

Bell

Bell enterprise AI study: The future of AI

In partnership with:



October 2025

Study background and methodology

This study was conducted in partnership with Harris Poll Canada to explore the state of AI adoption among large Canadian enterprises.

Fielded in October 2025, the survey gathered responses from 207 senior IT and AI decision-makers at companies with 1,000 or more employees, spanning various sectors and provinces. The research examined current practices, future plans, organizational readiness, and strategic priorities – including data sovereignty, infrastructure readiness, and sustainability.

Respondents, referred to as “Business Leaders,” provided insights into both centralized and decentralized AI usage. “Large” businesses are defined as those with 1,000 – 4,999 employees, while “very large” refers to firms with 5,000+.

Executive summary

Canadian enterprises are entering a pivotal phase in AI adoption. With 96% of large businesses expecting AI usage to grow over the next three years, the shift is no longer speculative – it's strategic. Yet, scaling AI remains complex.

This report outlines how Canadian organizations are navigating the opportunities and challenges of enterprise AI, with a focus on infrastructure readiness, data sovereignty, and sustainability.

While the findings confirm strong momentum behind AI adoption, they also reveal a more complex reality. Beneath the enthusiasm lie foundational challenges such as talent shortages, poor data quality, compliance risks, and infrastructure gaps.

Data sovereignty is emerging as a central concern, with many businesses prioritizing Canadian-based infrastructure to protect sensitive information. At the same time, environmental sustainability is becoming a key factor in AI planning, as organizations seek energy-efficient, low-carbon solutions that align with their broader ESG commitments.

96% of enterprises expect rapid AI growth and **75%** call it a strategic priority, but only **40%** feel 'very ready' to scale citing data, talent, and compliance as key barriers.

Momentum: AI adoption is surging

Artificial Intelligence (AI) has moved from the periphery to the core of enterprise strategy for Canadian businesses. Three-quarters of organizations now view AI as a strategic, enterprise-wide priority.

This surge is not merely about experimentation; it reflects a deepening commitment to AI as a transformative force.

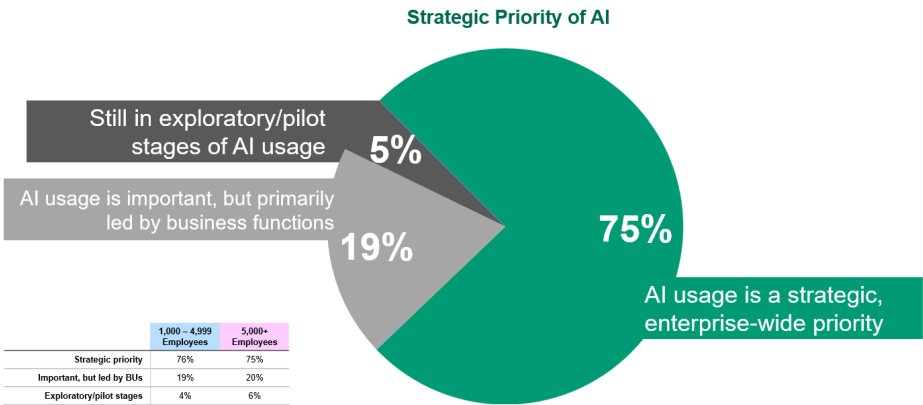
On average, Canadian enterprises are deploying AI across 7.1 distinct use cases, ranging from quality control and customer service to innovation and decision-making.

81% of large Canadian businesses expect to fully integrate AI into their operations within the next two years, including 30% who plan to do so within the next year.

Only 2% say they have no timeline for AI integration.

This widespread adoption signals a new era where AI is embedded into the fabric of operations, products, and services.

Three-quarters say AI usage is a strategic, enterprise-wide priority

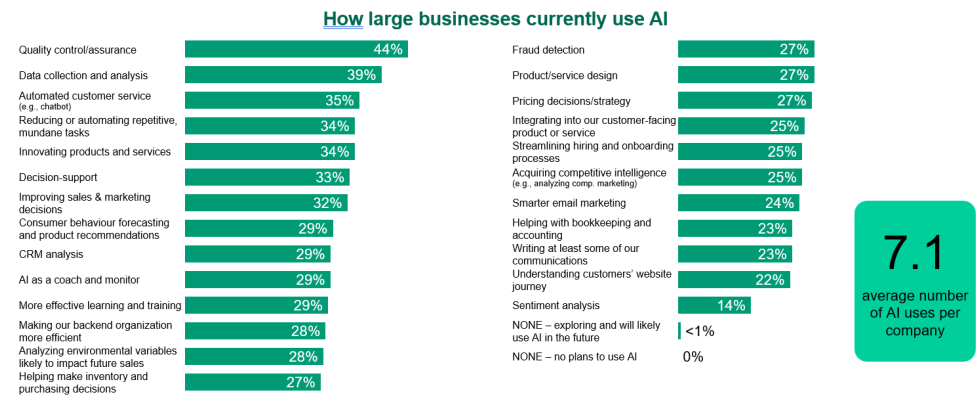


QA4: Which of the following best describes how your organization is thinking about and approving the use of AI within the company?

The Harris Poll

[Click here for full size \(page 12\)](#)

Canadian businesses use AI for an average of 7 different purposes per company; quality control, data collection/analysis, and automated customer service are most common



QA1: Does your organization use Artificial Intelligence in any of the following ways? For this question, please think both about centralized AI usage authorized or encouraged by the company, as well as decentralized usage by individual employees (to the best of your knowledge). Please select all that apply.

The Harris Poll

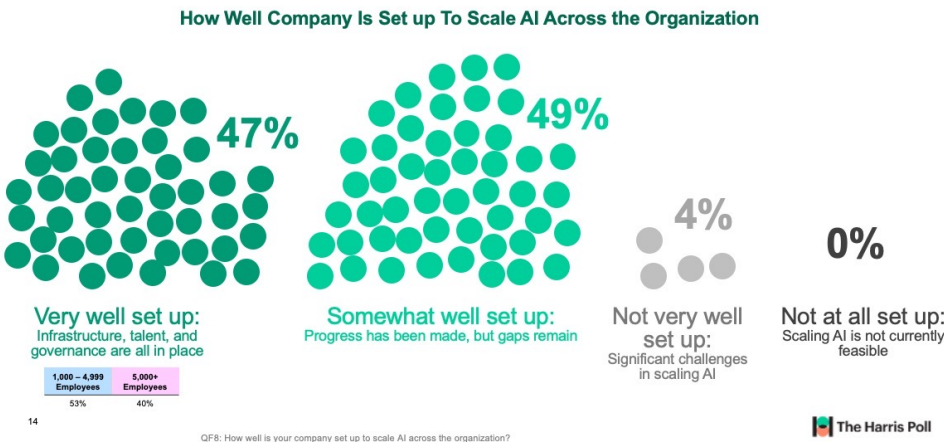
[Click here for full size \(page 13\)](#)

Readiness gap: scaling confidence is low

Despite widespread adoption, only 47% of businesses feel 'very well set up' to scale AI across their organizations.

