

Transformation in the AI Era



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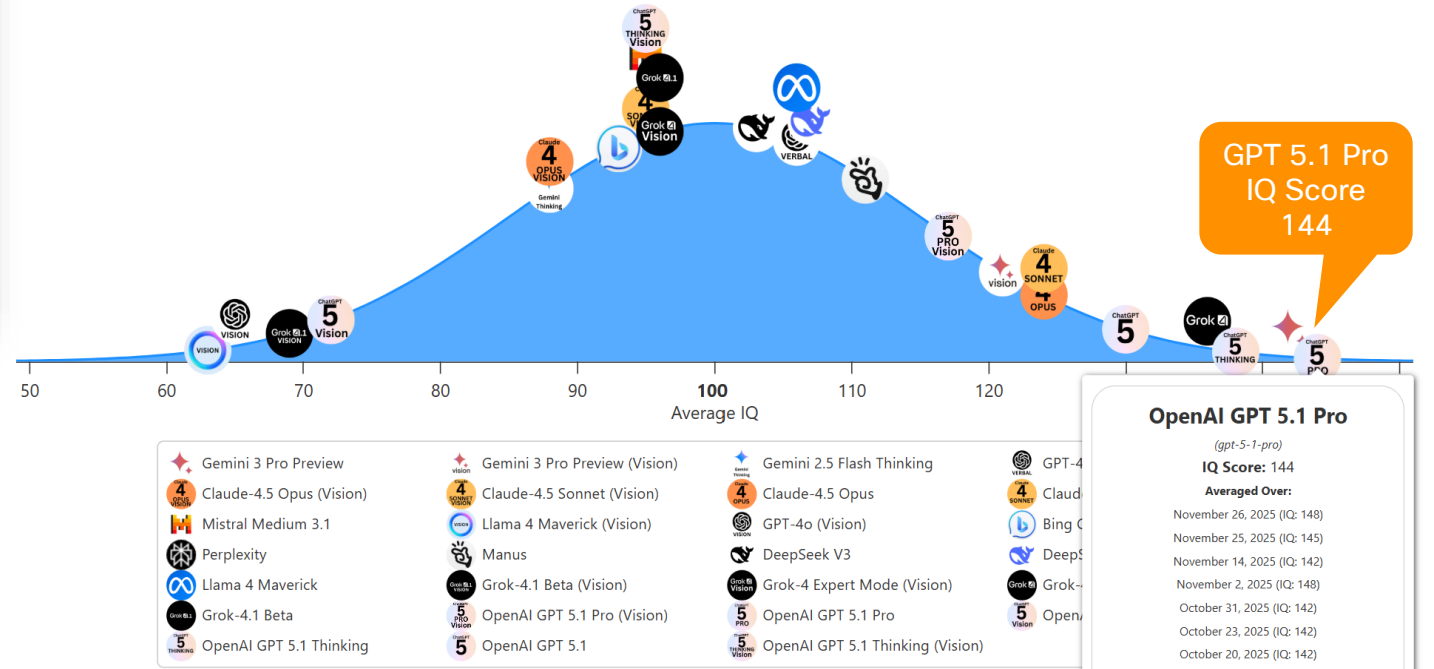
AI Paradigm: the Singularity is near



