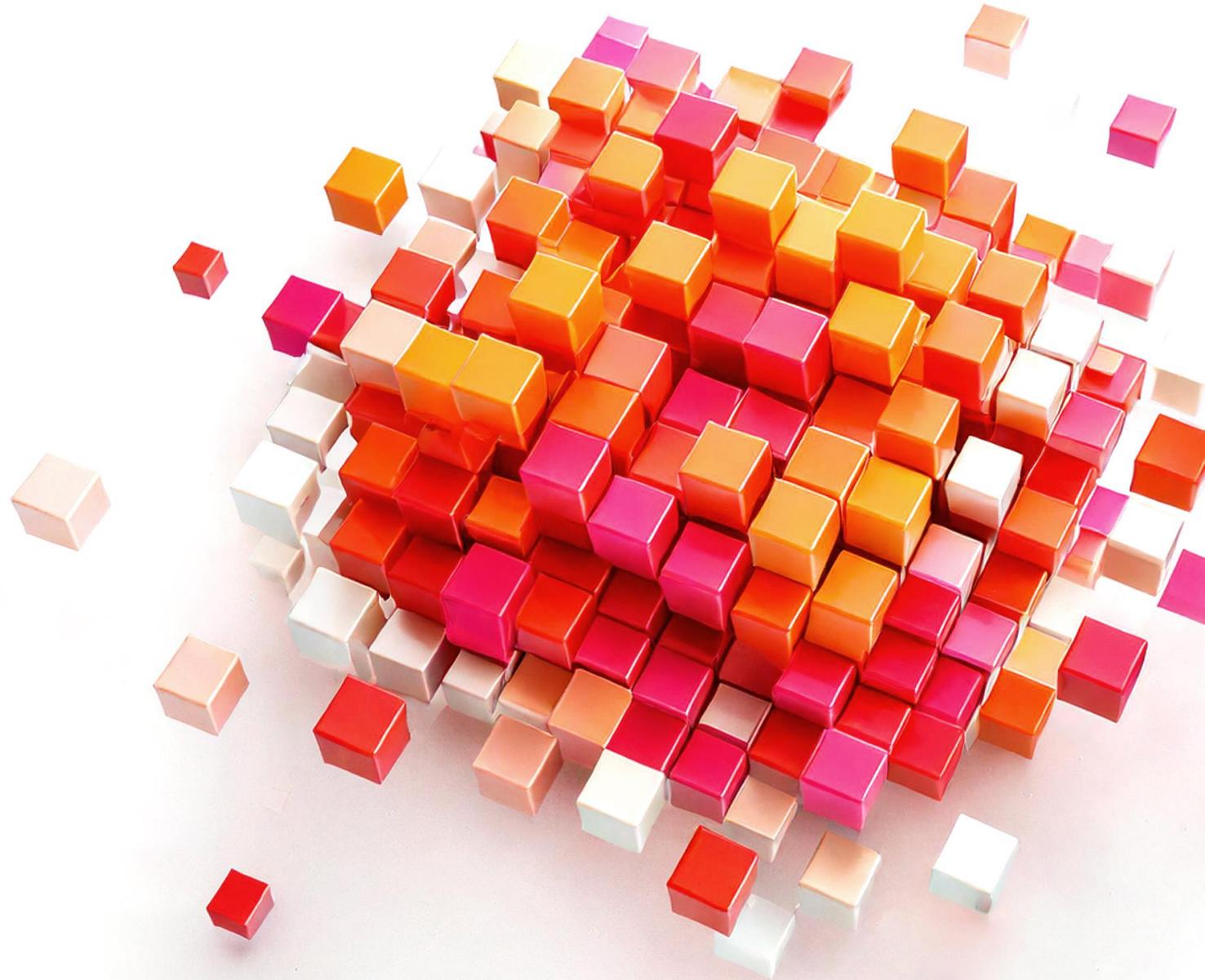


Data Strategy in the GenAI Age

Should your framework dissolve or evolve?



