ETHORITY
AI BUSINESS OPERATING SYSTEM

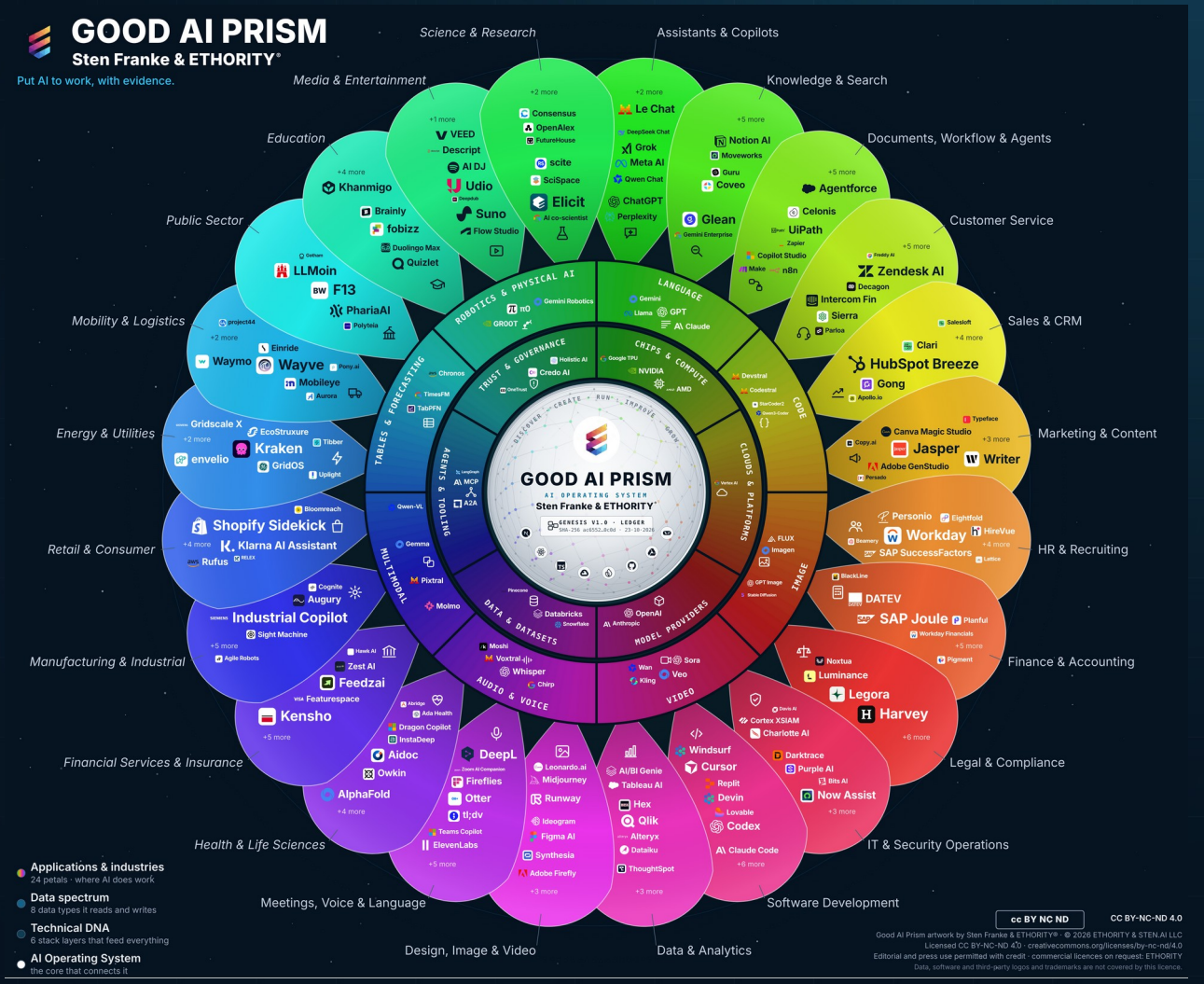
The Good AI PRISM
by STEN & ETHORITY

KEYNOTE · GOOD AI PRISM MARKET STUDY 2026/27

Put AI to work.

What organisations need from AI now, and the decisions that will shape 2027.