IQ Test Results

TrackingAI.org
Mensa Norway quiz
A MaximumTruth.org Project

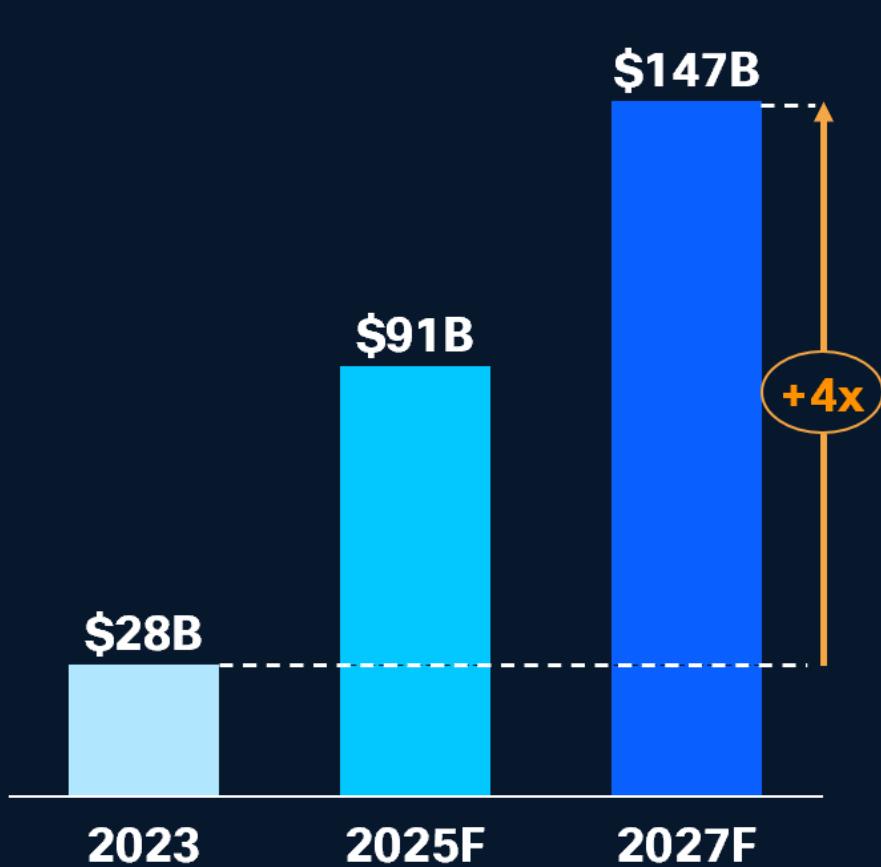
Mensa Norway IQ Scores (Average of last 7 tests)



Source: Mensa Norway IQ Scores

China is leapfrogging in the AI era

China AI Capital Expenditure (\$B)



	 deepseek	 ChatGPT
# of Parameters	0.7 Trillion	~2 Trillion
Model	Open-source	Proprietary
Training Cost	<\$10M	\$100M

AI will make our world of 8B people feel like one with the capacity of 80B

AI AGENTS



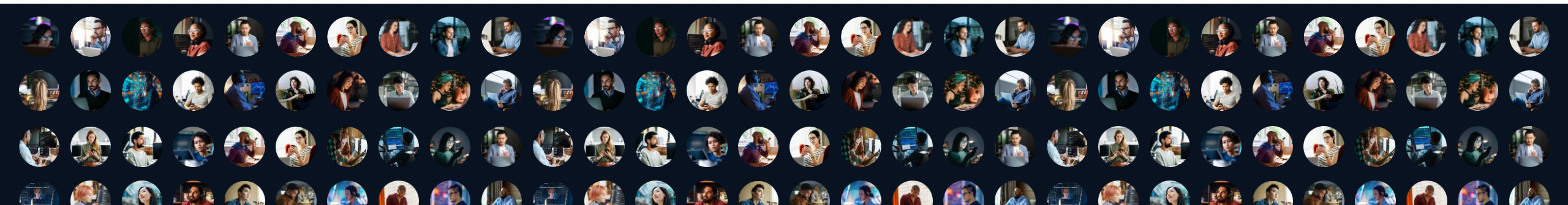
AI APPS



ROBOTS



HUMANOIDS



Cisco on Cisco

</> Engineering

Software engineering agents for faster, better development

Test case generation & troubleshooting



Sales

AI Insights for Sales

AI Assistant for Sales

Exec Console

Cisco-wide Internal AI Assistant (CIRCUIT)

Unified Account Planning



Customer Experience

AI Agent for Renewals

AI Agent for Customer Support

AI Agent for Customer Adoption



IT

CIRCUIT

AI for IT Help Desk

BasePod GPU Cluster

**Infrastructure
constraint**

**Trust
deficit**

**Data
gap**

From Cisco AI Readiness Index: Pacesetters are leading in their way

All companies

~64%

Capture stronger value

32%

Measure invest impact

18%

Finalize use case

34%

Use case revenue potential

31%

Secure/Control AI agents

46%

Network Scalability

42%

Aware of AI cybersecurity threats

Pacesetters

90%+

95%

77%

71%

75%

98%

87%

7 Best Practice from AI Pacesetter

- 1. System-Level AI Strategy (Not Just Pilots)
- 2. Data Foundation and Governance.
- 3. Modern Infrastructure Designed for AI.
- 4. Cross-Functional AI Talent and Culture.
- 5. Value-Based Prioritization.
- 6. Responsible AI and Trust.
- 7. Continuous Learning + Feedback Loops.

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Source: Cisco AI Readiness Index 2025



Q1 – What are CEO's Top Priorities in the AI Era?

