



Accenture Hong Kong AI Index 2026

The enterprise AI advantage

Turning AI ambition into scaled value in Hong Kong



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Building a sustainable, AI-powered growth engine in Hong Kong

Hong Kong's economy is on the move. The city reclaimed the top global initial public offering (IPO) spot in 2025 and posted its strongest half-year growth in nearly five years.^{1,2} Yet beneath that momentum, two structural pressures remain unresolved: a shrinking workforce and slowing productivity growth.^{3,4} Together, these pressures demand a new and sustainable source of growth that endures beyond near-term boosts from capital markets and trade.

Increasingly, companies are looking to artificial intelligence (AI) as the solution. Our survey of 150 executives in Hong Kong reveals that generative AI (gen AI) is expected to boost productivity by 15% in the next 18 months while slashing costs by 11% (see the Research snapshot below). So far, however, just 12% of organizations' strategic gen AI bets have reached scale, suggesting a considerable execution gap.

Notably, a small number of organizations we call **Vanguards** have scaled 22% of their strategic gen AI investments.⁵ They are twice as likely as their peers to report returns exceeding expectations, and they are also better at identifying high-value opportunities.

Their advantage, our study findings indicate, comes from following four mutually reinforcing imperatives: **leading with value** rather than technology; **reinventing work** around outcomes rather than existing workflows; **rewiring the digital core** to support AI, especially agentic AI, at scale; and **embedding responsible AI (RAI)** so trust grows alongside adoption.

This report explores how more companies can put these moves into practice and strengthen Hong Kong's capacity to innovate, creating a competitive edge that lasts.

Research snapshot

The Accenture Hong Kong AI Index assesses the capabilities associated with scaling AI across the enterprise. Between March and April 2026, an Accenture research team surveyed 150 C-suite and senior leaders across nine industries in Hong Kong, spanning organizations with a revenue of less than \$500 million to more than \$50 billion. Building on the framework from **Accenture's Front-Runners research**,⁶ the survey assessed 10 AI capabilities associated with scaling AI.

The research team used participant responses to construct the Accenture Hong Kong AI Index and to classify respondents into three capability clusters: Starters, Pursuers and Vanguard.

Hong Kong's five-year plan puts AI at the center of its economic agenda

Hong Kong's First Five-Year Plan for Economic and Social Development (2026–2030) gives AI a prominent and specific role in the city's future.⁷ It identifies AI as a catalyst for “new industries, new forms of business and new models,” designating it both as a core industry and a new technology to empower different economic sectors.

The plan also draws on Hong Kong's distinctive position. It calls on the city to act as both a “super connector” and “super value-adder,” with stronger cross-boundary integration and “synergized development with the Mainland.”