Sten Franke · Founder, Principal Architect & Lead Creator



THE QUESTION

AI adoption is advancing unevenly

One global survey of 1,719 organisations, three separate answers:

≈90%

of surveyed organisations report regular AI use in at least one function

44%

report scaling AI across the enterprise

37%

attribute any EBIT effect to AI

The question has moved from whether to use AI to which AI, how safely, and whether it pays.

Sources: McKinsey, The state of AI, Aug 2026 (1,719 respondents, 97 countries; self-reported, separate answers, not a funnel).

ABOUT THE STUDY

Wave 1 of a longitudinal research programme

Two parts: provider documentation, observed repeatedly in waves (research edition of 20 October 2026), and a synthesis of external market and buyer studies from 2025 and 2026.

30+ economies

Official statistics, associations, academic and consulting surveys, each cited where it is used. Survey figures are never pooled.

998 market entries

Including 961 AI offerings, each recorded with a dated source from the provider's own pages.

194 depth records

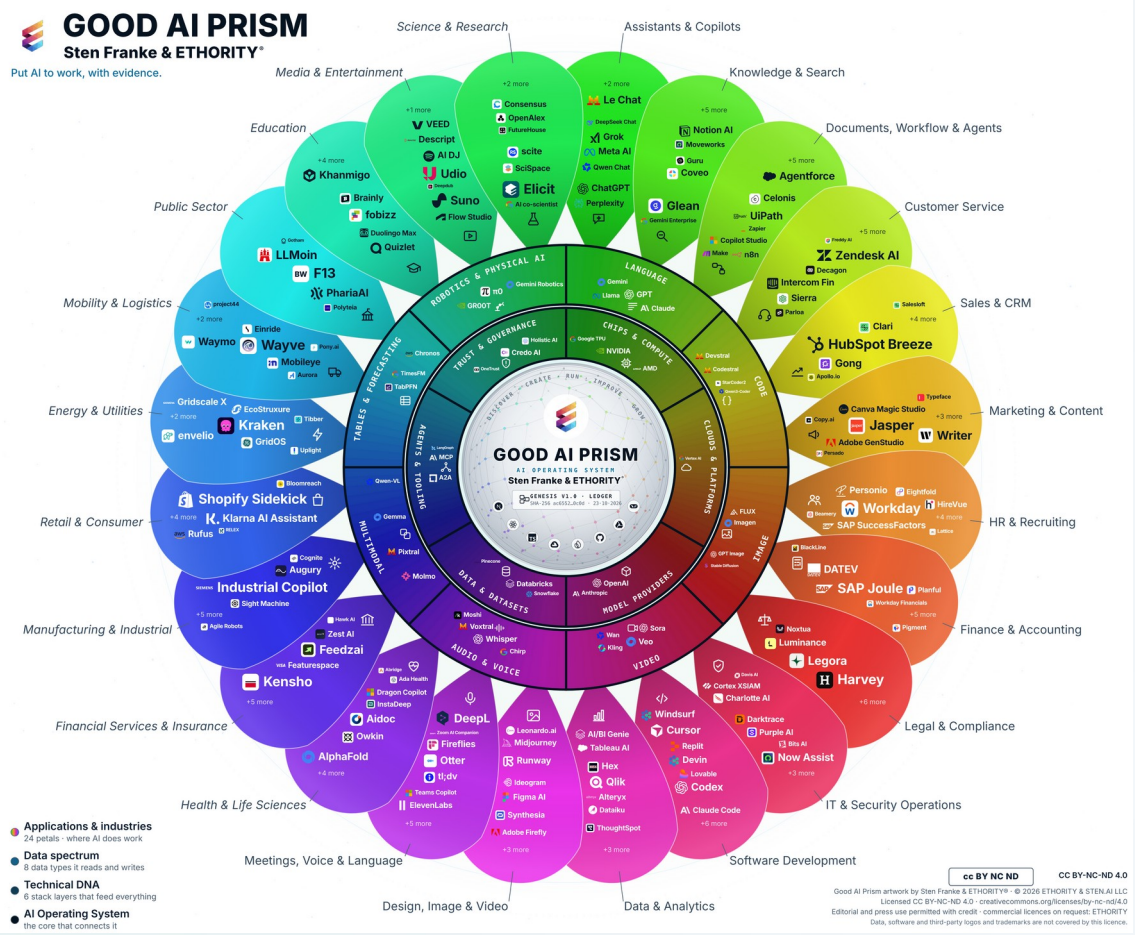
Customer Service and Manufacturing researched for pricing unit, price, hosting, training use, integrations and limits.