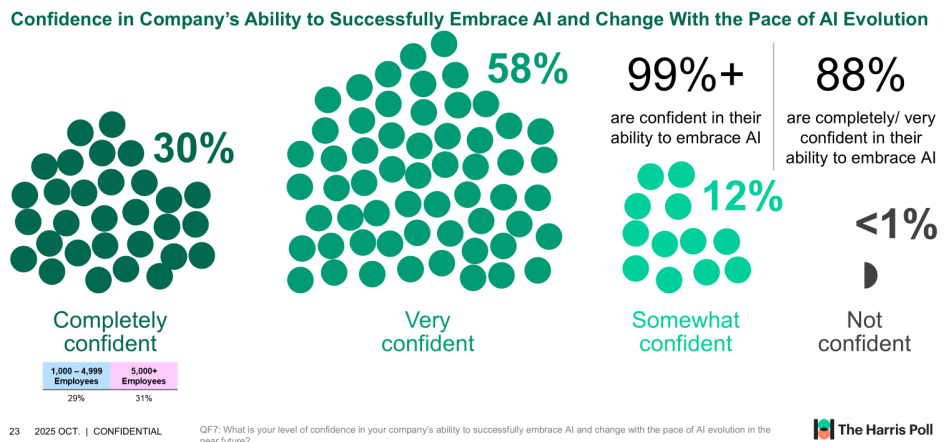
Similarly, most businesses are confident/somewhat confident in their ability to keep up with the pace of AI evolution, however, only 30% are completely confident – leaving some hesitation, more so for larger enterprises.

Nearly all large Canadian businesses feel at least somewhat well set up to scale AI across their organizations, larger companies feel less well-prepared



[Click here for full size \(page 14\)](#)

While most are confident in their company's ability to successfully embrace AI and change with the pace of evolution, there is room for improvement; just three-in-ten say they are *completely confident*



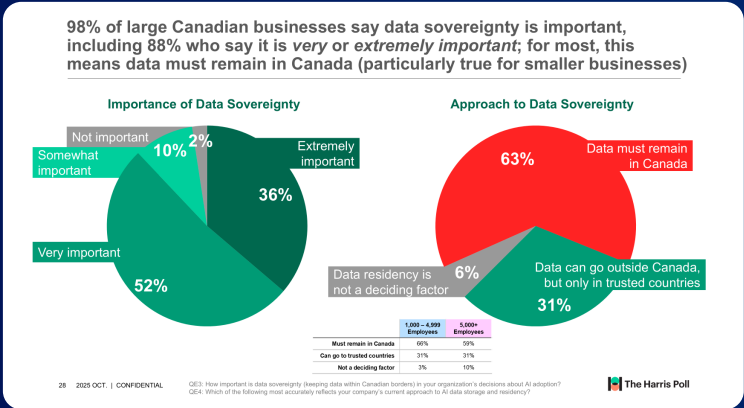
[Click here for full size \(page 15\)](#)

Emerging strategic priorities: sovereignty & sustainability drive decisions

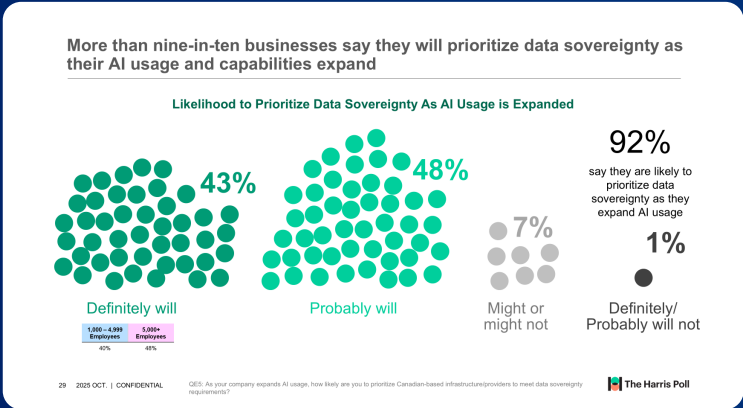
Data sovereignty has emerged as a key priority with 88% of large businesses saying that it's very/extremely important and more than 90% saying that they will prioritize data sovereignty as they continue to increase adoption.

Additionally, over 90% of businesses say keeping sensitive data within Canadian borders is valuable, with the majority of Canadian business leaders concerned about foreign governments accessing company data used in AI applications. 42% believe such access is likely and 48% saying it would be very concerning if it occurred.

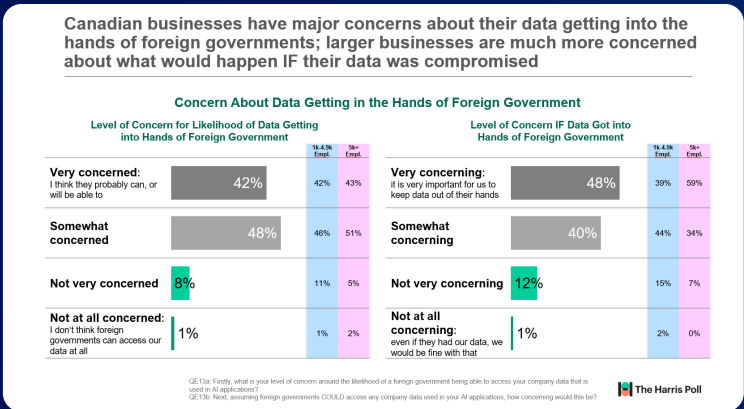
Data sovereignty concerns are also a major barrier to scaling AI: Canadian business leaders report an average of 2.8 concerns per company about storing or processing AI-related data outside Canada. The top concerns include cybersecurity risk, compliance with Canadian data residency requirements, higher costs of ensuring compliance abroad, and exposure to foreign government surveillance.



[Click here for full size \(page 16\)](#)



[Click here for full size \(page 17\)](#)



[Click here for full size \(page 18\)](#)

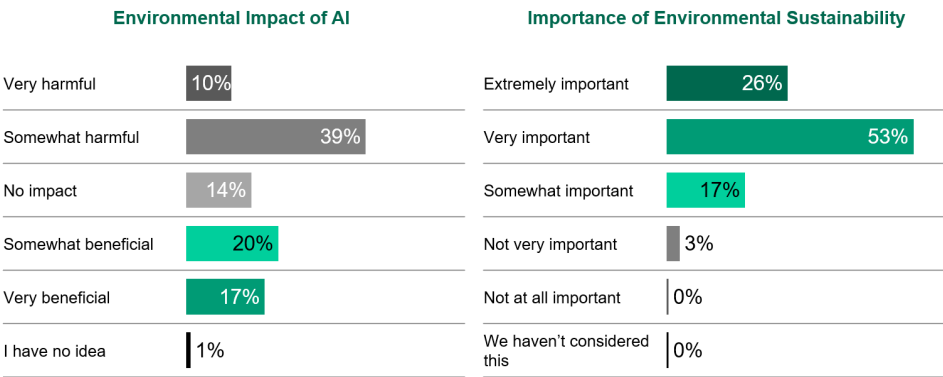


[Click here for full size \(page 19\)](#)

Emerging strategic priorities: sovereignty & sustainability drive decisions

Simultaneously, as AI adoption grows, **environmental sustainability** is becoming a key consideration for Canadian enterprises. 79% of business leaders say sustainability will influence future AI decisions—highlighting a shift toward responsible infrastructure choices that minimize energy use, emissions, and environmental footprint.