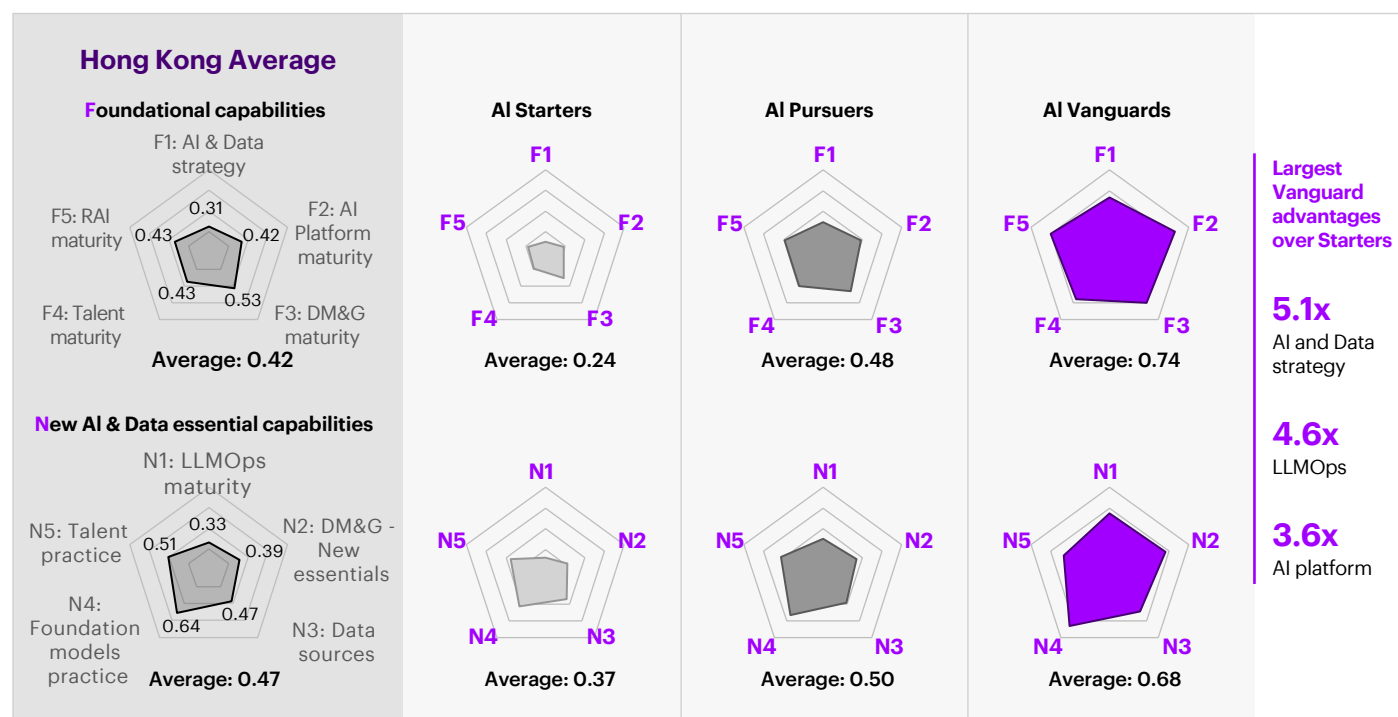
The delivery mechanism is the AI+ Initiative, which frames the program around two tracks: building industries that place AI at their core (industries for AI) and deploying AI to strengthen existing ones (AI for industries). Improved data resources, computing infrastructure and data governance form the foundation of the initiative.

The 2026 Policy Address, which is the annual work plan for implementing the five-year plan, translates this into specific near-term goals: promoting AI applications across industries and public services, widening adoption among small and medium enterprises, expanding AI training and workplace upskilling and strengthening AI risk governance with dedicated guidance for AI agents.⁸

From AI ambition to enterprise readiness: How Vanguard move ahead

Vanguards' strengths stem from their cohesive approach to building capabilities. It's not just that they are ahead of others in AI adoption. It's about how they are integrating AI consistently and simultaneously into strategy, operations and value creation as they progress. Figure 1 illustrates the capability advantages Vanguards have built. They have scaled 22% of their strategic bets and are twice as likely as their peers to report that their data and AI investments have exceeded expected returns.⁹

Figure 1: How—and why—Vanguards are pulling ahead



Note: Each capability is scored on a 0–1 scale.

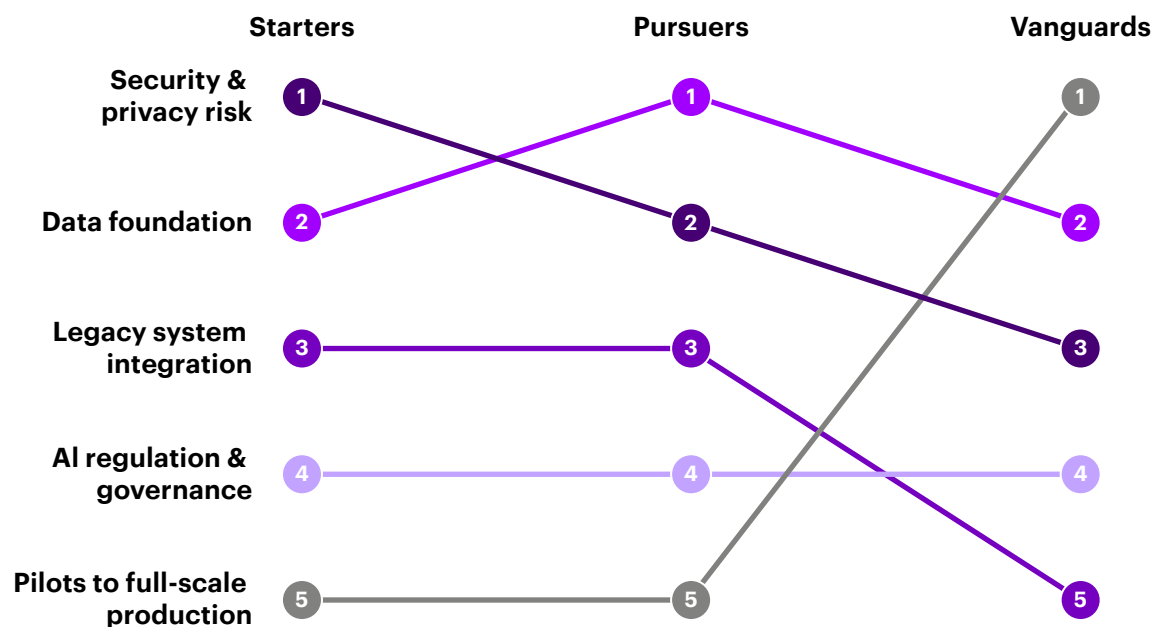
Source: Accenture Hong Kong AI Index Survey 2026