775 sourced values

216 relations checked against first-party pages; 103 values re-checked in a separate research pass.

Wave 1 documents the state of the provider information ETHORITY reviewed on 19–20 October 2026. Changes are recorded in subsequent waves.

Three rings. One AI market



The Good AI Prism maps the AI market from the outside in: where AI does the work, what it works with and what it is built on.

Outer petals · 24 business areas
Where AI does the work: 14 functions such as Customer Service or Finance, and 10 industries such as Manufacturing or Public Sector.

Middle ring · 8 data types
What the AI works with: language, code, image, video, audio, multimodal, tables, robotics.

Inner ring · 6 technology layers
What it is built on: chips, clouds, models, data, agents and tooling, trust and governance.

1,037 placements for 998 entries; an entry can appear in more than one area. Names on the wheel are an illustrative selection.

HOW TO READ THE PRISM

A map of what exists, with its evidence attached

Listed

An entry shows that an option exists and where it does the work.

Sourced

Each entry carries its provider source and the date it was read.

Researched

Depth shows how far decision facts have been established.

Evaluated

Evaluation for a specific use is a separate, documented step.

Unknown facts stay open research questions until a source is found.

WHY A MAP, AGAIN

From the Social Media Prisma to the Good AI Prism

Then: social media, 2010–2019

The Social Media Prisma mapped a fragmented social web for German brands, adapted from the Conversation Prism by Brian Solis and JESS3.

The lesson

Signals are abundant; useful decisions are scarce. A map of the ecosystem helps more than a list of platforms.

Now: AI, 2026

The Good AI Prism maps the AI market in three rings and keeps the evidence attached to every entry.

Independent references to the Social Media Prisma include Cool Infographics (2010) and a Springer chapter (2021).

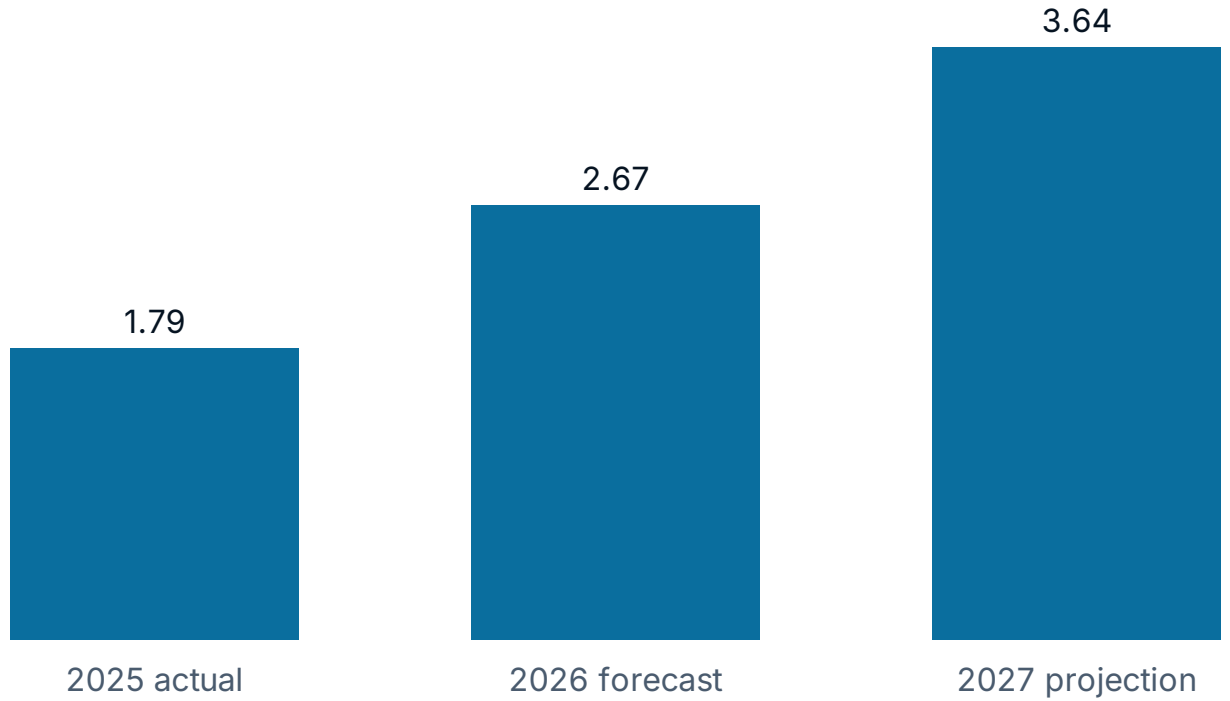
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Big spend, broad use, rare scale

Spending grows by half; results trail behind.