While business leadership in general seems unsure of the environmental impact of AI, most say environmental sustainability will be an important factor as they make decisions about AI adoption and scaling

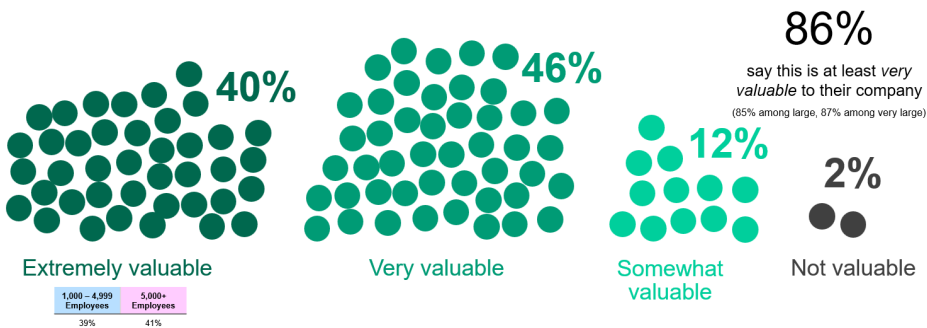


Q67: How would you describe the environmental impact of AI (e.g., energy consumption, emissions from large-scale compute, water usage, etc.)
Q68: How important is environmental sustainability (e.g., energy usage, carbon footprint) in your organization's decisions about AI adoption and scaling?
The Harris Poll

[Click here for full size \(page 20\)](#)

86% say it would be valuable for them to have an AI platform designed with energy-efficiency in mind

Value: This AI platform and facilities are designed with energy-efficient infrastructure, sustainable cooling systems, and low-carbon operations – such as the use of renewable energy sources like hydroelectric power – to minimize environmental impact while supporting high-performance AI workloads.



Q62: This AI platform and facilities are designed with energy-efficient infrastructure, sustainable cooling systems, and low-carbon operations – such as the use of renewable energy sources like hydroelectric power – to minimize environmental impact while supporting high-performance AI workloads. How valuable would you say this would be to your company?
The Harris Poll

[Click here for full size \(page 21\)](#)

Barriers: data quality, talent, and compliance

Scaling AI is not just about ambition – it requires solving foundational issues.

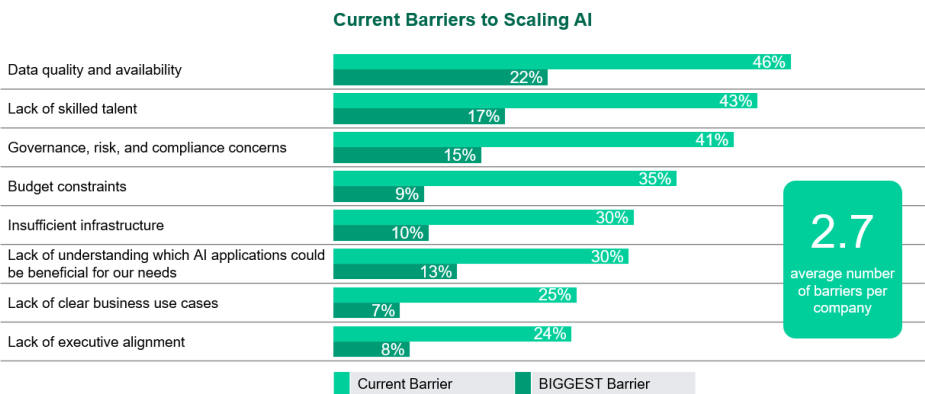
Businesses face an average of 2.7 barriers with data quality and availability, talent gaps, and compliance risks leading the list.

These challenges are consistent across industries and company sizes, underscoring the need for robust infrastructure and governance frameworks.

91% of Canadian business leaders are worried about proprietary product data being compromised, and 89% express similar concern about operational data.

Additionally, 86% are concerned about the exposure of customer, employee, and vendor information—highlighting trust and risk management as critical hurdles to scaling AI.

The average company is experiencing nearly three barriers to scaling AI; the most common barrier is *data quality and availability*

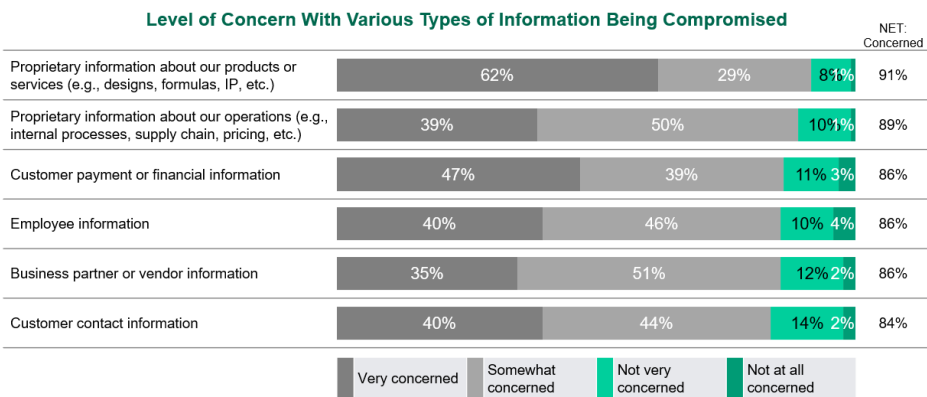


Q16a: Which of the following are currently barriers to scaling AI in your organization? Please select all that apply.
Q16b: You mentioned more than one barrier to scaling AI in your organization. From the following barriers you identified, please choose the ONE you feel is the biggest barrier at the current time.

The Harris Poll

[Click here for full size \(page 22\)](#)

Business leaders are concerned with a variety of different data being compromised, particularly proprietary information about their products or operations



Q16: When thinking about the security of various types of company data, how concerned would you be with all of the following being compromised?