投资决心坚定，AI已成战略必选项

尽管面临经济不确定性，中国CEO仍坚定地将AI视为企业优先投资项，视其为发展的核心引擎

59%

的中国CEO将AI视为优先投资项(高于去年的57%)

83%

的中国CEO预测未来一年企业AI预算比重将达10%以上

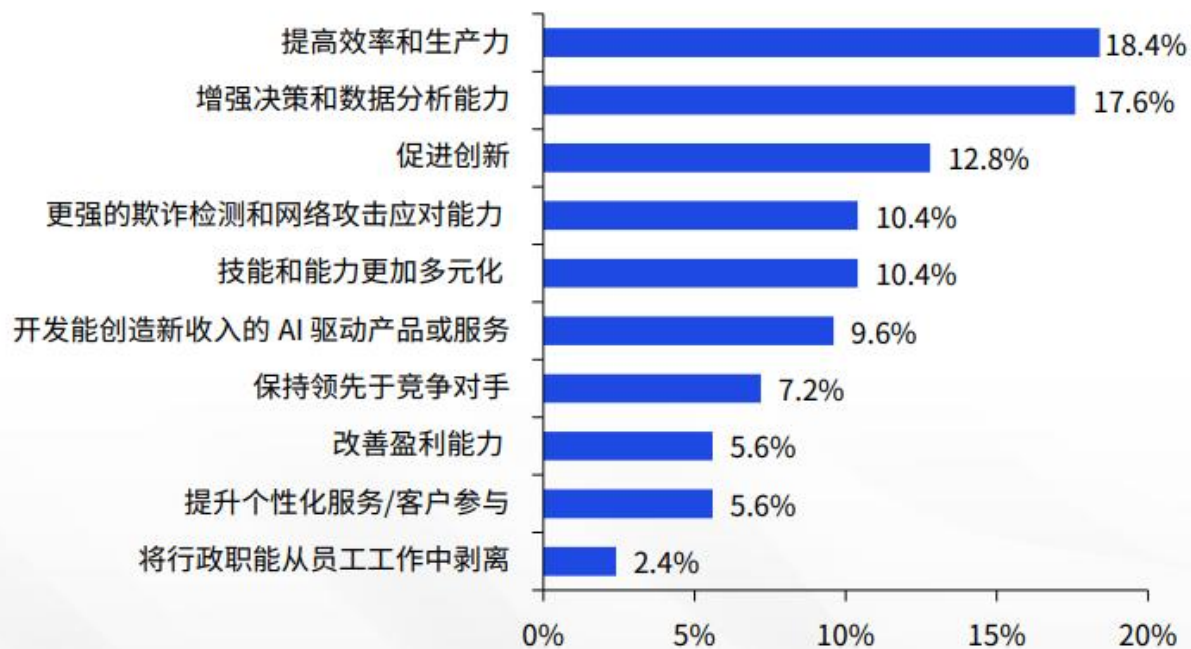
549起

前三季度国内AI领域投融资，远超2024年全年总和(482起)