Moderators for today's masterclass about “Data Strategy in the GenAI era”



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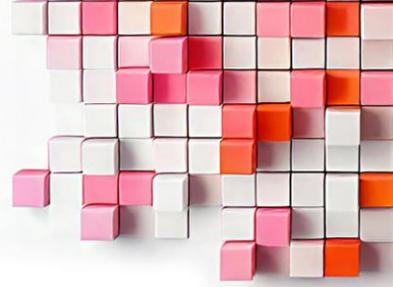
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Every society and business will be AI-fueled by 2030 – businesses need to act now to stay competitive

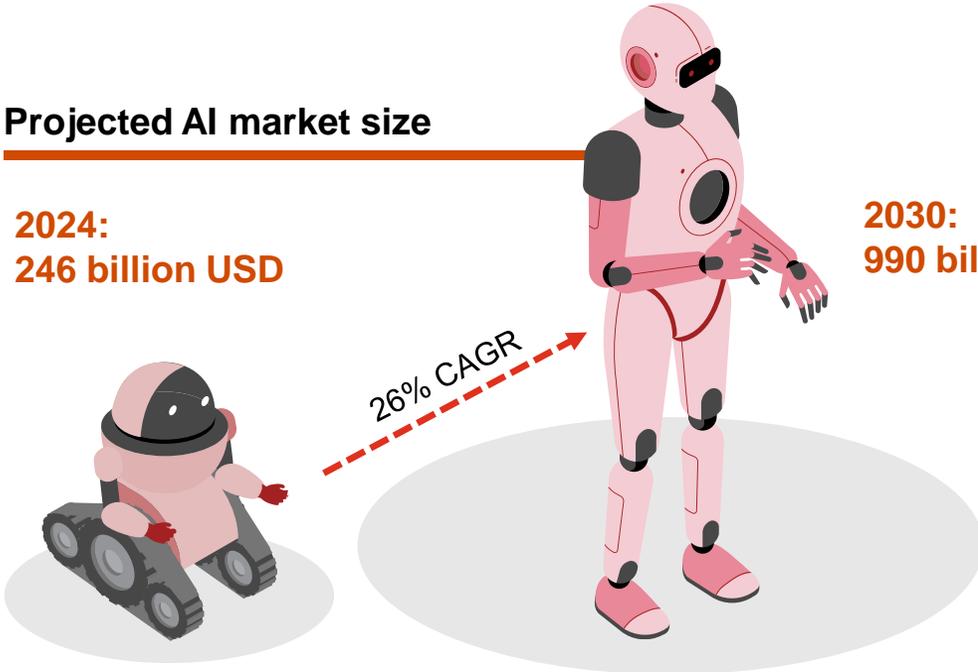


Projected AI market size

2024:
246 billion USD

2030:
990 billion USD

26% CAGR



- **Global AI and GenAI spending** will increase by factor 4 until 2030
- **Leading industries** in terms of AI spending in 2024:
 - **Software/Information Services** (33 bn. USD)
 - **Banking** (31 bn. USD)
 - **Retail** (25 bn. USD)
- (Gen)AI effects an **additional GDP** of up to **1 trillion USD** in 2030

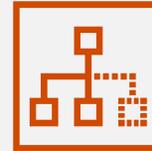
Source: Strategy& analysis (2025)

Impact on societies, organizations and people



Governments

60% AI-enabled national election campaigns



Organizations

AI bots advise on >40% of board decisions



Employees

65% of knowledge workers use AI copilots



Consumers

>60% of digital user journeys personalized

The recent break-throughs around Generative AI puts Data & AI back on the CEO agenda

Our hypotheses for (Gen)AI

1

GenAI continues to democratize AI access with diverse outputs

Easy access to GenAI applications is crucial for emerging use cases, driving mid-term adoption and efficiency gains, such as built-in AI

2

GenAI starts to turbocharge process automation through Agentic AI

The ability of systems to autonomously execute complex process tasks will boost process automatization and increase productivity

3

Connected data ecosystems will unlock AI's full potential

ChatGPT, Gemini, DeepSeek & co were just the start – integrating AI with company data unlocks many more use cases