The Harris Poll

[Click here for full size \(page 23\)](#)

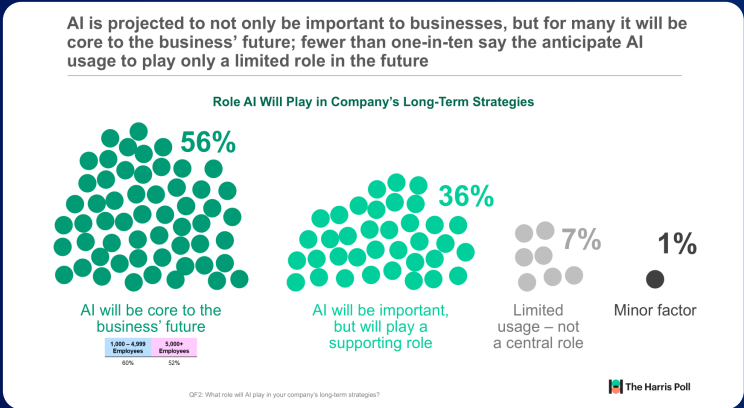
Outlook

Survey responses from Canadian business leaders confirm that AI is core to the future of businesses. It's no longer simply something to consider – it has become a present-day strategic priority.

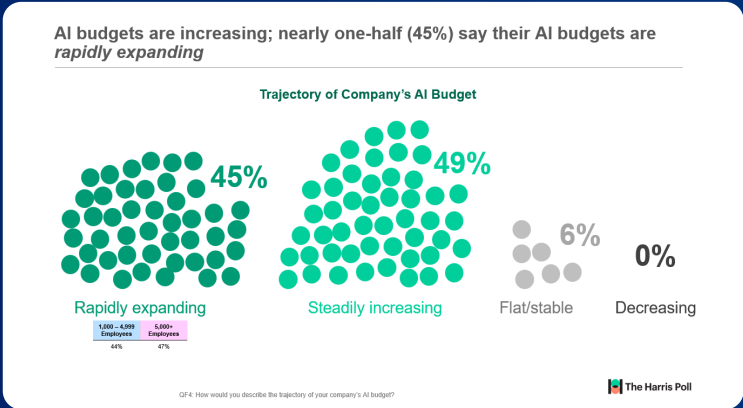
Adoption is accelerating rapidly, with 99% of enterprises planning continued investment over the next two years. Key areas of focus include R&D, platform licensing, workforce upskilling, infrastructure expansion and AI/ML talent acquisition.

This surge in activity is reflected in budget trends: nearly half of organizations report significant increases, with many describing their AI budgets as rapidly expanding.

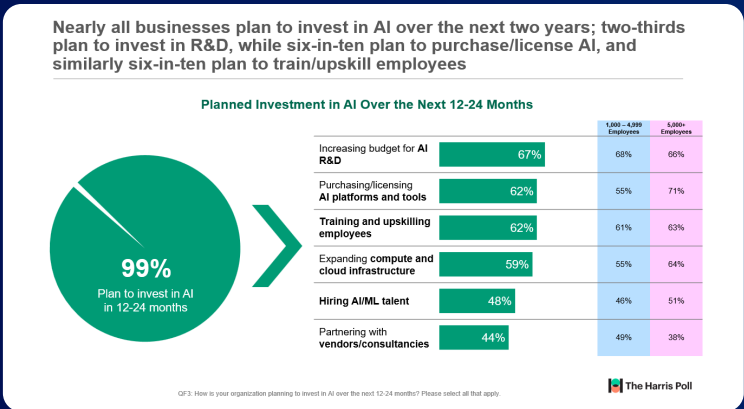
Despite this momentum, fewer than half of businesses feel well-prepared to scale. Foundational challenges such as infrastructure readiness, data quality, and talent – persist. Data sovereignty and sustainability are now emerging as central to enterprise business AI strategy planning.



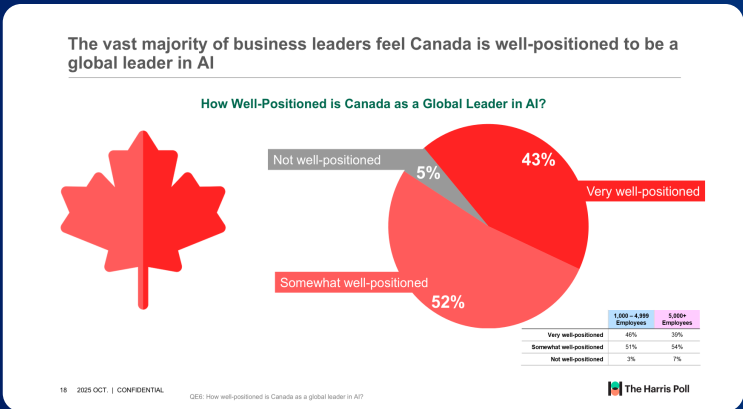
[Click here for full size \(page 24\)](#)



[Click here for full size \(page 25\)](#)



[Click here for full size \(page 26\)](#)