AI spending grows by half in one year

Worldwide AI spending, US$ trillion (broad definition including infrastructure).



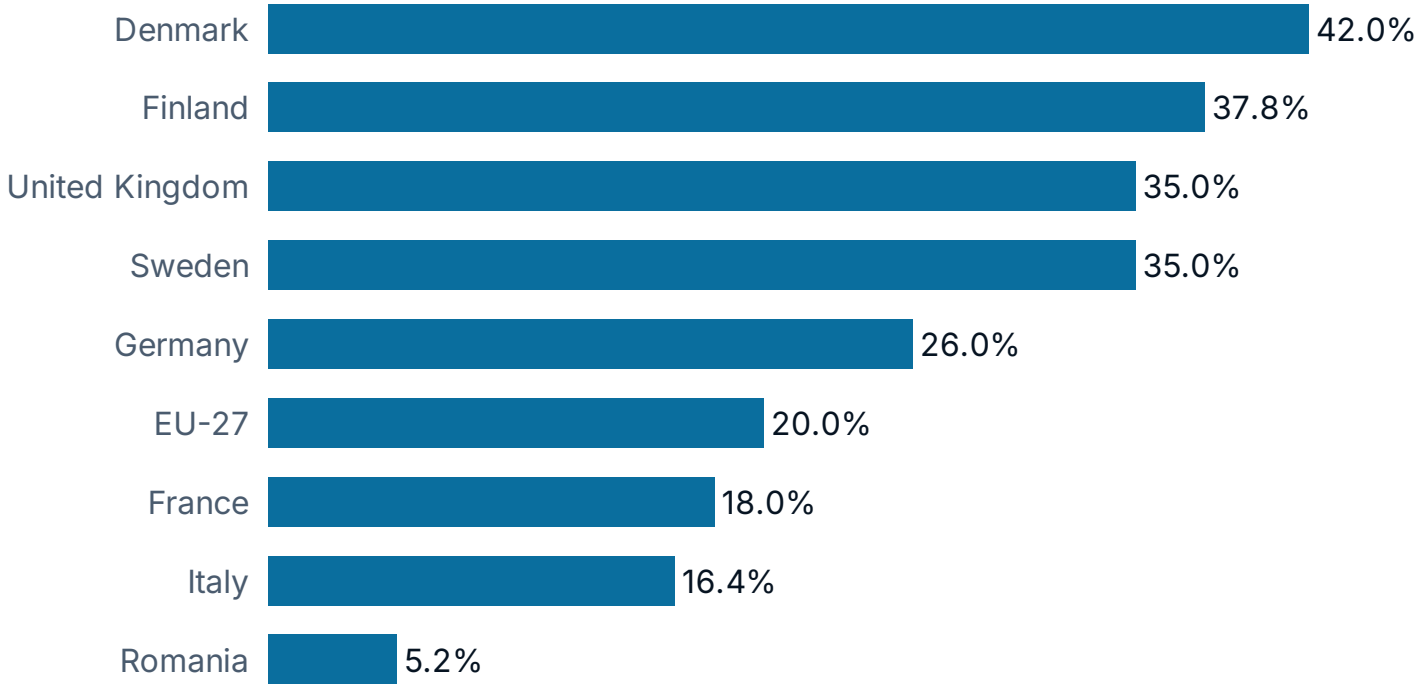
+49.5% in 2026

More than half goes into infrastructure: US$1.48 tn of the US$2.67 tn. Asia/Pacific spending is forecast to grow 4.6-fold by 2030.

Source: Gartner, Sep 2026; IDC, Sep 2026 (Asia/Pacific). 2027 is a projection.

Official statistics tell a soberer story

Firms with 10+ employees using AI, 2025 (Eurostat and national statistics).



