, and capability to make platforms work together is more important than which to buy.

And this isn't theoretical: Futurum Research finds that while 52% of enterprises rate themselves ahead of competitors on AI capability, only 13% have reached a stage where AI actually transforms their operating model – a gap that rarely closes without someone owning the coordination.¹¹ But that coordination rarely materializes organically; it typically requires a partner with the vantage point across platforms, data, and operating models that no single internal function can replicate.

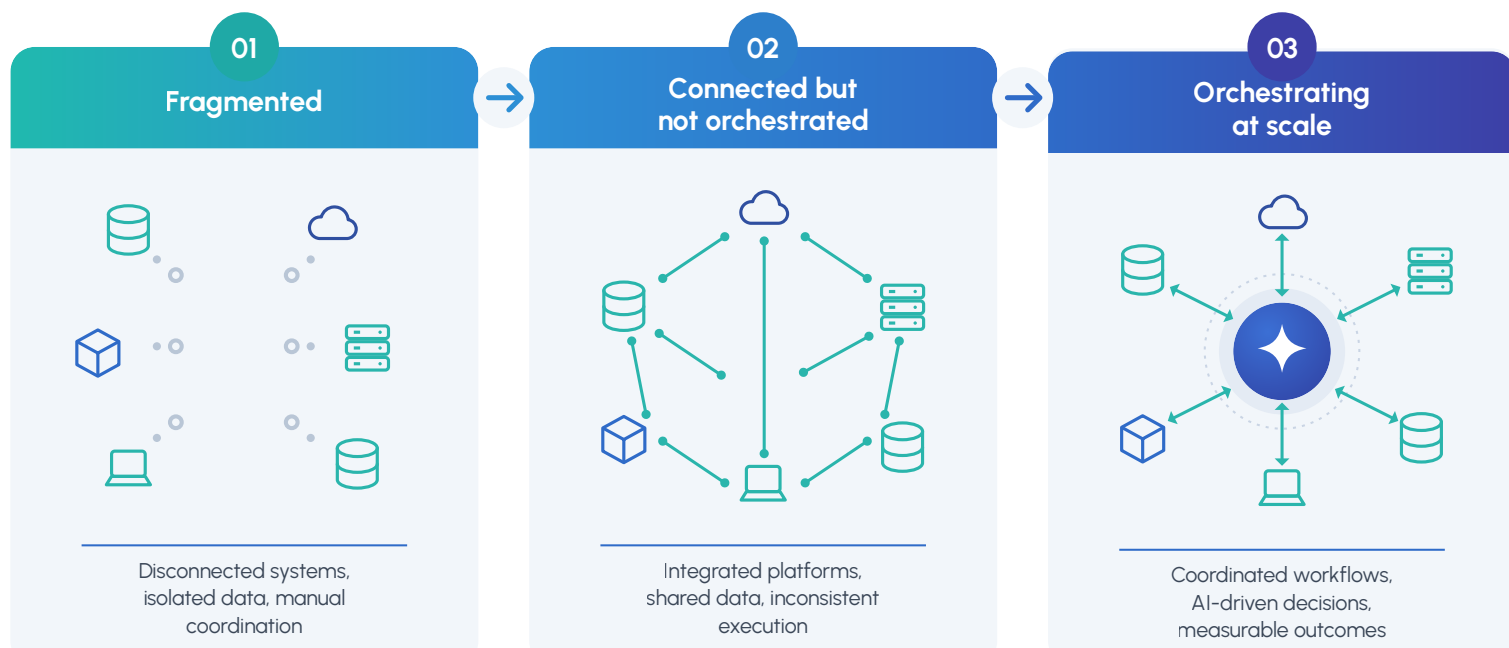


¹¹ Futurum Research, AI Platforms Decision Maker Survey, 1H 2026.



2. The Three Stages of Orchestration Maturity

Orchestration maturity falls into three broad stages. These stages aren't rigid categories; most enterprises show traits of more than one. But they give leaders a useful way to locate where they are and what needs to change and where to focus next.



Stage 1: Fragmented

Platforms and Data Exist in Silos

In the first stage, enterprises have strong technology foundations but no coherent cross-platform view. Different parts of the organization have chosen platforms that serve their own needs well. Each choice makes sense on its own, but collectively they create a landscape where the enterprise can't easily connect data, workflows, or decision-making across systems.

AI ambitions often stall here. Teams build promising models, but the data needed to operationalize them is scattered across systems that were never designed to work together. Governance becomes inconsistent. Integration work expands faster than delivery teams can absorb. Leadership senses the organization has the right ingredients, but those ingredients aren't yet combining into meaningful outcomes.