Other organizations have yet to make this shift as thoroughly. Those we call **Starters** are still building the foundations and experimenting with AI in pockets of their business, seeking to prove value. Meanwhile, **Pursuers** have developed stronger capabilities and moved further into deployment, although AI is not yet consistently embedded across the enterprise. Their challenge is to industrialize successful applications, integrate them across the business and sustain performance over time.

Immediate priorities evolve, as Figure 2 shows. But the sooner Starters and Pursuers take a whole-enterprise view of capability-building, and make it a continuing discipline, the faster they may be able to progress. Strengthening one capability without the others creates new problems. Better platforms without clearer strategy increase activity without improving returns. More specialists without redesigned work confine AI expertise to small teams. Scaling applications without effective large language model operations (LLMOps) and RAI creates operational and trust risks.

Figure 2: Companies shift priorities as they move through different stages of AI industrialization and new challenges arise



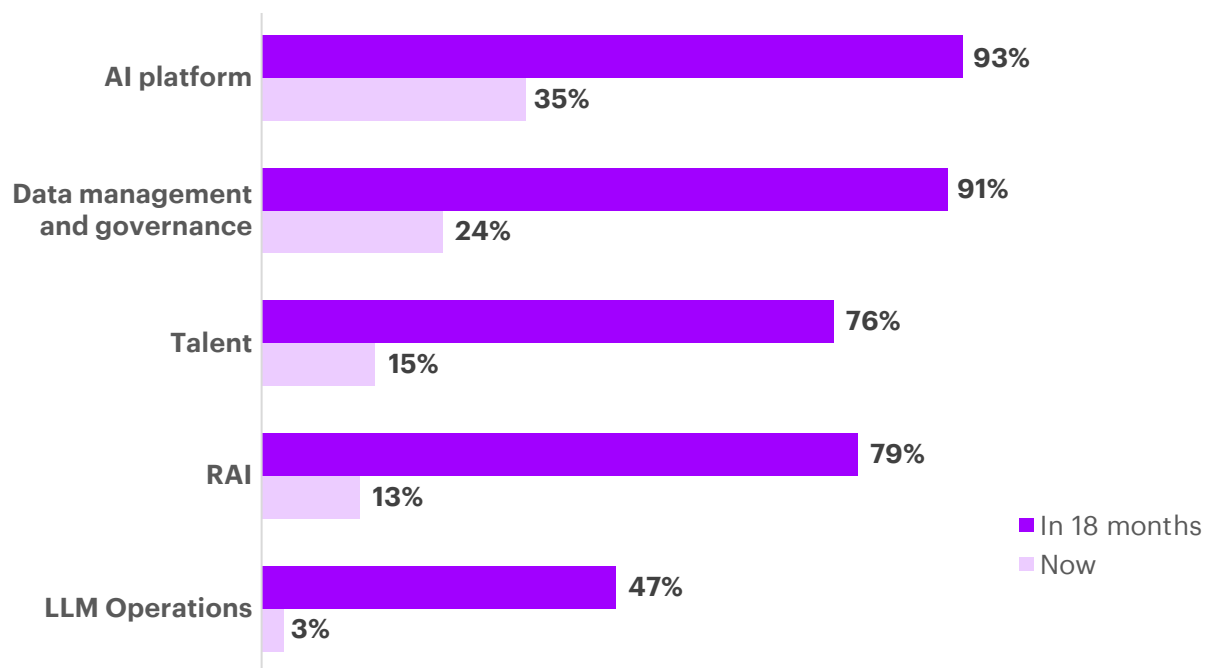
Note: Rankings show relative priority within each cluster, not the absolute severity of each challenge.