One firm in five

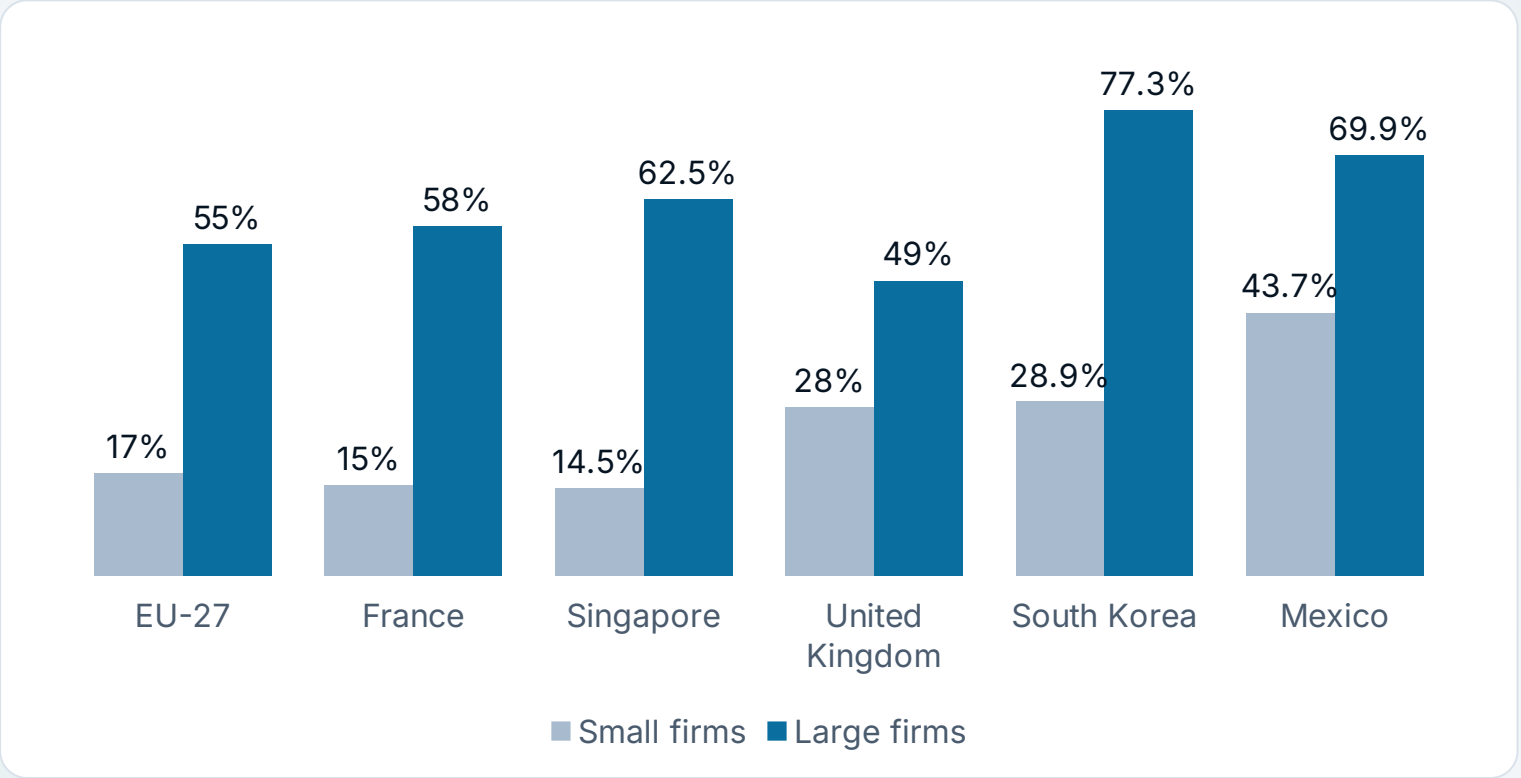
In the EU, one firm in five with ten or more staff uses AI. National ranges run from about 5% to 42%.

Sources: Eurostat (Dec 2025) and national statistics offices; UK = firms with 10+ employees, June 2026 (ONS). Definitions differ by country.

2 · ADOPTION BY FIRM SIZE

Large firms adopt more often, in every study we compared

Share of firms using AI, small versus large (size bands differ by country).



1.6 to 4.3 times

The size gap is the most consistent pattern in the data. Small firms need proportionate entry points and supplier programmes run by large customers.