Fragmentation here is not caused by bad decisions. It emerges because no one has the cross-platform visibility required to align those decisions.

Stage 1 - FRAGMENTED



Maturity Example: Multi-Vendor Modernization

An organization migrates critical workloads to the cloud while upgrading core ERP applications or supply chain systems. Data initiatives and AI pilots are simultaneously launched in parallel environments. Each program progresses successfully within its own domain, yet the enterprise struggles to connect insights across platforms.

Stage 2: Connected But Not Orchestrated

The Parts Exist, the Orchestrator Is Missing

In the second stage, enterprises start addressing fragmentation through modernization and integration. The result is connected platforms, free-flowing data, and expanding AI capabilities. What's missing is the coordinating function that gets all of these pieces moving toward a shared outcome.

Stage 2 - CONNECTED BUT NOT ORCHESTRATED



Maturity Example: Disjointed Back- vs Front-End Integration

An enterprise has invested heavily in modernizing its technology foundation. Core systems have been upgraded, cloud architectures strengthened, and data platforms improved. On paper, the organization is better equipped to support AI and automation, but business processes and customer experiences remain fragmented. AI capabilities exist within individual functions rather than working together, limiting the organization's ability to translate technical progress into enterprise-wide business outcomes.

Stage 3: Orchestrating at Scale

When the Orchestrator Role Is Working

In this stage, orchestration becomes an explicit leadership capability. Enterprises at this stage still run complex ecosystems of platforms and partners. They still rely on multiple clouds, specialized applications, and diverse data sources. But those elements are coordinated through a clear understanding of how they contribute to enterprise outcomes. Transformation stops being a series of disconnected initiatives. Instead, changes across technology, process, and workforce evolve together.

The organizations doing this well, such as those identified in the next section, coordinate modernization across infrastructure, applications, data, and workforce capabilities at the same time. New capabilities come online without destabilizing existing operations. Instead of large disruptive change programs, the enterprise evolves continuously.

The defining characteristic of this stage is leadership that sees across the entire system and guides it toward shared outcomes – one leader or function with visibility across the full system and the authority to make trade-offs that no single domain leader can make alone.

Stage 3 - ORCHESTRATING AT SCALE



Maturity Example: Coordinated Enterprise Execution

An enterprise has moved beyond isolated AI deployments and uses an orchestrator to coordinate decisions across business and technology teams. Data, governance, and security are aligned with business priorities, allowing AI insights to flow directly into operational processes. Instead of managing a portfolio of disconnected pilots, AI has become part of how the organization executes, adapts, and scales.

Locating Your Organization on the Journey

Ask not which platforms you've deployed, but whether there's coordinated visibility and authority to make them work together.

DO

Address orchestration directly. Align leadership decisions, data architectures, and platform strategies so AI and digital capabilities reinforce one another.

DON'T

Default to acquiring more tools or launching more pilots. This compounds fragmentation, limits innovation, and adds technical debt.

See "Next Steps" on page 13 for questions to help assess your organization's maturity.

3. Orchestration in Action

Enterprise transformation doesn't happen in fragmented or isolated environments. It unfolds within complex, well-coordinated organizations that must keep changing and growing without disrupting the business.

The following case studies from IBM show how the value of AI and platform orchestration is shaped by enterprise coordination across different maturities, industries, and constraints. Based on interviews conducted by Futurum Research, these examples trace the orchestration journeys of three distinct organizations. Three common challenges emerge:

- Modernizing complex, multi-vendor environments without disrupting operational stability.
- Translating increasingly connected platforms into coherent customer and business outcomes.
- Orchestrating transformation simultaneously across people, process, and technology.

Riyadh Air: Building a Digital-Native Enterprise From Day One

Rather than modernizing around legacy constraints, [Riyadh Air built a digital-native airline from the ground up](#), using orchestration and integration as strategic capabilities. Working across more than 60 technology partners and 1,800 integrations, IBM Consulting helped establish a unified architecture that enabled rapid execution, including campaign deployment in under 24 hours with a team of fewer than 10 people. The result is a future-ready operating foundation that delivers speed, flexibility, and scalability before the airline has even reached full revenue operations.

Nestlé: Scaling AI Through Accountability and Outcome-Based Delivery

[Nestlé's Digital Product Services transformation](#) demonstrates that AI-driven productivity gains require more than new tools; they require a new operating model. Partnering with IBM Consulting, Nestlé consolidated accountability under strategic partners and adopted an outcome-based commercial framework. Nestlé achieved a 77% reduction in critical incidents, a 20% improvement in time-to-restore, and established a model targeting 15% annual cost reduction. The case illustrates how governance, accountability, and AI-enabled delivery can work together to create sustainable operational improvements across a complex global IT environment.

