



Accelerating success in technology, media, and telecoms

5 essential actions from the PwC
Global Compliance Survey 2025

PwC's Global Compliance Survey 2025



Introduction

The technology, media and telecoms (TMT) industry is at the forefront of reinvention, leading the charge on AI and helping drive transformation and innovation across the many industry ecosystems that rely on them. This also puts them on the front line in tackling some of the most complex and fastest evolving compliance risks, including those related to cyber security, AI, data privacy and protection, and intellectual property. In fact, TMT respondents in our survey ranked data privacy and protection as their top compliance risk, which was the highest of all industries (61% for TMT vs 51% industry average).

The importance of TMT companies to the global digital infrastructure, data flows and value chains—and the businesses and customers that rely on them—means that regulatory scrutiny can be intense.

The multidimensional ‘tapestry’ of regulation and industry ecosystems is tightly woven together, meaning various risks and rules are connected, with issues having the potential to ‘ripple’ out and impact other sectors. Many regulatory themes, such as those relating to AI, have a broad applicability across TMT and regional or territory rules (e.g. EU AI Act) make navigating them difficult (even between states in the US).

This is further amplified by the broader geopolitical and socioeconomic pressures that governments are tackling, increasing the need to upgrade and retool infrastructure (e.g. telecoms networks), build trust in information (e.g. media), and construct the guiderails for AI innovation. PwC US's [Next in tech 2025: Thriving amid disruption with data, AI and agility](#) explores some of these trends further.

This puts compliance leaders at the centre of the new risk landscape, juggling competing priorities—helping their organisations innovate and deploy new products and services faster (to win the arms race around technology advancement, especially the ‘AI arms race’), whilst navigating new compliance threats coming from all directions. The upside competitive and commercial benefits are significant, but they will require new approaches to compliance, and a ‘pioneer’ mindset to unlock them.

Five actions that TMT compliance leaders can take now

- 01 | Plan for simplification and standardisation
- 02 | Build in compliance
- 03 | Position compliance as the technology vanguard
- 04 | Address the human dimension of technology
- 05 | Embrace the pioneer role

Plan for simplification and standardisation

Establish processes to help the business intake, assess and respond to compliance requirements in a repeatable and efficient way.

With the extent of change in the TMT industry, it is not surprising 81% of respondents felt that compliance requirements had become more complex in the last three years. Whilst complexity is nothing new, the pace of change in recent years is straining their ability to cope, particularly as different jurisdictions implement their own versions of regulations in areas like AI, data protection and cyber security. The 'layering' of complexity means that responding in the traditional way—more resources, more cost—is not viable, particularly as some TMT companies are pulling back on spending in the face of challenging markets and cost pressures, combined with the need to invest in new technologies. This is forcing many to shift their focus from response to preparation and build more sustainable and repeatable processes. This includes, for example:

- Processes to intake regulation, assess its impact, and quickly engage the business to address it
- Securing resources and mechanisms for 'horizon scanning' to look at forthcoming regulation/trends

- Protocols to establish (and resource) cross-functional project teams
- Nominating individuals in each function to support compliance activities
- Standardising procedures to monitor and report on the implementation of new requirements

It also involves revisiting existing controls (or groups of controls) to see if they can be streamlined, automated, or scaled back (e.g. if the risk profile has lowered) to free up resources to address new requirements. This includes remapping, combining, or centralising controls to address multiple regulations (one-to-many mapping). PwC US's [Risk and Compliance Reimagined](#) paper summarises ways in which some companies are changing their compliance models to help speed up and optimise their processes and reduce cost.

01

Build in compliance

Front-load compliance involvement in the development of new products and services and the design of systems and processes.

02

Those in the TMT industry are more likely than others to involve compliance in the development phase of new products and services (60% compared to the 55% average across all industries). It is difficult and inefficient to try to build compliance into products and services after development—or even worse, after launch. This requires compliance functions to be involved—and invited—earlier in discussions with business functions and R&D teams. This could involve, for example, mandatory protocols for the business to consult with Compliance to allow relevant risks to be considered and appropriate due diligence to be performed over initial concepts or designs. This is particularly important for global organisations who have to navigate different requirements

across multiple jurisdictions in order to sell and operate (61% of TMT respondents had a global remit). This requires compliance professionals who can engage the business at the right time with the right mindset, bringing innovative insights and ideas to help see risk differently and influence change. Our survey found that technology is also helping compliance functions to do things differently, including the identification of regulations (68%) and digital product lifecycle compliance (67%).

Earlier involvement of compliance should also extend to other internal initiatives too, where their input can be valuable, such as transformation in business operations and the workforce (our survey found that those in the technology sector are most likely to require the involvement of compliance expertise in workplace changes over the next three years (34%).