Sources: Eurostat, INSEE, IMDA, ONS, KCCI via JoongAng Daily, Banxico via Ecosistema Startup; 2024–2026 releases.

Know-how first, then law and cost

Asked why they do not use AI, or use it less, firms answer in a similar order across regions.

Know-how

71% of EU firms that considered AI name lack of expertise; 85% of German non-users; 81% of Korean manufacturers have no AI specialists.

Legal uncertainty

53% of EU firms that considered AI name unclear legal consequences; 56% of German users report legal uncertainty.

Cost

63% of German non-users find costs hard to calculate; in Brazilian industry, cost is named first.

Sources: Eurostat 2025; Bitkom, Sep 2026; KCCI 2025; IBGE via Poder360.

2

Rules diverge. The dates are concrete

Regulation is a set of dated deadlines that differ by jurisdiction.

The deadlines leaders should plan for

Application dates, not adoption dates. Confirm the operative law for the intended use.

1

IN FORCE

Korea, Vietnam

AI laws apply; labelling of AI-generated content is the rule most regimes share.

2

2 DEC 2026

EU marking

Machine-readable marking for generative AI already on the market.

3

1 JAN 2027

Colorado, California

Duties for covered automated decisions: notice, explanation, review.

4

13 MAY 2027

India

Main data-protection duties under the DPDP Rules.

5

2 DEC 2027

EU high-risk

Duties for high-risk uses listed in Annex III; Annex I products from 2 Aug 2028.

Sources: Regulation (EU) 2026/1744 (EUR-Lex); Colorado SB 26-189; CPPA; India DPDP Rules 2025; ITA; Baker McKenzie. Not legal advice.

Six regions, six different starting points

Europe

From 5% (Romania) to 42% (Denmark) of firms; expertise and legal clarity first.

Germany

57% of firms with 20+ staff use AI; 98% of large firms have a strategy, 37% clear governance.

United States

Leads on spend; 48% of small-business users struggle to choose the right tool.

Latin America

About US$10 bn in 2026; Brazil US$4.2 bn, Mexico US$2.4 bn.

Middle East and Africa

Highest private use in the UAE; firm-level data still thin.

Asia-Pacific

Spending forecast to grow 4.6-fold by 2030; a sharp size gap.

Sources: Eurostat; Bitkom, Sep 2026; KPMG, Jun 2026; Goldman Sachs 10KSB; IDC 2024–2026; Microsoft, Sep 2026.

Germany crossed the majority line

German firms with 20+ employees using AI: 20% (2024), 36% (2025), 57% (2026).

57%

of firms with 20+ employees use AI in 2026

85%

of non-users lack technical know-how

21%

name licences as a cost driver; cloud 51%, data preparation 50%

Adoption is broad but shallow: text generation far outweighs automation and decision support in the Mittelstand.

Sources: Bitkom, Sep 2026 (n=603); KfW Fokus 554.