45%

AI行业应用投资占比，表明场景落地需求显著增长

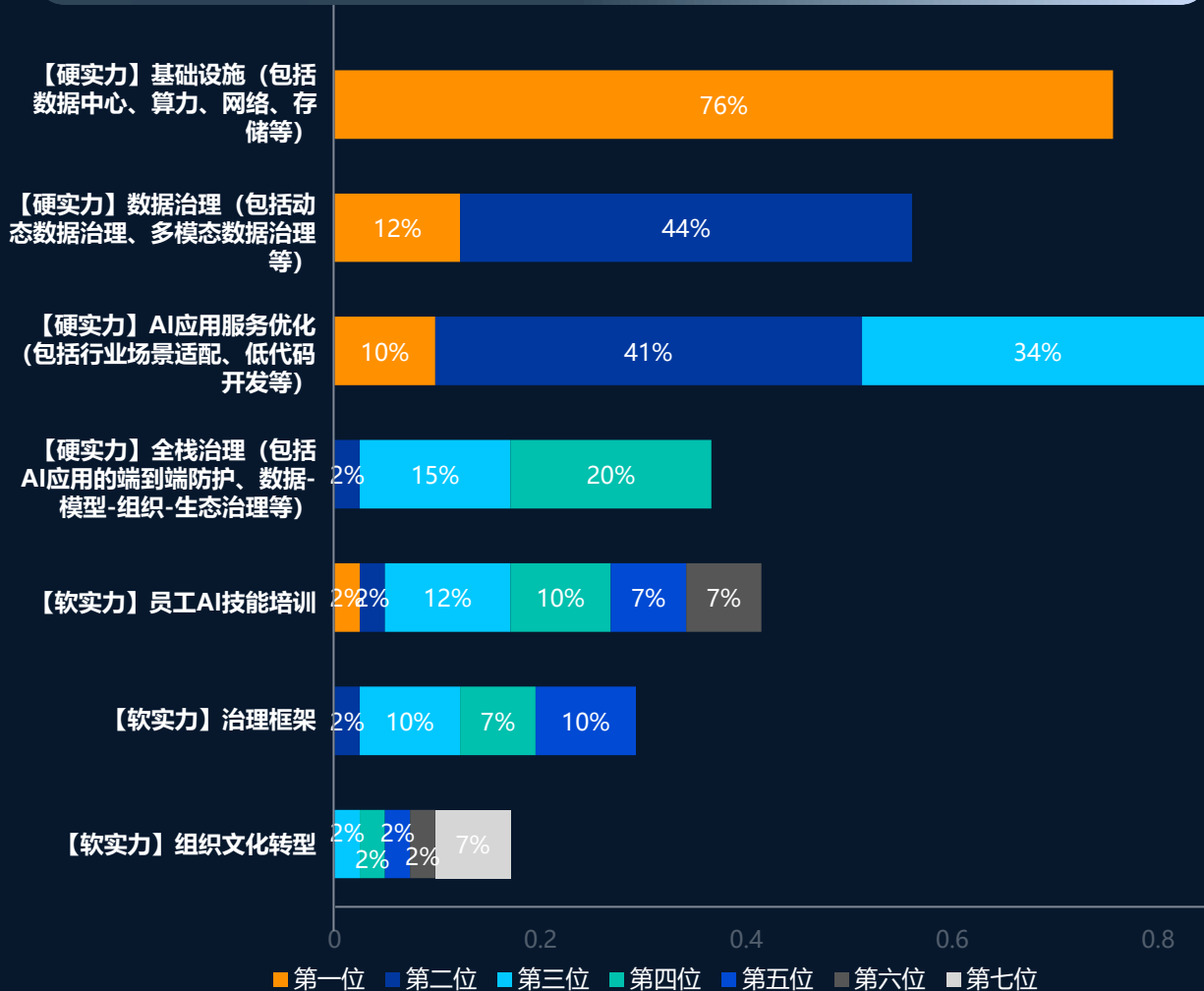
中国CEO认为在企业中实施AI的最大好处，%



数据来源：毕马威《2025年全球首席执行官展望》

Q2 – What initiatives are they taking? What are the most innovative AI use case now?

调查企业AI Ready的硬实力与软实力布局优先级排序 (多选排序)



硬实力：基建先行，奠定技术底座

76% 核心基石：76%的受访企业将基础设施建设作为AI布局的第一优先级

44% 关键支柱：基础夯实后，企业将重点转向数据和应用。44%与41%的企业分别

41% 将数据治理和AI应用服务优化列为第二优先选项

软实力：相对滞后，事后点状弥补

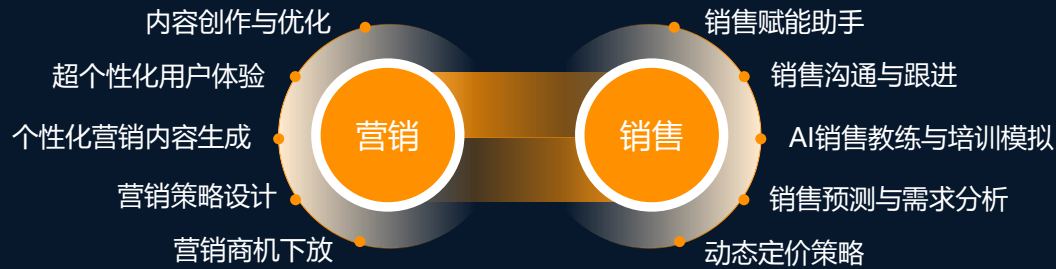
整体弱势：企业对本轮AI配套软实力的认知总体不全面，重视程度显著低于硬实力，倾向于哪里有问题补哪里，未全面化、体系化。

29% 具体表现：员工AI技能培训是调研样本中较为关注的选项，但优先级靠后。而

15% 治理框架与组织转型的选择比例更低。

Q2 – What initiatives are they taking? What are the most innovative AI use case now?

