

Enterprises Are Sitting on \$18 Trillion in Trapped AI Value. New Research Shows How to Unlock It

Four enterprise debts are quietly working against every dollar organizations are investing in AI

NEW YORK, June 15, 2026 /PRNewswire/ -- Genpact (NYSE: G) and HFS Research today published "[The \\$18 Trillion Opportunity: How Four Enterprise Debts Will Make or Break Your AI Future](#)," a global study of over 2,000 enterprise executives spanning 16 industries and 14 functions. The research identifies nearly \$18 trillion in recoverable enterprise value sitting inside Global 2000 companies and pinpoints the four interconnected enterprise debts preventing organizations from unlocking it.

Resolving enterprise debts can unlock approximately 8% faster annual revenue growth and 16% annual cost reduction. Yet 85% of leaders surveyed say that these enterprise debts are actively limiting their AI value — and over half have no funded plan to address them. With nearly 13% of average function spend now flowing into AI, the gap between ambition and foundation has never been more costly.

"Resolving these debts is the largest underutilized performance opportunity in business today. You cannot out-innovate broken foundations. Understanding exactly where these debts live and how to resolve them requires context-rich process intelligence," said **Balkrishan "BK" Kalra, President and CEO, Genpact**. "This is why our core conviction is that there is 'No Artificial Intelligence without Process Intelligence.' The companies that commit to this work will not gain a few points of advantage. They will gain market share by a factor."

Four debts. One opportunity.

The research defines enterprise debt as the accumulated drag on a business from outdated technology, poor data quality, inefficient processes, and underprepared talent. Left unresolved together, the four debts compound — each one deepening the others — into a structural ceiling on performance. In the AI era, that ceiling becomes a hard constraint.

- **Data debt** is the gap between the data enterprises have and the data AI needs. Only 33% of enterprise data is AI-ready today, and 42% of AI and analytics initiatives are already failing because of data quality issues.
- **Process debt** is the cost of how work actually flows — manual, ungoverned, and hard to change. Around 40% of employee time each week is lost to inefficient or manual processes. AI deployed into ungoverned workflows does not fail visibly; it executes the wrong steps faster.
- **Technology debt** is the legacy infrastructure tax every modern initiative pays before it starts. Core enterprise systems are, on average, 10 years old, and approximately 42% of developer time goes to servicing existing debt rather than building new capabilities.
- **Talent debt** is the readiness gap between the workforce enterprises have and the human-agent operating model AI requires. Only 32% of the workforce is AI-ready — and talent debt amplifies every other form of debt, silently slowing every resolution effort.

The \$18 trillion opportunity

HFS and Genpact calculated the aggregate value at stake by applying respondent-reported revenue uplift and cost reduction estimates across the combined revenue base of the Global 2000. Process and data debt each represent nearly \$7.7 trillion of the total opportunity. Manufacturing and healthcare hold the largest combined unlock; financial services carries the highest concentration of data debt.

"AI is exposing every weakness enterprises have spent decades learning to live with. Poor process discipline, fragmented data, legacy technology and talent gaps are no longer operational nuisances. They are now direct barriers to growth, productivity and competitiveness. The \$18 trillion opportunity belongs to the organizations willing to confront these debts head on instead of masking them with more technology spend," **said Phil Fersht, Founder and CEO, HFS Research.**

Only 6% are pulling ahead

Despite the scale of the opportunity, more than 50% of enterprises have no funded debt resolution initiative in motion. Only 6% of respondents — identified in the research as proven debt resolvers — have established, run, and measured results from resolution programs at scale. The diagnostic gap between this group and the rest is small. The execution gap is enormous. The full report details what the 6% do differently and charts the path for the enterprises that are ready to follow.

For more information and to download the full report, visit <https://www.genpact.com/insight/how-four-enterprise-debts-will-make-or-break-your-ai-future>.

About Genpact

Genpact (NYSE: G) is an agentic and advanced technology solutions company. We leverage process intelligence and artificial intelligence to deliver measurable outcomes. With a strong partner ecosystem and decades of client trust, we provide innovative solutions that transform how businesses run. Powered by a team with an active learning mindset and client centrality at its core, we deliver lasting value for the world's leading enterprises.

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