Source: Accenture Hong Kong AI Index Survey 2026

Expectations for progress are high. Today, just 3% place themselves at the upper levels of LLMOps capability, 13% in RAI and 15% in talent.¹⁰ Within 18 months, firms expect those proportions to rise to 47%, 79% and 76%, respectively. For AI platforms, the expected leap is from 35% to 93% (see Figure 3).

Figure 3: The ambition-to-execution gap

Share of respondents assessing their firm at **upper capability*** levels today and expecting to reach them within 18 months (%)



****Upper**" reflects the top 2 response options respondents selected for each dimension (e.g., "Leading" and "Maturing" for AI Platform, "Strong RAI maturity" and "Scaling RAI maturity" for RAI). This is a categorical self-assessment and is not derived from the composite Accenture Hong Kong AI Index score reported elsewhere in this study.

Source: Accenture Hong Kong AI Index Survey 2026

Moreover, business leaders' expectations reveal confidence in future performance. Over the next 18 months, the region's business leaders expect scaled gen AI to deliver a 15% increase in productivity, a 14% uplift in revenue, a 14% improvement in customer experience and an 11% reduction in costs.¹¹

And Hong Kong has all the ingredients it needs for AI-led growth. The city has strong institutions, deep capital markets and privileged access to both China's AI ecosystem and global innovation networks.

Four imperatives

So how can organizations translate ambition into execution? Four imperatives frame a comprehensive approach, positioning companies to make real and sustainable progress.

Imperative 1: Lead with value so AI investment follows business ambition

AI creates enterprise value when it delivers measurable outcomes across growth, productivity, customer and employee experience, talent and sustainability, and when those outcomes scale beyond isolated use cases and endure over time. Most Hong Kong firms are not yet there. Only 3% have fully integrated AI and data into core business strategy. Just 34% report consistent AI value across multiple functions or widespread sustained value across the enterprise.¹² The bottom line? Most companies are failing to connect AI use cases to what the business is actually trying to achieve.

And as AI scales, the constraints are increasingly becoming organizational. Forty-five percent of firms expect stagnant operating models to become a barrier to AI-enabled productivity, up from 17% over the past year. Resistance to organizational change and an inability to anticipate challenges and opportunities follow close behind.¹³

The economics are compounding the pressure. Companies are deploying AI workloads without making them economically observable, routing tasks to models more powerful than the work requires and accumulating token costs without linking them to measurable outcomes.¹⁴

That is why leaders must reframe business priorities through an AI lens, concentrate investment around strategic outcomes and redesign how decisions are made, experiments are funded and pilots earn the right to scale. The governance question is simple: which AI initiatives are creating value, which need further refinement and which should be discontinued.



Cathay Pacific illustrates this point. Its AI ambitions rest on more than a decade of investment in digital and data capabilities. That foundation allows the airline to take a differentiated approach to innovation. Rather than applying the same governance model to every initiative, Cathay separates experimentation from scale. Emerging ideas can be tested quickly to determine whether they create value and, if so, where that value is most likely to emerge. Proven use cases then move into a more rigorous phase focused on outcomes, integration and accountability. The approach balances exploration with execution, helping the organization test new ideas quickly while concentrating investment on those that deliver measurable results.

**Not every AI initiative should carry the same rulebook.
But the moment an idea earns the right to scale, it is
measured like any other investment.**

— Lawrence Fong, Director Digital and IT, Cathay

Meanwhile, Standard Chartered Hong Kong sees technology as a means to strengthen customer experiences and human connections. Rather than focusing on automation alone, the bank prioritizes how AI can empower people to deliver more relevant advice, more seamless service and more successful client relationships. This is already taking shape across customer-facing channels: In contact centers, AI supports smoother, higher-quality service, while in wealth advisory it enables more personalized interactions while preserving human judgment at critical moments.

By embedding AI into the fabric of banking, the bank combines technology at scale with human judgment and trust, creating differentiated experiences that drive both customer value and sustainable growth.

Our ambition for AI extends beyond operational automation. We measure success by its ability to strengthen client relationships, improve service quality and create differentiated customer experiences.