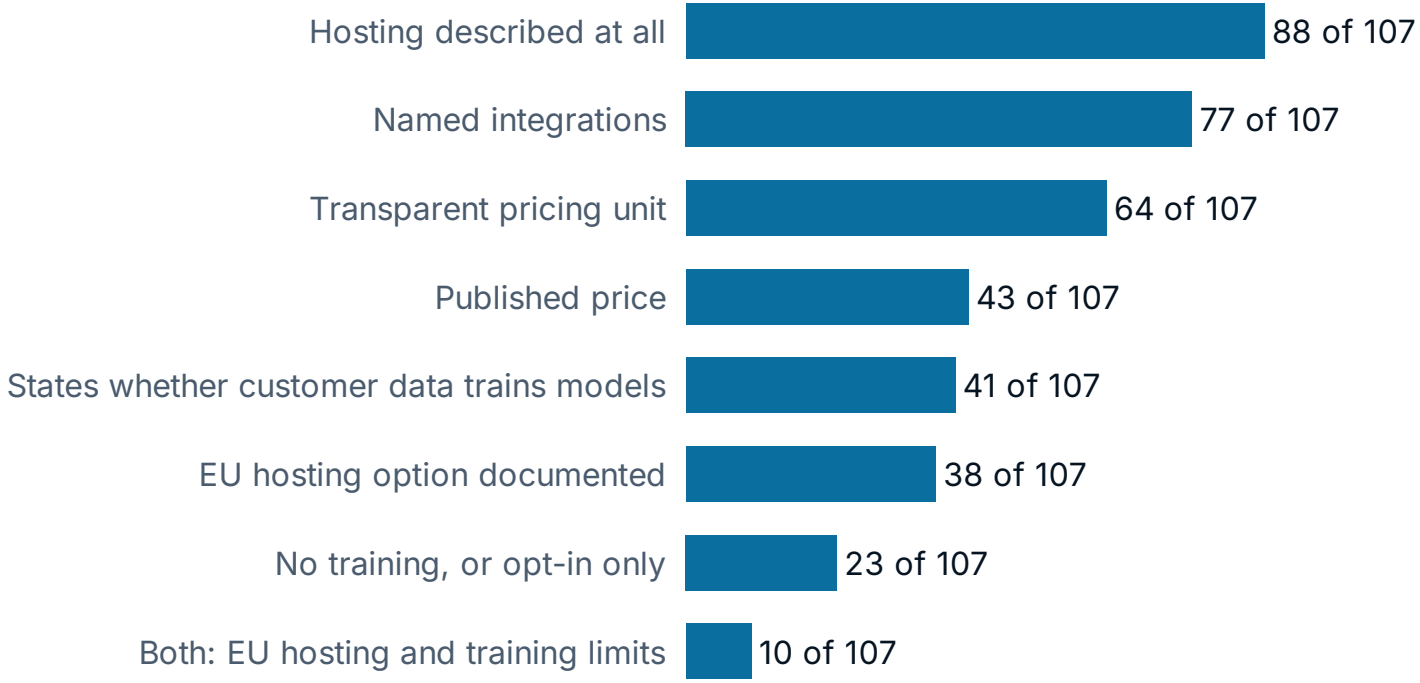
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Buyers can rarely compare offerings on facts

What providers publish, and what they leave open.

10 of 107 offerings document both key data facts

Customer-service AI offerings whose own public pages document each fact; Wave 1; provider information reviewed by ETHORITY, 19–20 Oct 2026.



8 no training, 2 opt-in only

Missing documentation does not mean a capability is missing. Ask suppliers to confirm plan, region and terms in writing before any demo.

Source: Good AI Prism research edition, 20 Oct 2026. Quote with both criteria; providers can submit corrections at ethority.ai/ai-prism-study.

The same pattern across the market

Marketing before documentation

564 of 701 new placements rest on provider marketing pages; 137 on technical documentation.

Prices are hard to compare

Customer-service AI is billed in at least seven units: per resolution, per seat, per conversation, per minute, credits, tiers or on request.

Dependencies stay hidden

Verified relations show many applications resting on a few hubs, so one model or platform change can affect many products.

Identities change fast

34 renamings and 26 ownership changes within weeks of research.

Source: Good AI Prism research edition, 20 Oct 2026.

4

AI decisions in an uncertain world

A credible AI strategy must remain useful when conditions change.

AI rests on chips, power, capital and law

Hyperscalers are investing more than US$700 billion in 2026; the pace is set by grids, connection queues and permits.

485 TWh

data-centre electricity use in 2025, all data centres

950 TWh

projected for 2030, about 3% of global demand

56%

of CEOs report no significant financial benefit from AI so far

Sources: IEA, Key Questions on Energy and AI, 2026; PwC 29th Global CEO Survey, Jan 2026 (4,454 CEOs).

Choose reversible ways through

DECISION	MOVING TOO FAST	MOVING TOO SLOWLY	A REVERSIBLE WAY THROUGH
Invest now or stage it	Paying for capability that is soon cheaper or obsolete	Falling behind competitors who redesign the work	Staged commitments with a review date
Buy, build or combine	Lock-in to one supplier's roadmap	Owning maintenance the business cannot staff	Hybrid with clear exit and export terms
Keep control of data	Data used or stored beyond what is agreed	Blocking the uses that create value	Documented hosting, training and access terms
Rely on which providers	Concentration: price, capacity or access changes	Integration cost of too many suppliers	A tested fallback for each critical use
Redesign whose work	Resistance, skill gaps and unowned errors	Gains that stay as unused saved time	Participatory change plan with owners
Evidence before scale	Scaling an unproven result	Endless pilots that never decide	Stop/go criteria agreed in advance

Workforce lens (Severin L. Wilson): plan adoption, training, participation and oversight as part of every staged commitment.