前台业务提升



中台经营决策

风控	合规	运营和供应链	服务与数据分析
风险识别	外规侦测	运营优先级评估	客户服务与支持
风险特征生成	智能关联	运营指标生成与校验	数据清洗与预处理
风险评估	智能审阅	运营效能评估	交互式报表
风险预警与应对	行为侦测	供应链风险智能预警与预案生成	图谱生成推理
风险报告生成	整改时序	供应商沟通与管理	数据建模决策

后台精益管理

财务	人力资源	信息技术	网络安全
财务报告自动解读与摘要生成	智能员工手册与政策问答	智能IT客服	恶意软件检测与分析
发票/凭证智能处理	职位描述 (JD) 自动生成	代码生成与开发辅助	网络入侵检测与防御
财务数据处理与报表生成	智能招聘系统	代码审核/重构	漏洞扫描与识别
关键指标预测分析	智能简历筛选与面试安排	测试用例生成	安全监控与分析
财务监测与审核	员工发展路径个性化规划	网络与系统管理	安全评估与测试

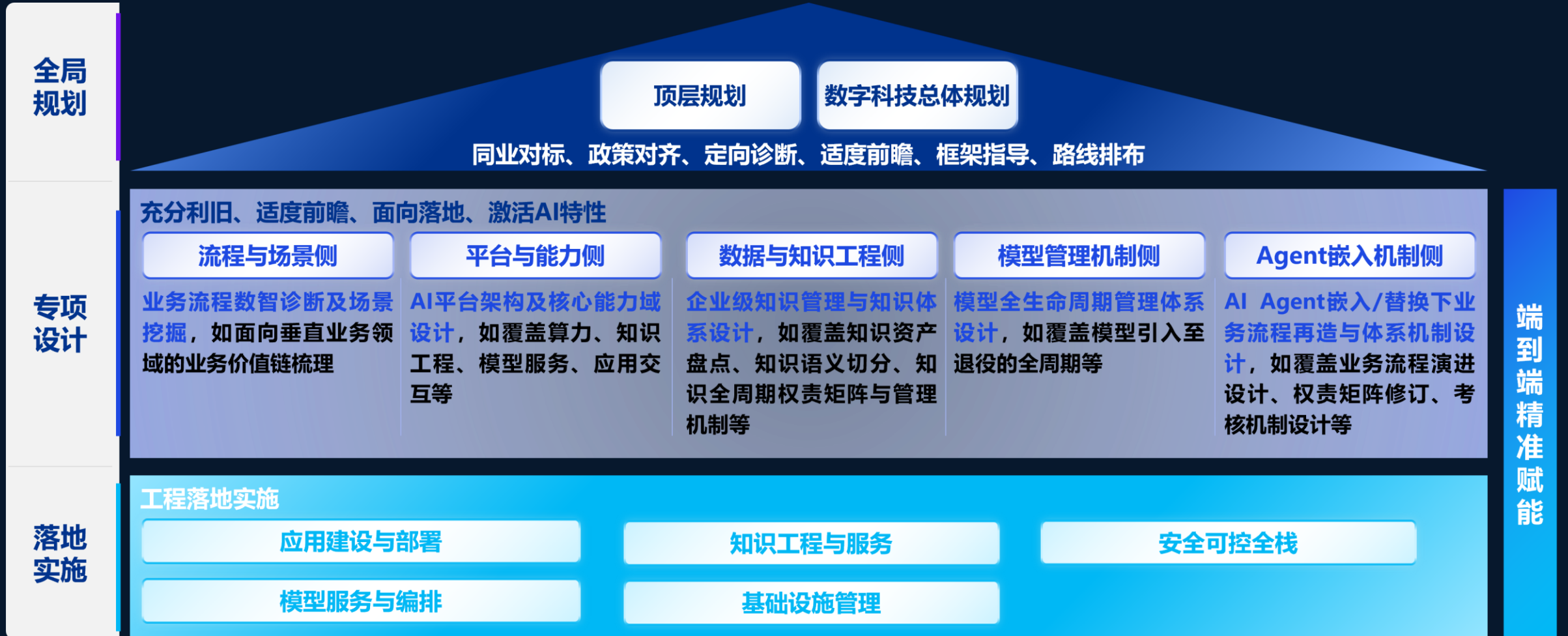
通用工具

办公管理		
文档/图片解析	音视频文本图片生成	邮件撰写
搜索与问答	智能写作	实时翻译
智能生成知识库	内容审核	会议助手

来源：毕马威：《生成式AI赋能产业变革的实践与路径》

Q3 – How China companies can be more AI Ready?

企业人工智能端到端落地框架



THANK YOU