

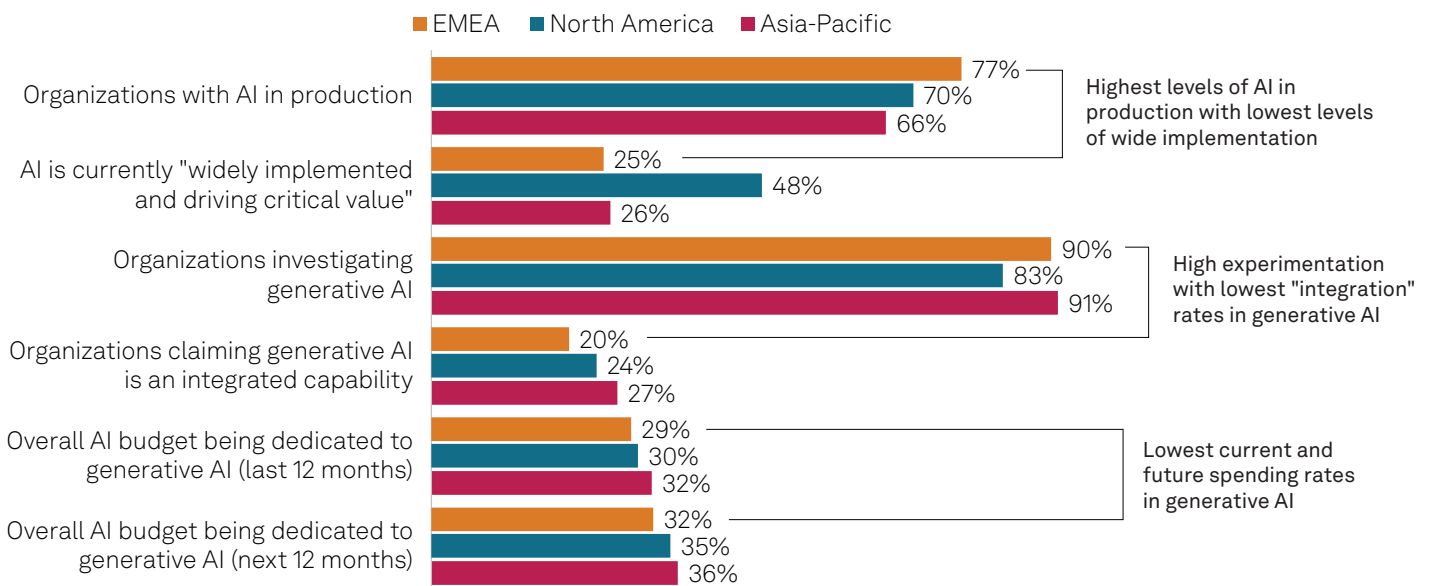
EMEA Leading in AI Maturity, but Taking a Cautious Approach to Generative AI

The Take

Generative AI is making waves globally, enhancing the strategic value of and investment in AI technologies. As generative AI continues to grow, however, we are beginning to see regional disparities in attitudes toward AI, as well as various hurdles to its adoption. The Europe, Middle East and Africa (EMEA) region stands out for its robust up-front investment in AI broadly, with a comparatively high proportion of organizations — about 8 in 10 — reporting AI projects in production. This surpasses top-line investment rates in AI from Asia-Pacific (66%) and edges it ahead of the US (70%), suggesting high regional buy-in to the promise and potential of these next-generation technologies.