4

Reliable AI output requires well governed data

To ensure AI delivers qualitative and compliant results, the underlying data needs a solid framework of data governance

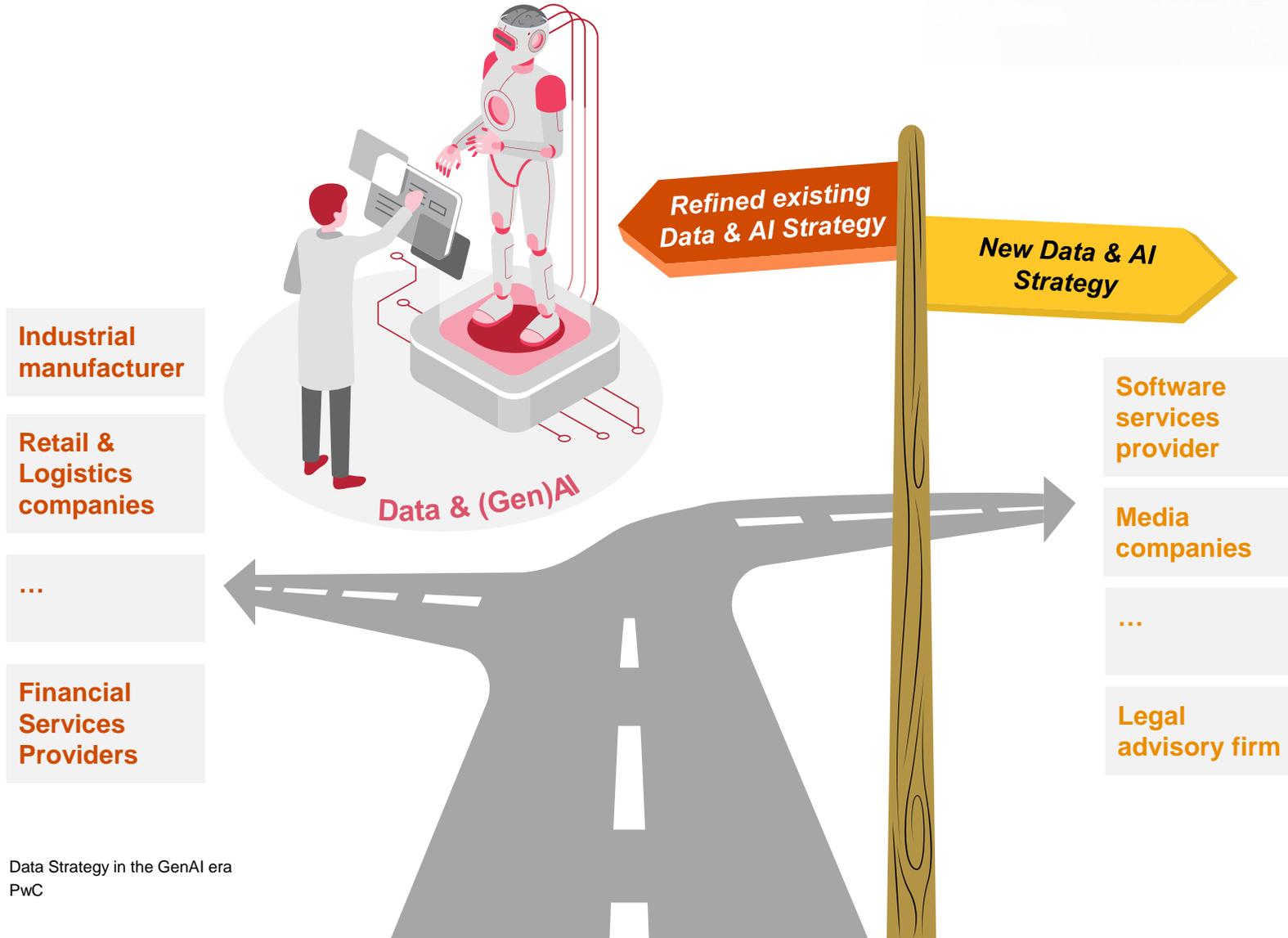
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Successful players combine GenAI with traditional AI and Analytics