— Esther Mai, Managing Director, Head of Digital Banking, Client Experience and Analytics, Standard Chartered Bank (Hong Kong) Limited

Imperative 2: Reinvent work so people and AI create value together

Work is changing more slowly than the technology being introduced into it. Only 19% of Hong Kong firms see process and system reinvention as critical to scaling AI, while just 26% plan to redesign roles and responsibilities.¹⁵ Adding AI to existing roles produces narrow gains, while redesigning work around AI produces enterprise-wide ones.

The talent picture sharpens the problem. Although 78% are confident in their ability to attract top talent, only 15% have the emerging specialist AI skills needed to support value creation today.¹⁶ The issue is that the roles required to close this gap do not yet exist in most organizations. AI is creating new functions: talent professionals who scan and scout future skill requirements before they become urgent, human resources business partners who manage both people and agents, and operations leads who can orchestrate work across human and automated workflows.

That is why redesigning work comes before aligning skills. Executives should allocate tasks across human judgment, copilots, agents and automation, then reassemble them into roles and teams with clear accountability and oversight. Workforce intelligence can identify where skills are emerging or becoming obsolete, while role-specific learning embedded in daily work enables people and AI to improve together.

Hong Kong Disneyland offers an example of the magic that happens when AI is used to enhance what humans do best. It embeds AI into everyday workflows rather than treating it as a standalone program. Instead of mandating a single enterprise tool, it allows teams to adopt solutions that best fit their business needs and level of maturity, while redesigning work around the complementary strengths of humans and AI. In World of Frozen, guests can have an enchanting encounter with Olaf, magically brought to life as a self-walking, free-roaming robotic character. It reflects how technology can help bring beloved stories and characters to life in new ways. Using a branch of AI known as reinforcement learning, Disney Imagineering Research & Development, animators and robotics experts collaborated closely to recreate the character's signature movements, which often appear in non-physical ways in animation.

This innovation shows how AI can reshape creative workflows. Human teams define the character, creative intent and guest experience, while AI-enabled simulation and robotics help translate that intent into physical movement. Rather than replacing human creativity, the technology extends what creative and technical teams can bring to life together. The result is an opportunity for guests to share joyful and heartwarming moments with Olaf, in ways they have never experienced before.

AI can help us imagine, create and innovate in new ways, but at Disney, human creativity and human-to-human connections will always remain at the heart of everything we do.

— Leon Chan, Vice President, Technology, Digital and Data, Hong Kong Disneyland Resort



Imperative 3: Rewire the digital core to scale agentic AI

Enterprise-wide integration of AI remains nascent. Only 1% of the surveyed Hong Kong firms have integrated agentic AI across functions. Forty-one percent cite inflexible legacy infrastructure as the primary barrier. Agentic AI makes this barrier harder to clear. It requires trusted access to business context, orchestration across systems and models, and clear controls that standard deployments do not demand. Meanwhile, the technology environment is becoming more complex: 57% already run large language models (LLMs) from at least two provider groups spanning the Mainland, Hong Kong and global providers.¹⁷

A digital core capable of scaling agentic AI needs to do three things. Connect AI capabilities across functions. Build a semantic layer—underpinned by domain ontologies—that gives people and AI a common understanding of the business and makes the right information available in the right context. Orchestrate different models based on performance, cost, capability and compliance, while modernizing legacy systems that constrain flexibility and scale.

Two organizational experiences stand out. Prudential Hong Kong Limited's experience highlights why the semantic layer is important. An early AI assistant for insurance agents combined decades of product information, pricing content and customers' frequently asked questions into a single knowledge base, but achieved accuracy of only around 50%. The company subsequently reorganized the information into eight business domains and introduced a routing layer to direct each query to the most relevant context, in effect building a semantic layer that gave AI an understanding of the business. Accuracy soon rose from around 50% to 98%. The experience showed that enterprise knowledge cannot simply be aggregated for AI consumption. To operate effectively at scale, AI systems require information organized around business context, intent and decision-making boundaries.



We're thinking about a new model in which the entire policy administration system is essentially a network of AI agents—one for each policy, coordinated by a concierge agent for the customer.