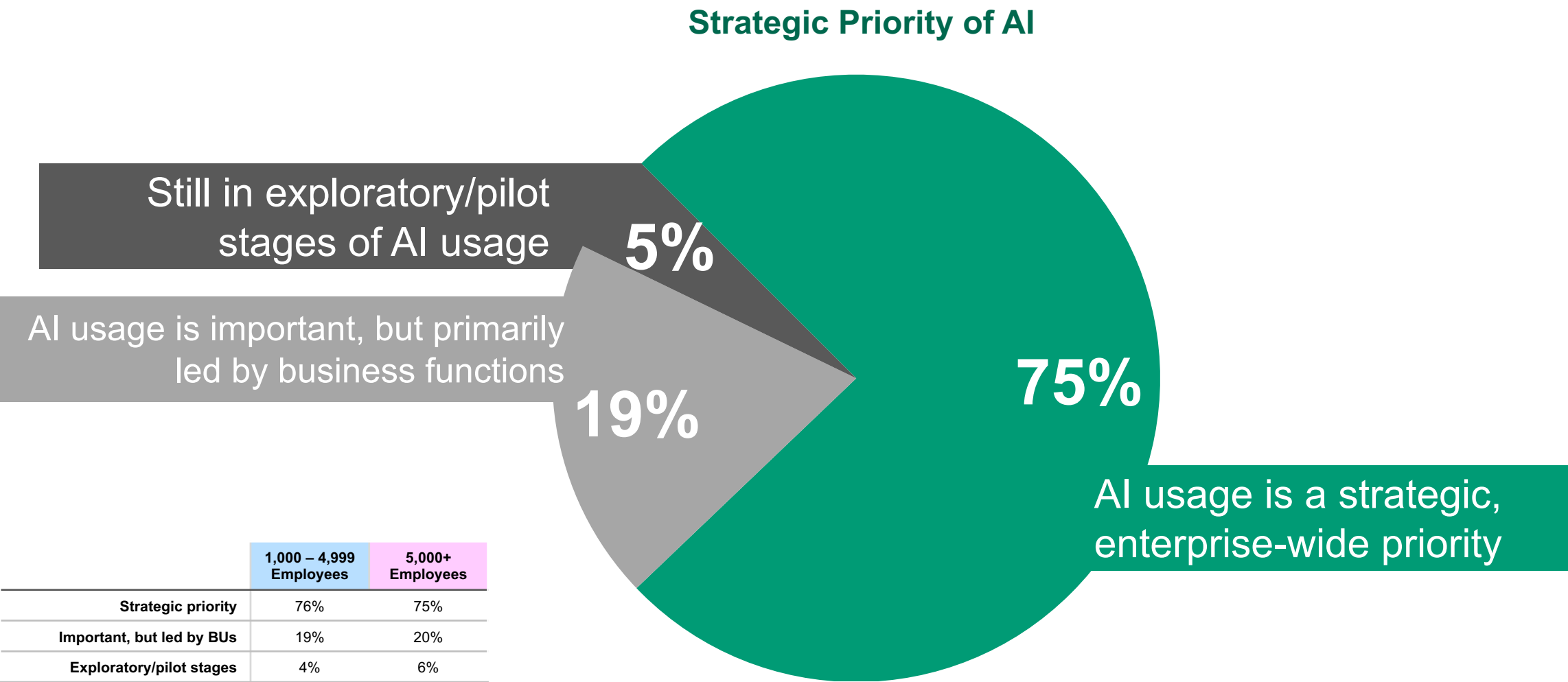


[Click here for full size \(page 27\)](#)

The question isn't if AI will scale – it's how, where, and under whose control.

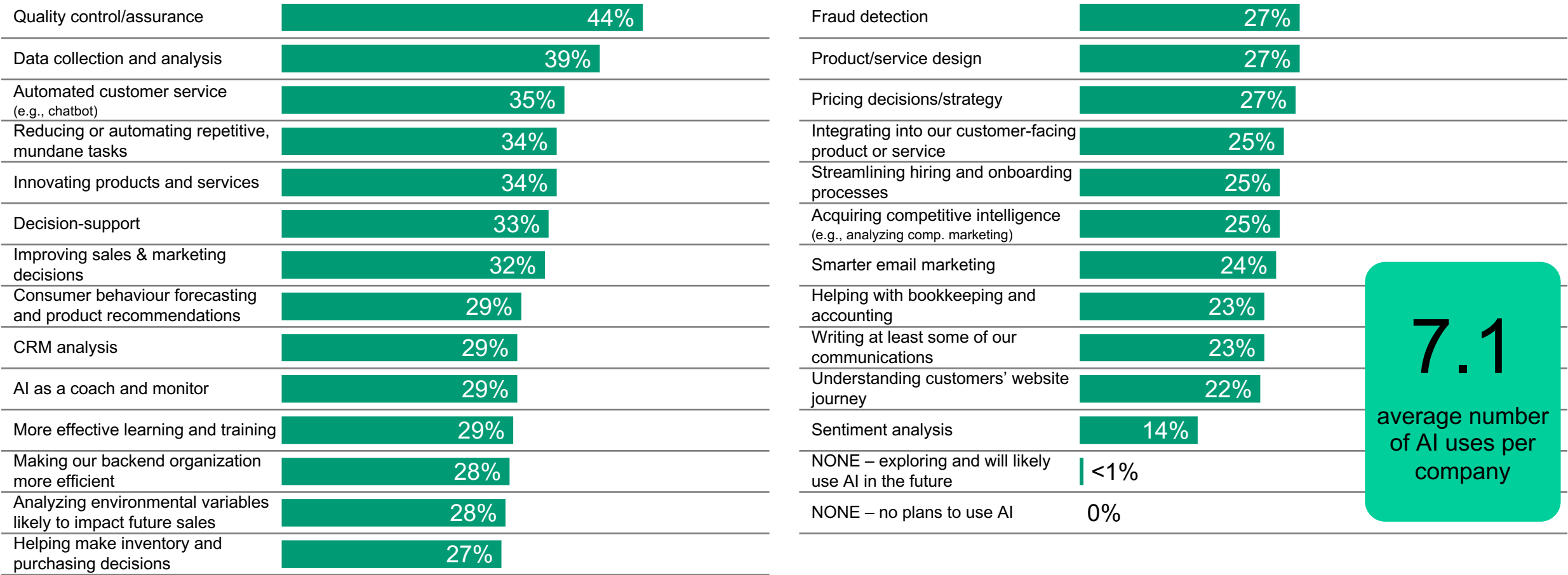
Appendix

Three-quarters say AI usage is a strategic, enterprise-wide priority



Canadian businesses use AI for an average of 7 different purposes per company; quality control, data collection/analysis, and automated customer service are most common