Use cases don't stop at standalone AI applications – many traditional data analytics initiatives benefit from enhancement with new AI solutions



GenAI should be an integral part of your Data & AI strategy

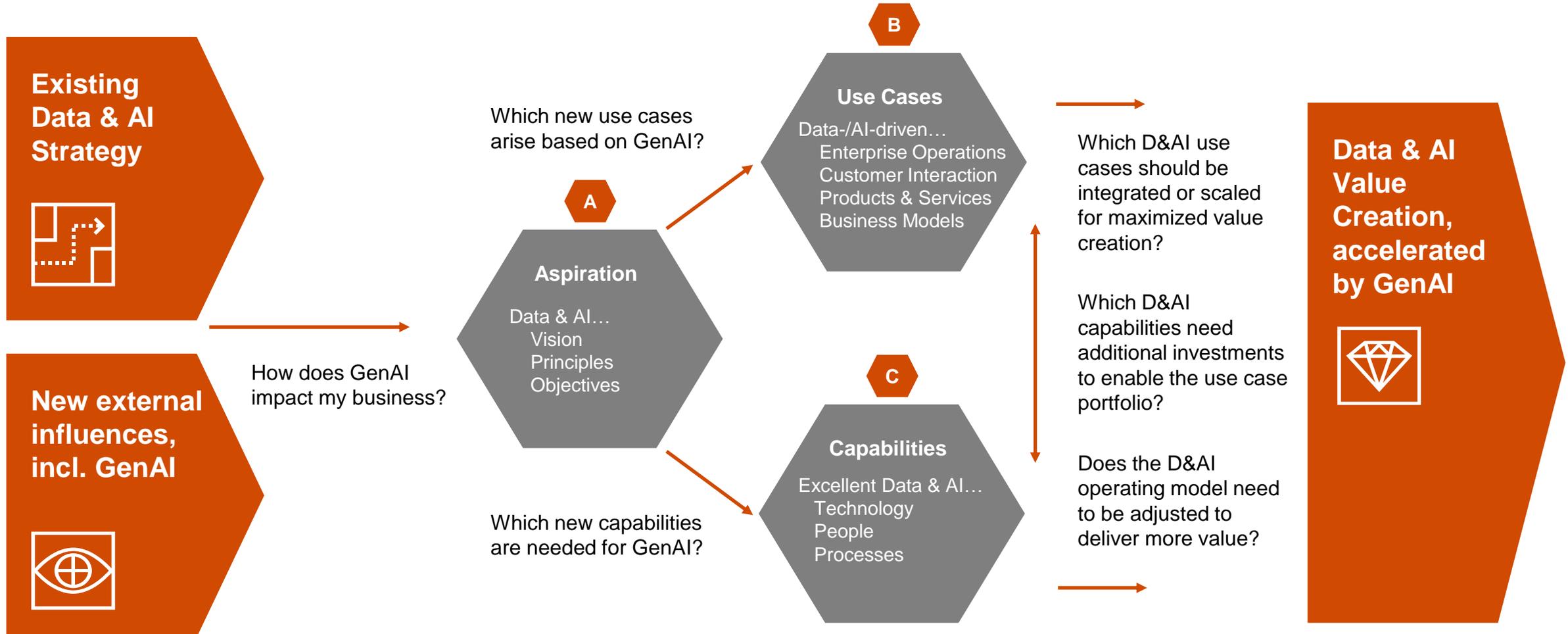
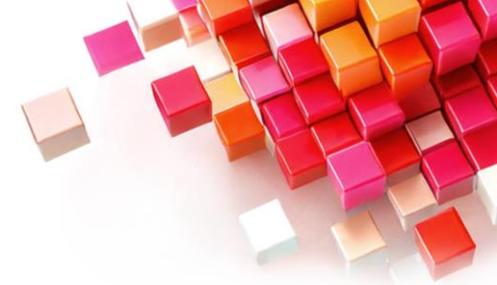


Considerations for path forward

(indicative)

- How is my industry impacted by GenAI?
- Which new business models have emerged?
- How does my competition react?
- How have customer expectations changed?
- How do my employees need to adapt?
- Is my strategic roadmap still future-proof in the era of GenAI?