— Alex Wong, Regional CITO for Greater China and CITO for Hong Kong and Macau, Prudential Hong Kong Limited

Meanwhile, Standard Chartered's experience highlights a complementary requirement: how AI applications are architected. The bank is taking a model-agnostic approach to AI, separating applications from underlying models. This gives it the flexibility to deploy solutions consistently across markets while adapting to evolving technologies, ecosystems and regulatory expectations. In a fast-moving AI landscape, adaptability is becoming a strategic advantage.

Imperative 4: Embed RAI so trust grows alongside scale

Embedding RAI means moving beyond principles and ensuring that trust becomes part of how AI is designed, supplied, governed and used across the AI value chain. Model providers must build safety in from the start through evaluation, alignment testing and safeguards. On the other side, enterprises must govern how those models are selected, contextualized with business data, deployed and monitored. As systems move from generating recommendations to autonomously acting on them, enterprise accountability requires stronger guardrails, clearer escalation pathways and continuous monitoring mechanisms as part of the operating infrastructure.

Today, very few firms are ready for that shift. Only 13% report being at the upper levels of RAI capability today, while 79% expect to reach those levels within 18 months. Moreover, RAI receives only 13% of the average data and AI budget, second-last among investment categories.¹⁸ That underinvestment shows up in capability. Just 34% of firms have well-established capabilities to identify and manage AI risks and their unintended consequences.¹⁹

The consequence is visible inside organizations. Ninety percent of leaders report mature accountability practices. Eighty-five percent say the same about transparency. Yet only 40% of employees feel they have a voice in how AI gets introduced.²⁰ Companies are building RAI for regulators. They have not yet built it for the people doing the work.

Building RAI into the operating machinery starts with model selection. Enterprises should assess providers' evaluation practices, safeguards, transparency and incident-response arrangements before deployment, and maintain oversight as models evolve. Risk assessment, testing, explainability and continuous monitoring must permeate the entire AI lifecycle. As systems become more agent-driven, clear decision rights should identify who approves an application and who remains accountable for its outcomes. Technical architecture should accommodate regulatory changes so AI systems can adapt without extensive re-engineering.

For instance, Accenture and Anthropic have announced a partnership to build a team of embedded evaluators to assess model safety alongside Anthropic's teams. The partnership reflects a practical principle: safety requires technical expertise and deep understanding of AI's usage in the real world.²¹

At an enterprise level, Konica Minolta shows how RAI can move from principles into day-to-day governance.²² The Japanese technology company had established AI principles centered on safety, fairness and transparency, but gaps in evaluation criteria and employee capabilities limited its ability to apply them consistently at scale. To address this, it strengthened its AI governance framework through a structured review process, a rapid risk-assessment playbook and a decision flowchart for evaluating AI use cases. It also introduced role-based training to build employees' ability to identify and manage AI-related risks. The effort is expected to reduce review times by 50% while embedding RAI into day-to-day operations.

For Hong Kong companies operating across the Mainland and global markets, strong RAI governance can expand the freedom to scale. It makes it easier to earn employee and customer trust, navigate different requirements and take successful applications into more parts of the business and more markets.



Building AI advantage from within

The organizations pulling ahead have stopped treating AI as a set of initiatives and started treating it as an operating discipline, embedding it into how they create value, organize work, build technology foundations and manage risk. Over time, those capabilities will compound, making it easier to scale successful initiatives and sustain the value they create.