IBM Client Zero: Turning Enterprise AI Into Measurable Business Value

Across these organizations, orchestration is the variable that separates sustained transformation from stalled pilots. It's also the discipline IBM has applied to itself.

[IBM's Client Zero initiative](#) offers a real-world example of AI orchestration at enterprise scale. By applying AI, automation, and workflow redesign across its own global operations, IBM generated \$4.5B in annualized productivity savings, reduced HR operating costs by 40%, cut IT support volumes by 74%, and delivered more than \$600M in IT cost savings. The initiative highlights a critical lesson for enterprises: meaningful AI outcomes come not from isolated deployments, but from combining governance, workflow transformation, and orchestration into a repeatable operating model.



4. Starting Points for Leaders

Orchestration Is a Leadership Job – and the Window Is Closing

The orchestrator is the one leader with authority to make cross-domain trade-offs that hold, measured on the enterprise outcome rather than any single domain's. That authority is the role. It is the power to set shared direction across platforms, data, and AI, and to make the call stick when domains pull in different directions.

The orchestrator owns the seams between systems, which is where enterprise outcomes actually live. When the pricing model recommends a discount the inventory system can't fulfill, the orchestrator decides which side bends, and the decision holds across both. Domain leaders each own one system. The orchestrator owns the result they produce together and answers for it in a way no domain leader can.

Two things make the role real: budget authority over the platform owners and a mandate tied to enterprise outcomes instead of a domain scorecard. With both, the orchestrator enforces one operating model across the enterprise. The governance data points straight at this. Only 41% of enterprises have enterprise-wide AI governance¹², and closing that gap is the orchestrator's job: put one operating model in place and hold the enterprise to it.

The role takes different forms depending on the organization. A COO is the strongest fit when AI value is primarily operational – supply chain, service delivery, cost structure – because they already own cross-functional execution. A CTO or CIO with an expanded mandate works in tech-forward enterprises where platform architecture and AI strategy are inseparable, provided accountability shifts from IT delivery to business outcomes. A Chief AI Officer is increasingly common but only functions as an orchestrator if given real budget authority over platform owners; without it, the role becomes advisory. A Chief Transformation Officer is the purpose-built option for enterprises running a major change program, with a natural mandate to align platforms, data, and workforce simultaneously.