CONCLUSIONS

What the evidence adds up to

1 Connect adoption with outcomes

Track use, accepted outcomes, quality and full cost together.

2 Build capability around a useful first task

One worthwhile process, a baseline, time and support to learn.

3 Adapt the route to the organisation

Proportionate entry points for small firms; clear ownership in large ones.

4 Use published evidence to improve the shortlist

Treat missing documentation as an open question; get terms in writing.

5 Make governance part of progress today

An AI inventory with named owners, checked against the operative law.

6 Invest in learning and resilience

Staged pilots, tested fallbacks, scale when the evidence supports it.

Three phases, two gates

Establish the baseline, run a supported pilot, learn from the result and scale where the outcome justifies it.

1

NOW · BEFORE THE PILOT

Choose and measure

One process that matters, an accountable owner, today's volume, cost and quality.

GATE 1

Baseline agreed

No pilot without a measured starting point and a named owner.

2

NEXT 90 DAYS

Compare and pilot

Three credible options, deciding facts in writing, one pilot under a written charter.

GATE 2

Threshold met

No scale-up without the agreed result on accepted outcomes.

3

2027

Scale and steer

Cost per accepted outcome over time; one owner per system; yearly estate review.

PRACTICAL APPENDIX

Measure the cost of an accepted outcome

One measure makes AI options comparable across billing units and providers.

Cost per accepted outcome

$$\frac{\text{usage or licence + amortised integration + monitoring, change and training + human review + handling of failed cases}}{\text{attempted cases} \times \text{acceptance rate}}$$

Worked example (illustrative)

10,000 cases a month; usage €6,000, integration €1,500, monitoring and training €500, human review €2,000, rework €1,000. The tool resolves 40%: €11,000 ÷ (10,000 × 0.40) = €2.75 per accepted outcome, compared with today's cost per resolved case on the same monthly boundary.

Decide on facts, start small, govern early

Founders and small firms

- Pick one recurring task, not a platform
- Compare three tools on cost per unit at your volume
- Keep what meets its objective

Mittelstand and mid-sized firms

- Readiness assessment and staff AI literacy
- One process live, cost per accepted outcome
- Map every AI use to the rules

Large enterprises

- One AI inventory, including shadow AI
- Owner and KPIs per use case, stop/go gates
- Control usage-based costs; sovereignty criteria

Boards: ask for outcomes, not usage. Providers: publish pricing units, hosting regions and data-use terms.

WHAT ETHORITY BUILDS

Connected work, from market orientation to the next decision

Discover → Create → Run → Improve → Grow: research, software, engineering, implementation and operations.

Discover

Good AI Prism · Buyer Intelligence

Sourced market map; dated comparisons and shortlists.

AVAILABLE

Create

Decision Record · Opportunity Case

Options, owner, economics and stop criteria; signed result.

AVAILABLE

Run

AI Estate · governed agents

Demonstrates system ownership, permissions and fallback.

DEMONSTRATION

Improve

Workspace · evidence record

Planned versus observed results; corrections kept.

PREVIEW

Grow

Trust Infrastructure

Trust Profiles, Passport, Handshake (simulation).

ROADMAP

October 2026: services by agreement; Workspace demonstration; trust-network roadmap. The illustrated evidence record describes an intended event history.

THE STUDY

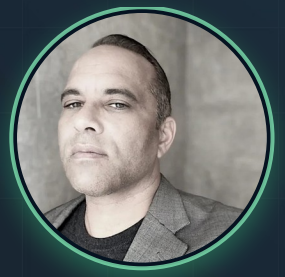
Read the study. Take the Prism home.

Download the Good AI Prism Market Study 2026/27 in English and German, with the large-format Prism.

Download the study



Sten Franke
Founder, Principal Architect & Lead Creator
Creator and architect of ETHORITY's AI systems, connecting business strategy, market intelligence and engineering.



Severin L. Wilson
Chief Business & Transformation Officer
Connecting enterprise relationships, organisational transformation and responsible AI adoption.

ethority.ai/ai-prism-study · sten@ethority.ai

Put AI to work, with evidence.

Artwork, sources and reuse

Edition v2.8 · 23 October 2026. Updated v3.11 artwork; evidence cut-offs and substantive content are retained. The artwork shows the 17 October reference selection, not the extent of the study research inventory or live website catalogue.

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