The upside is that it can save time and effort, preventing costly course corrections later in development (or post-launch) to comply with regulations—and avoid fines and loss of trust. It also provides the business with more confidence to move faster with innovation and change initiatives, including transforming technology.

Position compliance as the technology vanguard

Set a bold vision for how compliance will build and leverage technology and forge partnerships across the organisation.

03

For those in TMT, technological change is one of the biggest factors in determining investment in compliance (50%) and they are more likely to be piloting or using technology and AI for compliance compared to other industries. The top five areas included (TMT versus all industries):

Compliance technology overall	AI
• Risk assessment (82% vs 73%)	• Data and predictive analytics (35% vs 21%)
• Data and predictive analytics (76% vs 66%)	• Fraud detection (28% vs 19%)
• Issue tracking and follow-up (74% vs 64%)	• Risk assessment (26% vs 15%)
• Policy and procedure management (73% vs 64%)	• Training (25% vs 15%)
• Controls testing (73% vs 63%)	• Customer due diligence (24% vs 15%)

These results are understandable given the industry’s role in driving AI, with technology companies developing the AI models, software, platforms and infrastructure. This sets TMT apart as leaders in technology adoption and, whilst this is positive, the pace of change means that they cannot slow down—there is still work to do. As AI becomes more widely adopted across other industries, TMT companies will be expected to guide their customers through the new risk landscape that it forms, including educating regulators and enforcement agencies. This means that compliance functions have to both address AI risks in their own organisation and become proficient in using it to help manage compliance complexity.

Our survey found that whilst compliance technology has yielded a range of benefits for many TMT organisations, 32% say that technology itself is making compliance more challenging (e.g. new cloud, cyber and data

rules). This means that Compliance functions should have a perspective on how system and data flows in the organisation could be simplified or consolidated to reduce the compliance burden—for everyone’s benefit.

Practically, this will require compliance leaders to be bold, becoming ‘technologists’ that are comfortable in piloting new technology and contributing to cross-functional initiatives to design and implement it. They also need to have a clear vision of the future compliance operating model and technology infrastructure, and the investment needed in the mid- to long-term to achieve it. This includes the hard work needed to transform the processes and data flows that will ultimately determine how effective and efficient compliance is able to be.

Address the human dimension of technology

Check that your organisation's investment in compliance talent matches its technology ambition.

The adoption of compliance technology—and the ability to address technology risks—requires a commensurate investment in the training and development of the people leading the charge. This may mean significant changes for many organisations in the intensity, style, and approach to talent development, particularly given the degree of transformation technology is driving in many areas of the workforce (PwC's [AI Jobs Barometer](#) explores related themes on the impact of AI).

Our survey found that the top priorities for compliance skills in TMT included technology capabilities (45%) and AI skills (31%). Companies are relooking at their talent strategy and skills assessments to see if they

have the right balance between technical and soft skills and whether or not this really supports the organisational strategy in the mid- to long-term. This might involve changes to training, movement and sharing of skills across functions, and embedding more compliance expertise in the first line—closer to front-line development and sales.

A number of technology companies have had to recalibrate their workforce in recent years in response to commercial pressures and consumer demand, but the need to get the right skills remains as important as ever.

Embrace the pioneer role

Refresh the compliance mandate and charter to reinforce its commitment to value creation.

05

The cross-fertilisation of industry eco-systems is particularly relevant to those in TMT as they drive innovation across various different sectors. PwC's 28th Global CEO Survey found that almost 40% of CEOs said their companies started to compete in new sectors in the last five years. Some technology companies, for example, have established payment or other financial platforms and have entered the crypto market. Whilst staying ahead of the competitive curve is more important than ever, it might also mean companies are competing in unfamiliar areas or grappling with regulation that they have little experience of.

Our survey found that compliance leaders in TMT are playing an increasingly important role in supporting their company's strategic initiatives. Respondents think that, for example, compliance capabilities will be needed in relation to:

- Digital transformation (69%)
- Delivering new products and services (51%)
- Entering new markets (47%)
- Deals and corporate transactions (47%)
- New partnerships and alliances (45%)

The good news is that the door is open for Compliance Leaders to be bold and help drive strategic change. This should start with their mandate and charter, being clear on what role its stakeholders expect it to play, and building the right strategy, resource model, and investment case to meet these expectations.

Further reading

Read the full PwC Global Compliance Survey 2025 [here](#). To learn more about related topics, please see:

- [Next in tech 2025: Thriving amid disruption with data, AI and agility](#)
- [AI Jobs Barometer](#)
- [Risk and Compliance Reimagined](#)
- [Productivity or pioneering? Your industry’s GenAI adoption play](#)
- [2025 Outlook: Global M&A Industry Trends in Technology, Media & Telecommunications](#)
- [Seven urgent innovation priorities for telecom CEOs](#)

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