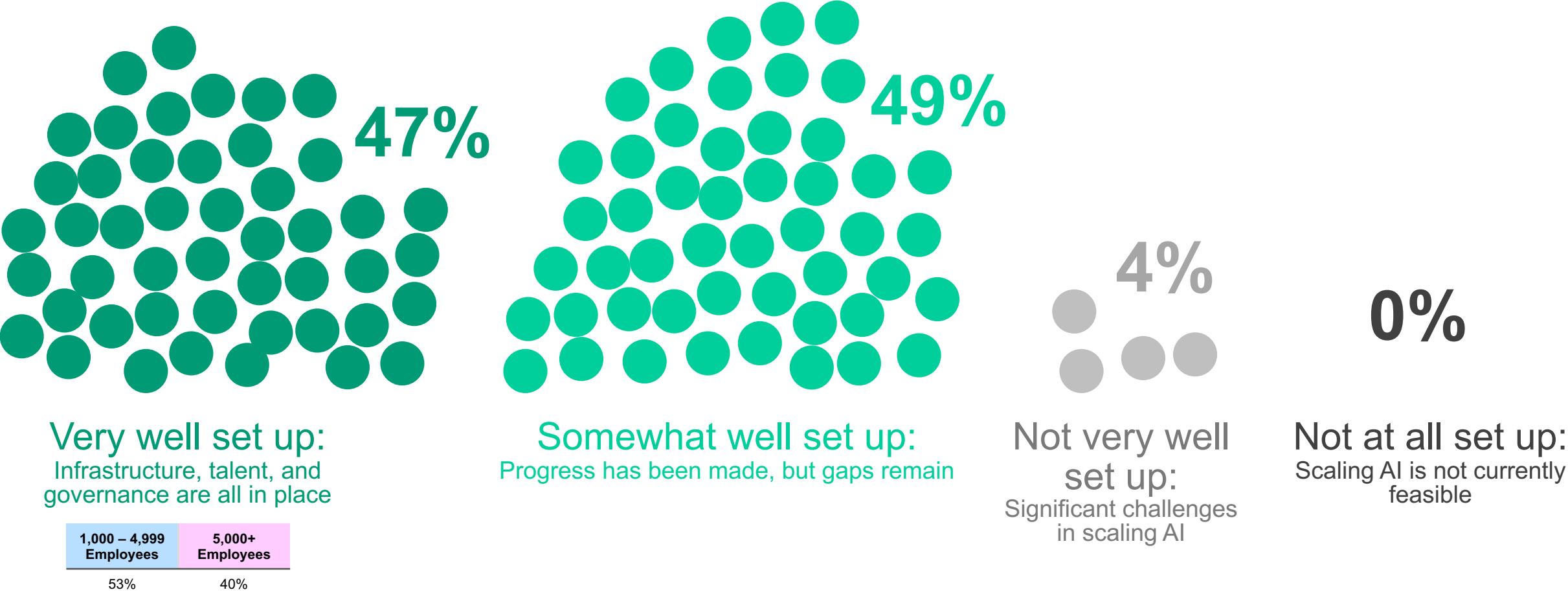
How Large Businesses Currently Use AI



7.1
average number
of AI uses per
company

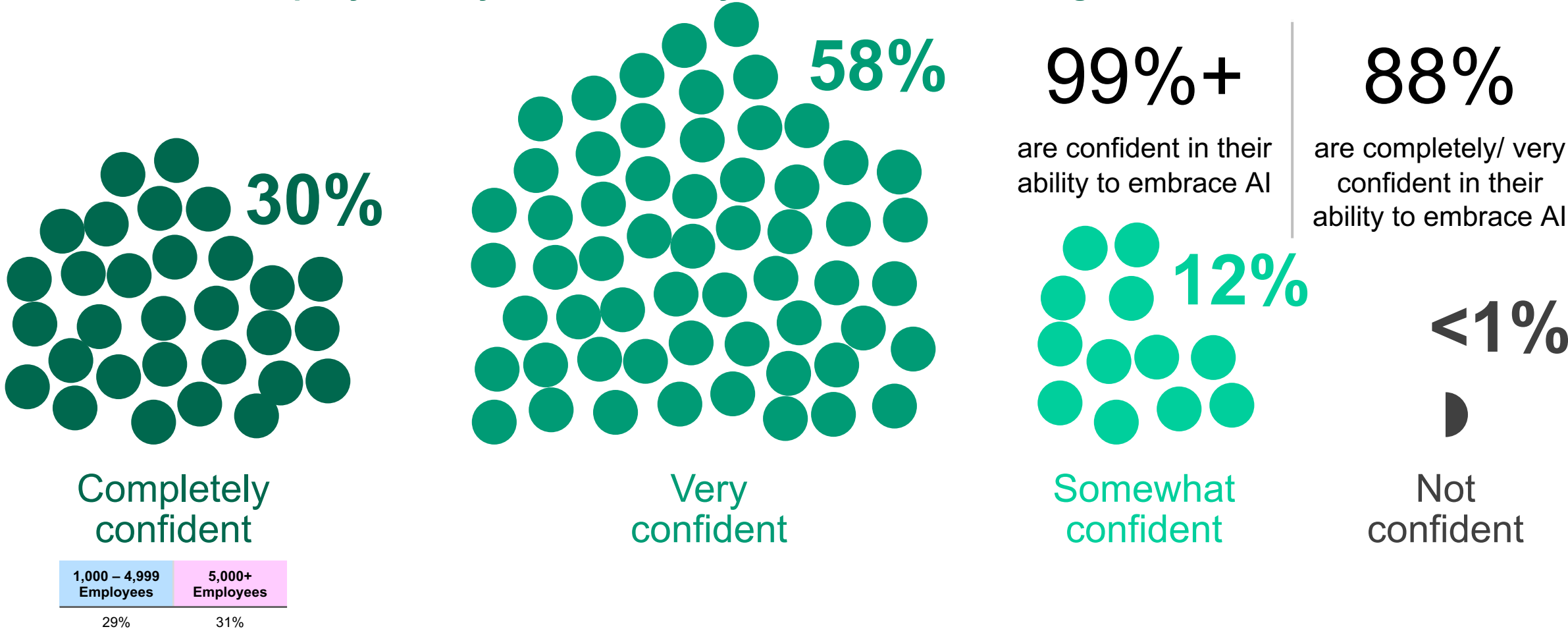
Nearly all large Canadian businesses feel at least somewhat well set up to scale AI across their organizations, larger companies feel less well-prepared

How Well Company Is Set up To Scale AI Across the Organization



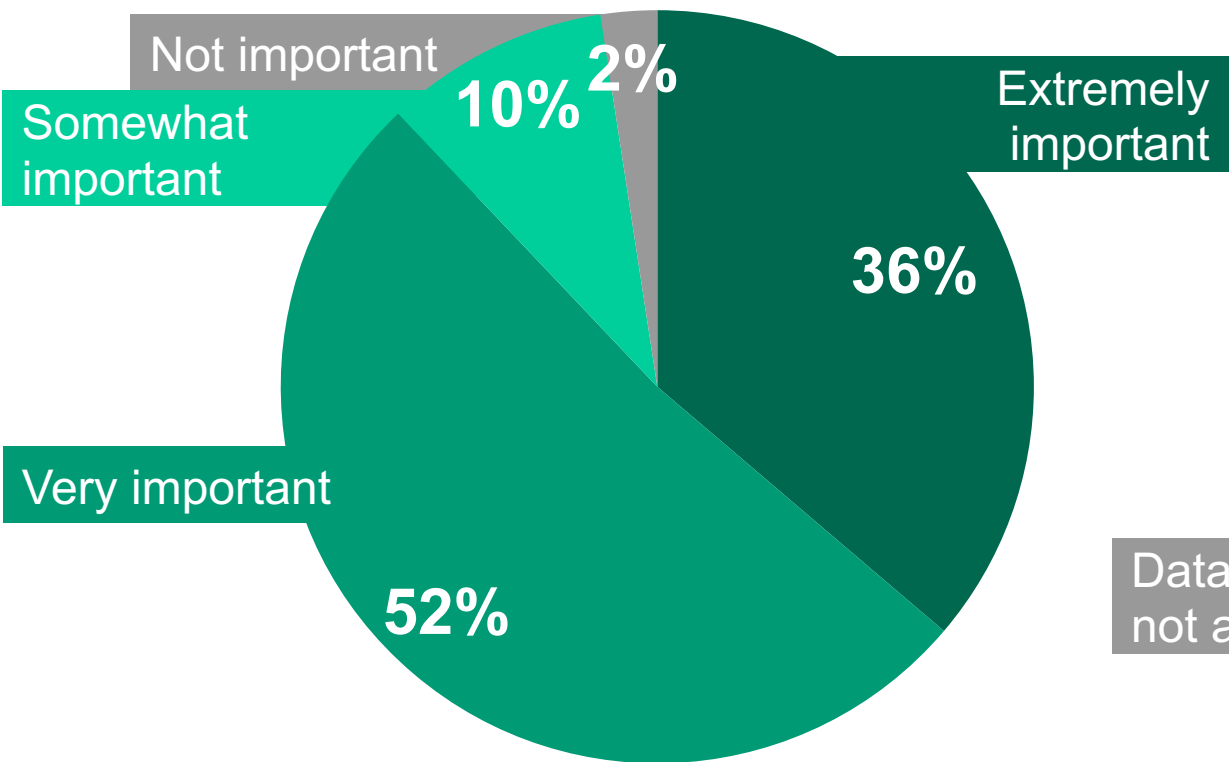
While most are confident in their company’s ability to successfully embrace AI and change with the pace of evolution, there is room for improvement; just three-in-ten say they are *completely confident*