In your Data & AI Strategy, carefully adjust for the new realities created by GenAI



A refined aspiration for Data & AI in times of GenAI, is strongly influenced by the degree of industry disruption

Impact of (Gen)AI on Business Transformation



Bare Minimum Adoption

Focus on:

- No qualitative changes of strategy
- Identification of “low hanging fruits”
- Limited investments into capabilities and use cases



GenAI as Enabler

Focus on:

- GenAI as strategic addition for Data & AI
- Enablement of employees through targeted upskilling
- Extension and uplift of current Data & AI portfolio



Business Model Reinvention

Focus on:

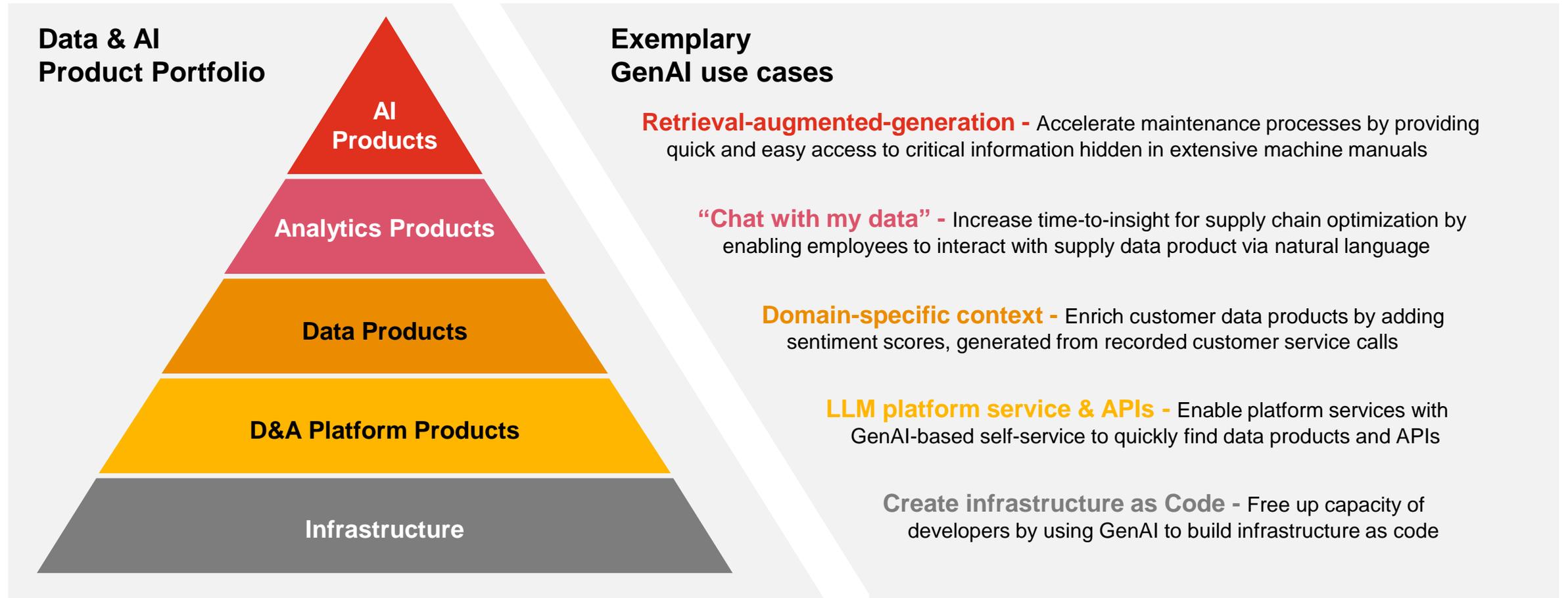
- Validation of business model and possible reinvention
- Redesign of customer interaction
- Product innovation
- Data monetization

Further factors that influence the aspiration for Data & AI:

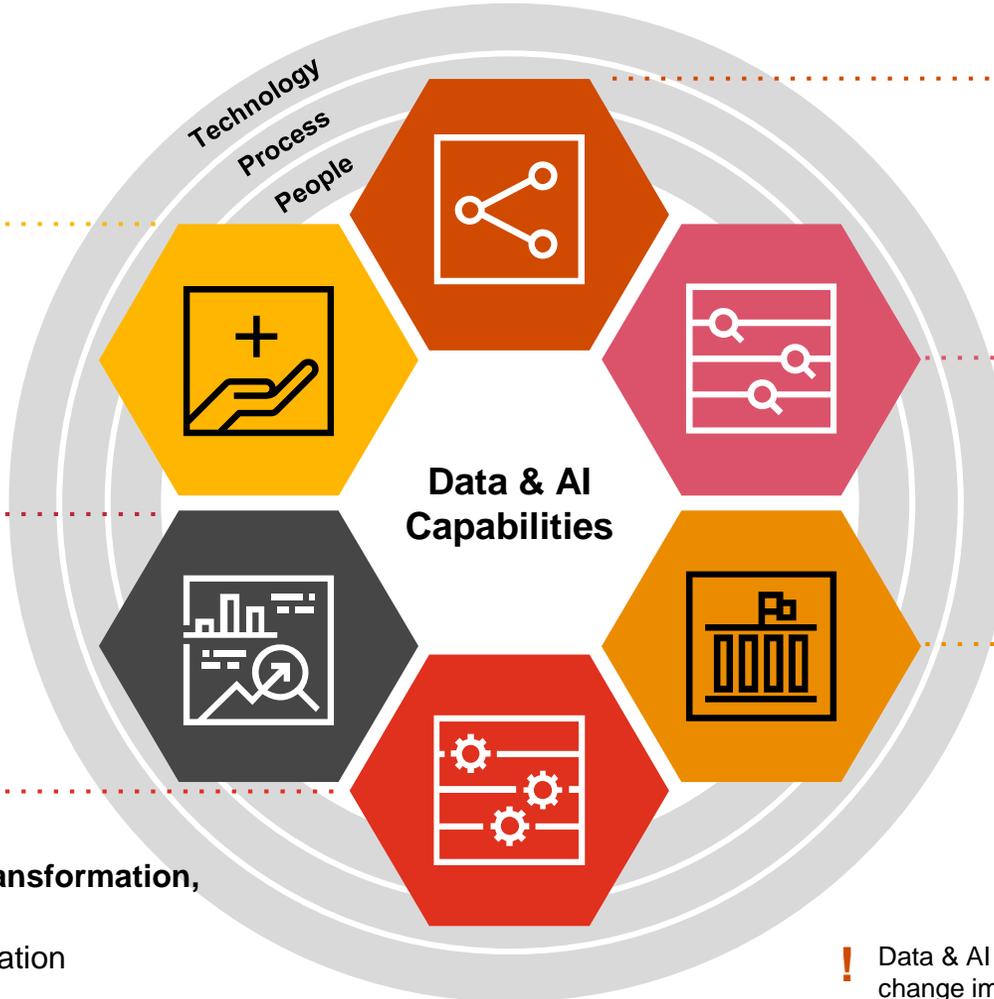
- Current maturity of capabilities, e.g. Data & AI Literacy
- Existing Data & AI use cases
- Competitive positioning (e.g. pricing leadership vs product differentiation)
- Significance of Data & AI in business strategy
- Corporate culture
- Regulatory framework
- Sensitivity of processed data

The strategic impact may also evolve over time, e.g. due to increasing technical capabilities and a growing range of applications

GenAI doesn't just expand use cases for business teams, but also for Data teams



GenAI builds on Data & AI fundamentals, but also requires companies to extend their existing capabilities



Business Enablement

- Data & AI Portfolio Management
- Data & AI Product Marketplace
- **Data & AI Literacy & Trainings !**
- **Data & AI Communities & Ecosystem !**