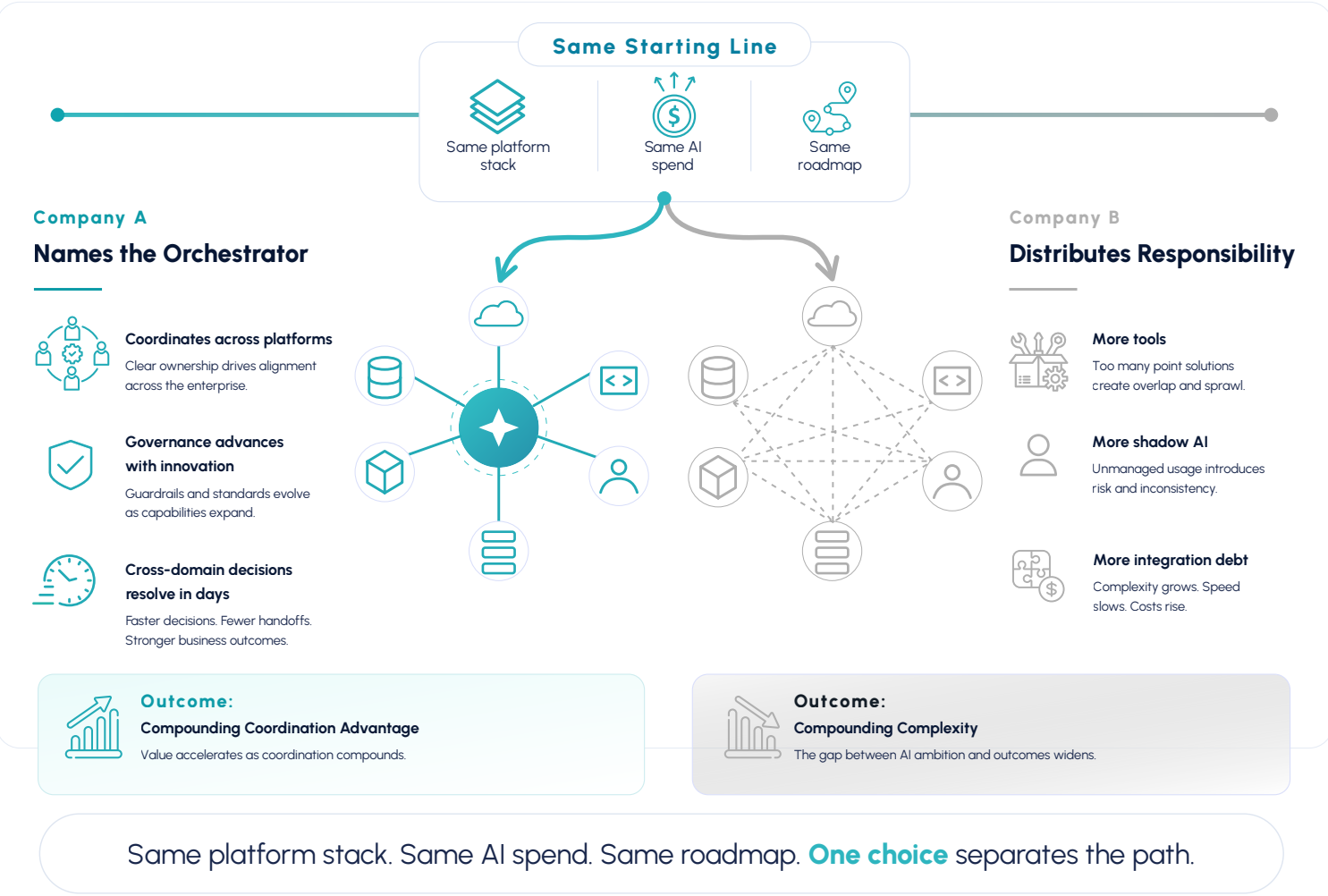
That means naming the orchestrator explicitly – not as a committee, but a single point of accountability. The orchestrator doesn't replace domain leaders; they ensure domain leaders are rowing in the same direction. Establishing that role, and equipping it with the cross-platform visibility it demands, is where an experienced orchestration partner becomes not just helpful but necessary.

¹² Futurum Research. AI Platforms Decision Maker Survey, 1H 2026

The next 12-18 months will separate enterprises that look identical today. Picture two companies with the same platform stack, the same AI spend, and the same roadmap. One names an orchestrator with real trade-off authority in 2026. The other distributes orchestration across the executive team and calls it collaboration.

By 2028, the first has built a coordination capability that compounds over time: initiatives reinforce one another, governance evolves with innovation, and cross-domain decisions are resolved in days. The second has compounded complexity instead; more tools, more shadow AI, and more integration debt, widening the gap between AI ambition and business outcomes. Same starting line. One decision changed the trajectory.

Same Starting Line. Different Destination.
The enterprise's decision bends the curve.



Competitive advantage in this era won't come from having the most advanced systems. It will come from how effectively the enterprise can coordinate them into outcomes that matter most.



Next Steps

The gaps described in this report point to a stubborn, familiar problem: most organizations can't orchestrate themselves. Getting it right usually requires an external partner with the vantage point, experience, and authority to act as a forcing function – keeping leaders coordinated and decisions transparent. Here are the four questions that will tell you where your orchestration gap actually is. Bring them to your next CXO meeting:

- Where do platforms, data sources, and AI initiatives currently sit across the organization?
- How easily can critical data move between the systems that depend on it?
- Which business outcomes are being held back by fragmentation across systems or teams?
- Who has the authority and accountability to coordinate across all of it?

If your leadership team can't answer the fourth question in one sentence, then you have an orchestration gap, and it's already working against you. The next step is naming your orchestrator: identifying or appointing the leader who will own cross-platform coherence, resolve trade-offs between domains, and keep AI, data, and execution aligned to business outcomes. The objective is a single point of enterprise accountability with the authority to align decisions across functions.

The decision must be made now, but its business impact will unfold over the next three years as enterprises build a coordination capability their competitors don't have. Enterprises that don't will spend the same three years accumulating tools and wondering why the ROI isn't showing up. Both paths compound. Only one of them pays off.

Read more: [Is your enterprise missing an orchestrator?](#)

Dive deeper into the signs to look for with Caroline Roche, IBM Consulting's data and hybrid cloud expert.

Important Information About This Report

AUTHORS

Mitch Ashley

Vice President & Practice Lead Software
Lifecycle Engineering | The Futurum Group

PUBLISHER

Futurum Research

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CONTACT INFORMATION: The Futurum Group LLC | futurumgroup.com | (833) 722-5337