Confidence in Company’s Ability to Successfully Embrace AI and Change With the Pace of AI Evolution

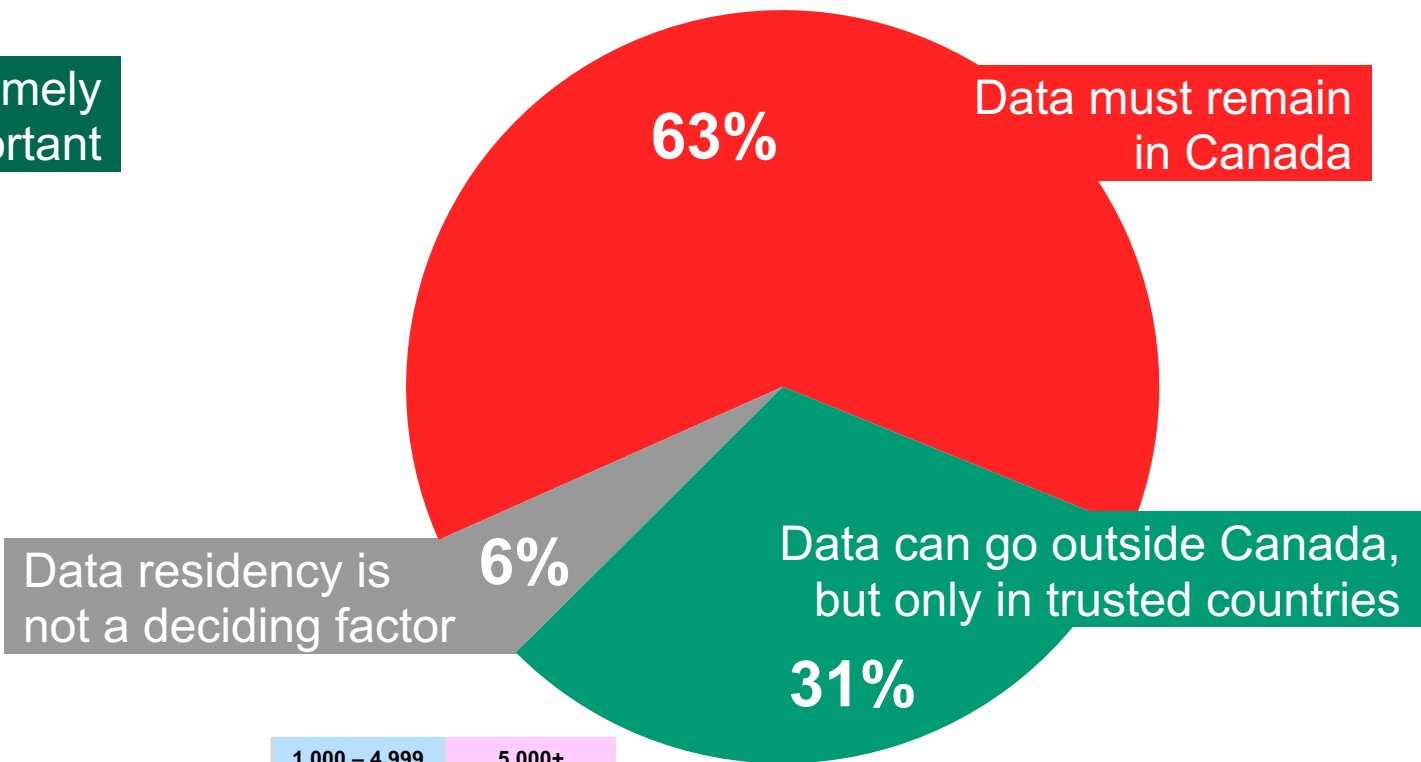


98% of large Canadian businesses say data sovereignty is important, including 88% who say it is *very* or *extremely important*; for most, this means data must remain in Canada (particularly true for smaller businesses)

Importance of Data Sovereignty



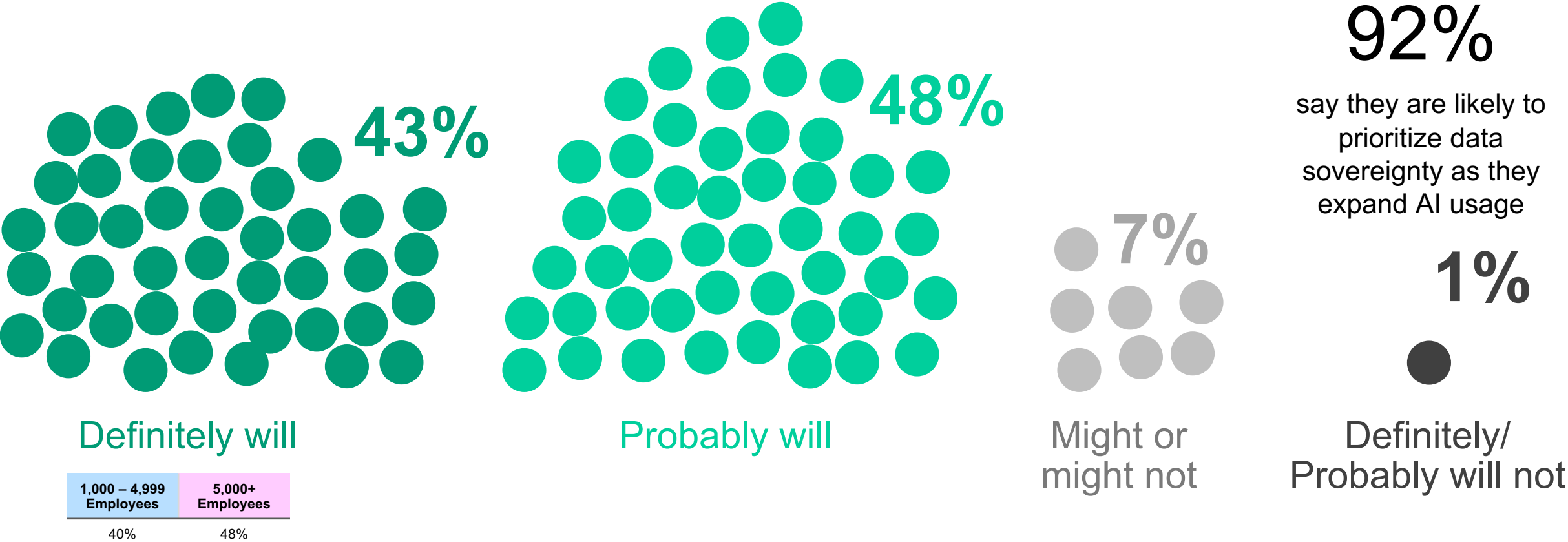
Approach to Data Sovereignty



	1,000 – 4,999 Employees	5,000+ Employees
Must remain in Canada	66%	59%
Can go to trusted countries	31%	31%
Not a deciding factor	3%	10%