Data Analytics & AI

- Visual Analytics, Dashboards & Reporting
- Statistics, Simulation & Optimization
- **Machine Learning and Generative AI !**
- **Process Automation & Agentic AI !**

Data Processing

- **Data Collection, Integration, Migration, Transformation, Storage, Provisioning and Archiving !**
- Data Warehousing, Data Lake, Data Virtualization

Data Architecture

- Enterprise Data Modeling
- Data Definitions & Taxonomies
- Master Data Management
- Data Integration Patterns

Data Quality

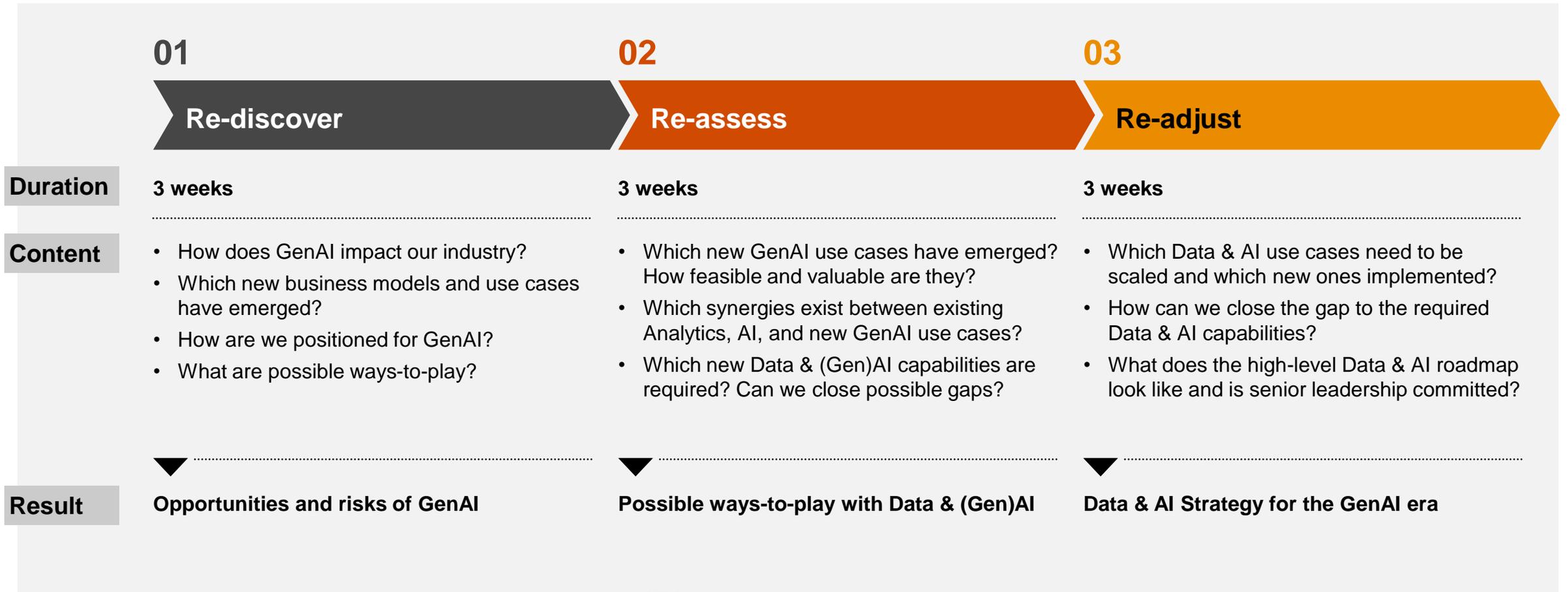
- **Data Quality Control !**
- Data Issue Management
- **Data Error Correction !**
- Data Quality Reporting

Data & AI Governance

- Data Ownership & Stewardship
- Privacy, Security & Compliance
- **Ethics & Responsible AI !**
- Data Catalog & Access Management

! Data & AI capabilities with high change impact through increased GenAI use

In our experience, refining a Data & AI strategy for GenAI takes 3 steps and can be done within weeks