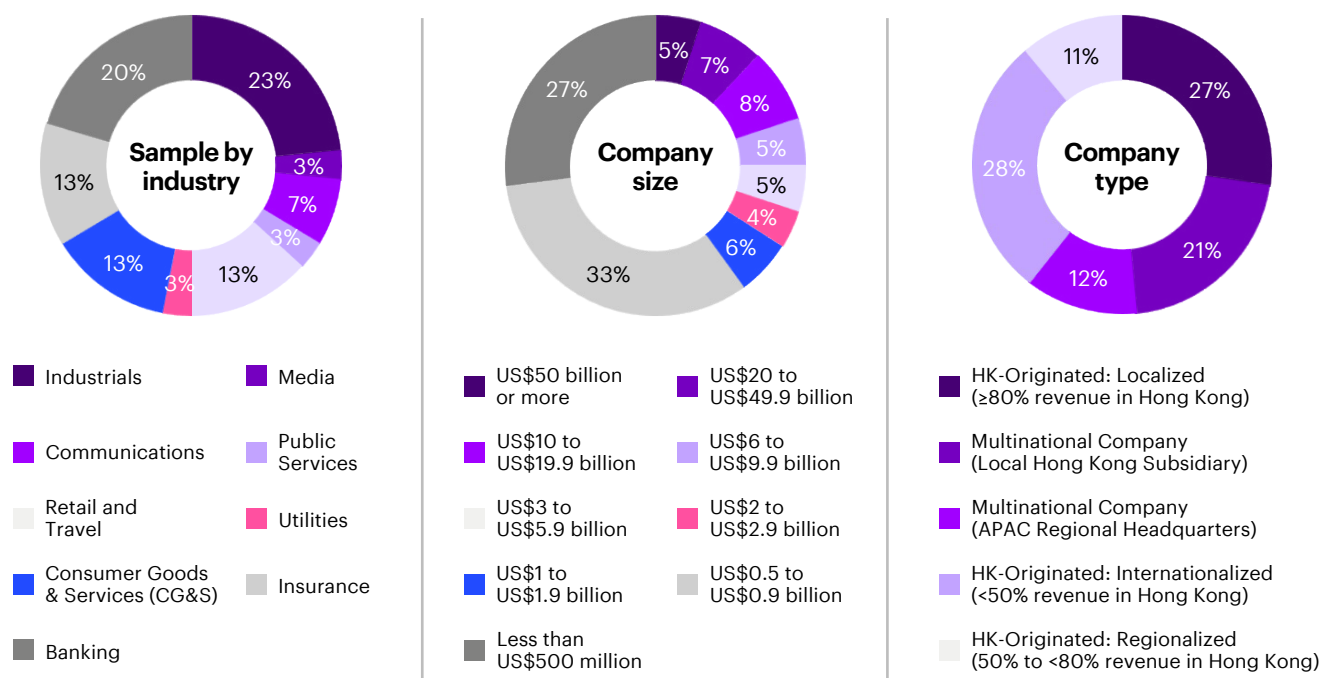
Hong Kong has the ecosystem, the institutions and the market position to make AI-led growth real. Enterprise capability is what converts that position into growth. What its companies build now determines what Hong Kong's economy becomes.

About the research

Survey of C-suite and senior leaders

Between March and April 2026, we surveyed 150 C-suite and senior leaders in Hong Kong. The respondent base spans nine industries (banking, insurance, consumer goods and services, utilities, retail and travel, public services, communications, media and industrial)²³ and organizations ranging in size from less than \$500 million to \$50 billion or more in revenue.

We also classified organizations into five types by their presence in Hong Kong and geographic footprint. We grouped organizations of Hong Kong origin as localized ($\geq 80\%$ of revenue generated in Hong Kong), regionalized (50% to $<80\%$), or internationalized ($<50\%$). We classified multinational companies separately as either Asia Pacific (APAC) regional headquarters or local Hong Kong subsidiaries.



Note: Percentages are rounded to the nearest whole number and may not sum to 100%.

The survey assessed Hong Kong firms' readiness to scale AI across 10 capabilities, initially identified in Accenture's Front-Runners research. This framework comprises:

- Five foundational capabilities, covering AI and data strategy, AI platforms, data management and governance, talent and RAI.
- Five new AI and data essential capabilities for gen AI, covering LLMOps, new data-management essentials, data sources, foundation-model practices and talent practices.

Accenture Hong Kong AI Index

To develop the index, we scored each capability on a 0–1 scale:

- We normalized response categories across the scale.
- Where a capability draws on multiple survey questions, we averaged the normalized item scores.
- The resulting 10 capability scores collectively formed the Accenture Hong Kong AI Index.

To classify respondents into three AI capability clusters (Starters, Pursuers and Vanguard), we used the 10 capability scores as inputs for a probability-based classification model calibrated on the sample from Accenture's global Front-Runners research. The model estimated which global capability profile each Hong Kong respondent most closely resembled and assigned the respondent to the corresponding capability group. We then used these groups to compare capability levels, AI execution and business outcomes across Hong Kong firms.

Executive interviews

We conducted executive interviews with organization leaders to test and contextualize the survey findings and explore how they were reflected in real-world applications.

Complementary sources

The analysis in this report also draws on Accenture's 2026 CxO and Employee Pulse of Change surveys.

Note: We use generative AI in our research production process. Our research experts review and validate the generative AI outputs with traditional research methods where possible, applying Accenture's Responsible AI standards.



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About Accenture

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