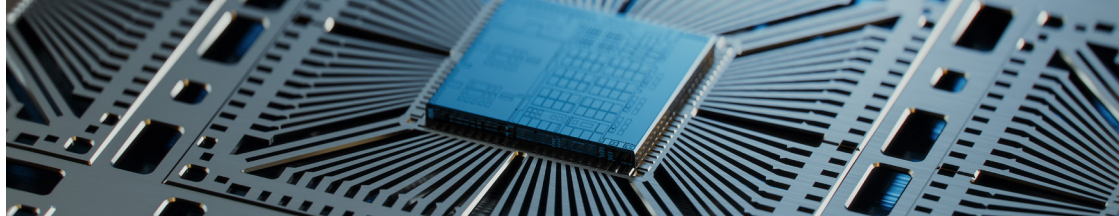
The EMEA region struggles with scaling AI and advanced AI model development and integration. While 48% of North American respondents say AI is widely implemented and driving critical value, only 25% of EMEA respondents report the same. This pattern is also evident in EMEA's approach to generative AI. Despite not being dramatically behind, EMEA organizations are investing a smaller percentage of their overall AI budget (29%) in generative AI than those in North America (30%) and Asia-Pacific (32%), and they report the lowest rates of generative AI as an integrated capability (20%), compared to 24% in North America and 27% in Asia-Pacific, which suggests they are taking more of a wait-and-see approach to this nascent technology.

EMEA leads in AI enthusiasm and maturity, but lags in spending



Source: S&P Global Market Intelligence 451 Research and Weka custom AI Trends study, 2024.

Cultural factors are one of the primary obstacles hindering the adoption of AI/machine learning (ML) projects in EMEA today. A prevailing sense of caution is evident, fueled by elevated concerns over customer resistance (23%) and potential reputational harm (21%) associated with AI implementations. This risk-averse mentality translates into a more conservative approach to AI initiatives across the board. EMEA-based organizations show more measured approach to spending, scaling and distributing data and AI workloads compared with counterparts in other regions.



Respondents also cite several technology bottlenecks, namely legacy infrastructure's inability to accommodate AI/ML (32%) and data storage and management challenges (40%) as inhibitors to scaling projects. Data storage issues also appear to be funneling into data quality challenges, which plague AI projects equally in EMEA and other regions of the world. The results highlight a need for investments in infrastructure modernization both at a regional and company level to be able to manage the significant computational demands and data processing requirements posed by AI and generative AI. Rigorous data management practices and tooling are also essential for ensuring the data quality, security and accessibility critical for successful AI initiatives.

Business impact

EMEA is proactively tackling cultural and regulatory challenges, positioning itself for long-term success. EMEA-based respondents were the least likely to cite compliance and regulatory requirements as a major impediment to moving AI projects into production given well-established regulatory frameworks and practices.

Pragmatism with generative AI may be yielding higher ROI. Despite slightly lower levels of spending, EMEA respondents report the highest degree of impact of generative AI across various value drivers compared with other regions. This suggests that a practical, targeted approach is more effective than that of Asia-Pacific respondents, which report the highest investment levels but a lower average level of benefits.

Strong data infrastructure provides a foundation for AI success. Data quality is a top inhibitor of AI projects across the world, 10 percentage points over the next-most-cited challenge. A data strategy that ensures the access, sourcing and standardization of quality data will grow more important as organizations increase their reliance on AI for critical business decisions and operations.

Security and reliability are paramount in infrastructure decisions. Nearly half of all EMEA respondents cite security as their top infrastructure concern, even if it means sacrificing some cost-efficiency, which suggests a healthy long-term focus on building robust, risk-minimized infrastructure.

Looking ahead

EMEA is moving quickly to embrace AI, fueled by a high rate of enthusiasm and experimentation across its many forms. While generative AI investment and deployment maturity may lag North America and Asia-Pacific, practicality in EMEA is driving potentially higher returns on investment through more targeted applications that place security and risk mitigation at the forefront. While slower, a more pragmatic and measured approach to AI could lead to more responsible and beneficial development of AI in the long term.

This is not a static picture. EMEA organizations' strong levels of exploration and their growing comfort with AI suggest that the region might eventually bridge the gap in investment and deployment maturity. This will, however, require proactively addressing the cultural and infrastructure impediments that organizations face today.

Effective communications addressing public concerns about data privacy and potential job displacement will help encourage public buy-in and foster a culture of responsible development. Likewise, cultivating a robust ecosystem of technology vendors with expertise in advanced technologies such as AI/ML will be vital. Investing in infrastructure modernization projects at a regional and company level that solve crucial data management, storage and access challenges will further enable AI adoption to flourish. By focusing on these critical areas, EMEA can solidify its position as a global leader in AI, defined by technological advancement and a commitment to responsible development that balances innovation and sustainable growth.



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