4 key takeaways to start revisiting your Data & AI strategy in the era of GenAI



Fully integrated

GenAI is to be considered and integrated in the overarching D&AI strategy and delivery



Business-led

GenAI integration should be business-driven based on end user demand and problems



Scaled impact

Besides standalone GenAI use cases, GenAI extensions to existing use cases should complement the portfolio



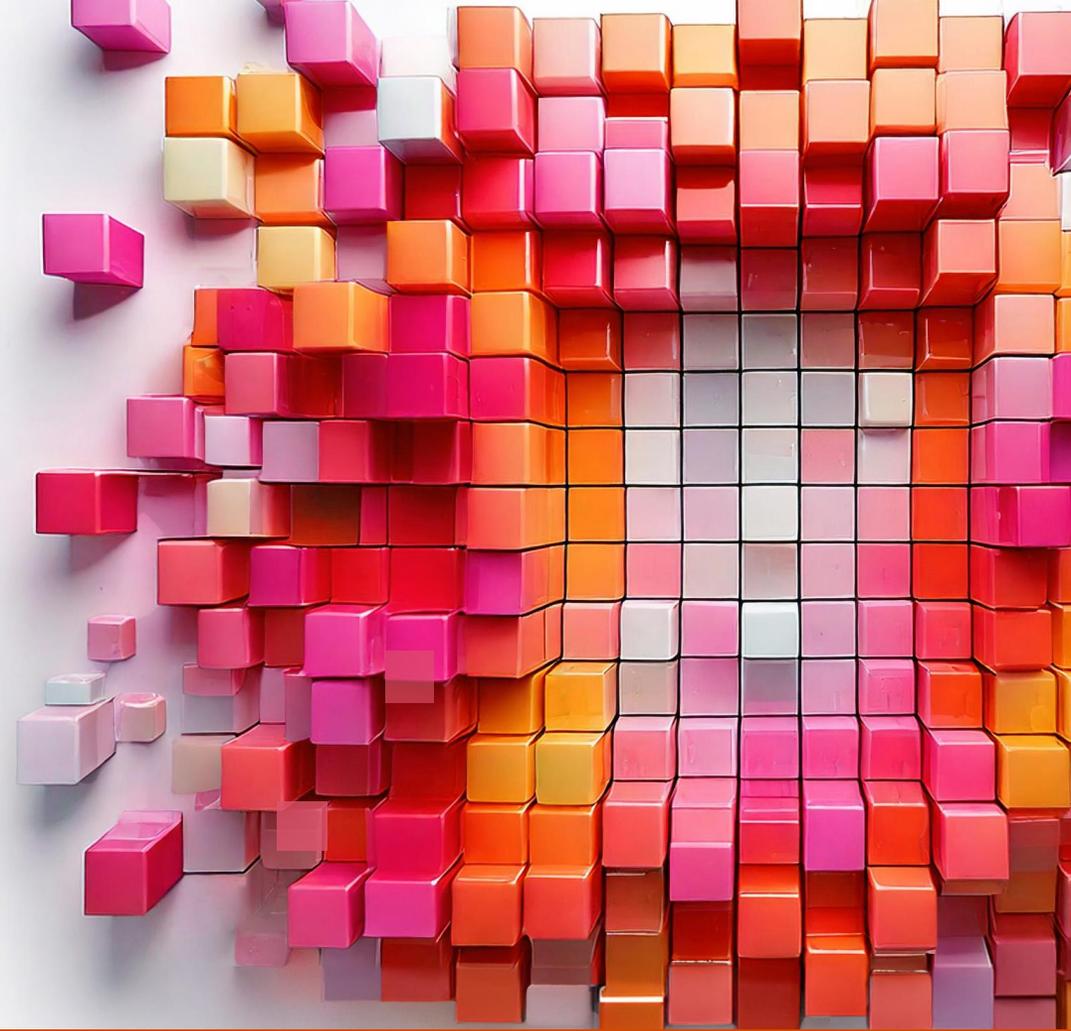
Strong foundation

Investing in data products and quality remains a strategic priority to enable AI use case value delivery



Thank you

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