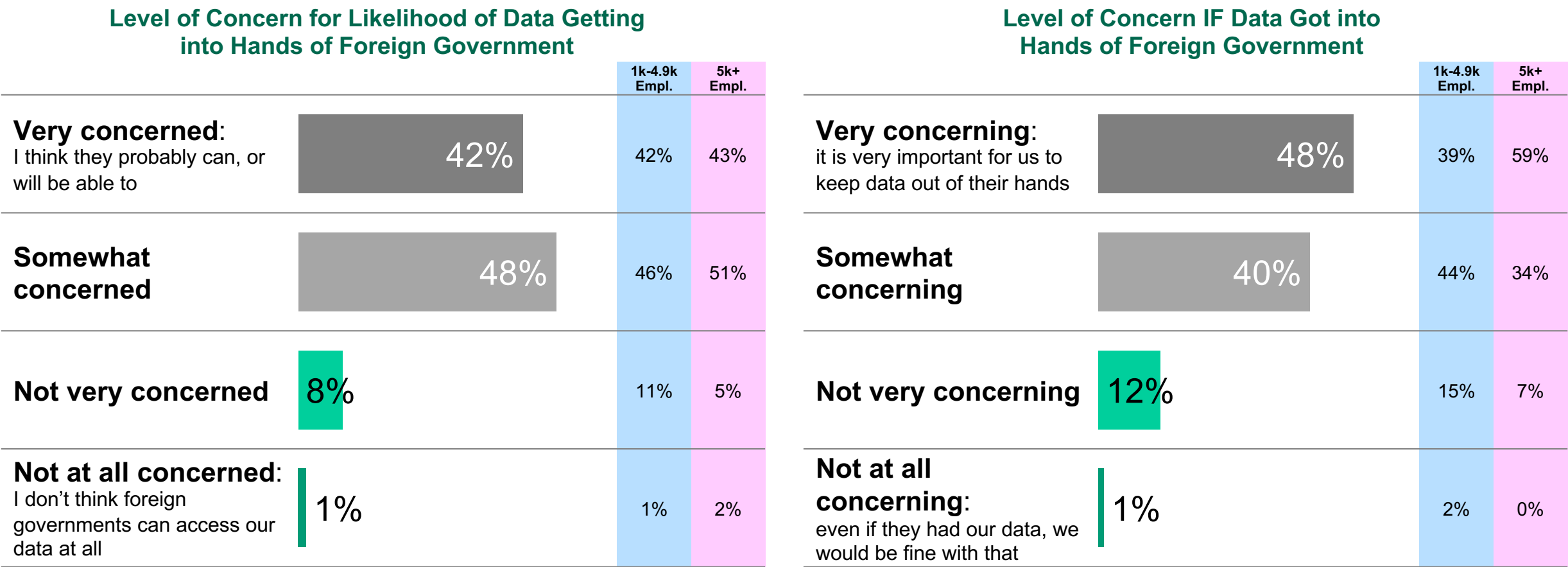
More than nine-in-ten businesses say they will prioritize data sovereignty as their AI usage and capabilities expand

Likelihood to Prioritize Data Sovereignty As AI Usage is Expanded



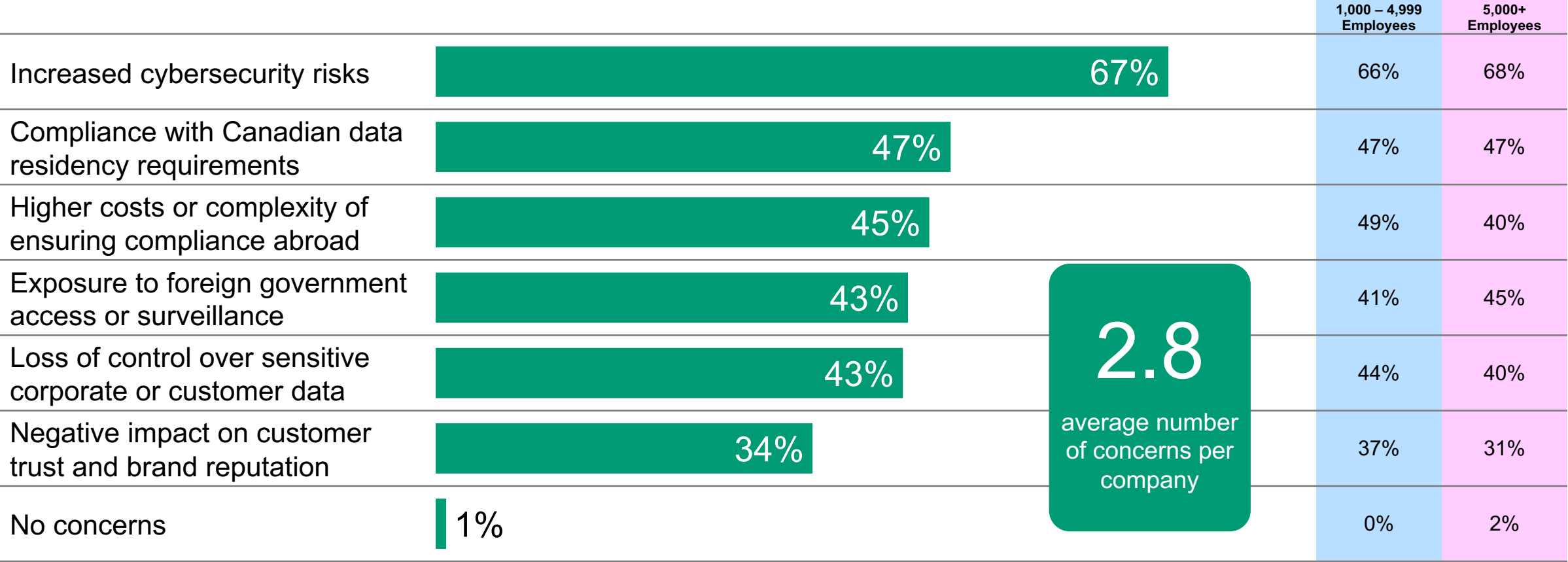
Canadian businesses have major concerns about their data getting into the hands of foreign governments; larger businesses are much more concerned about what would happen IF their data was compromised

Concern About Data Getting in the Hands of Foreign Government



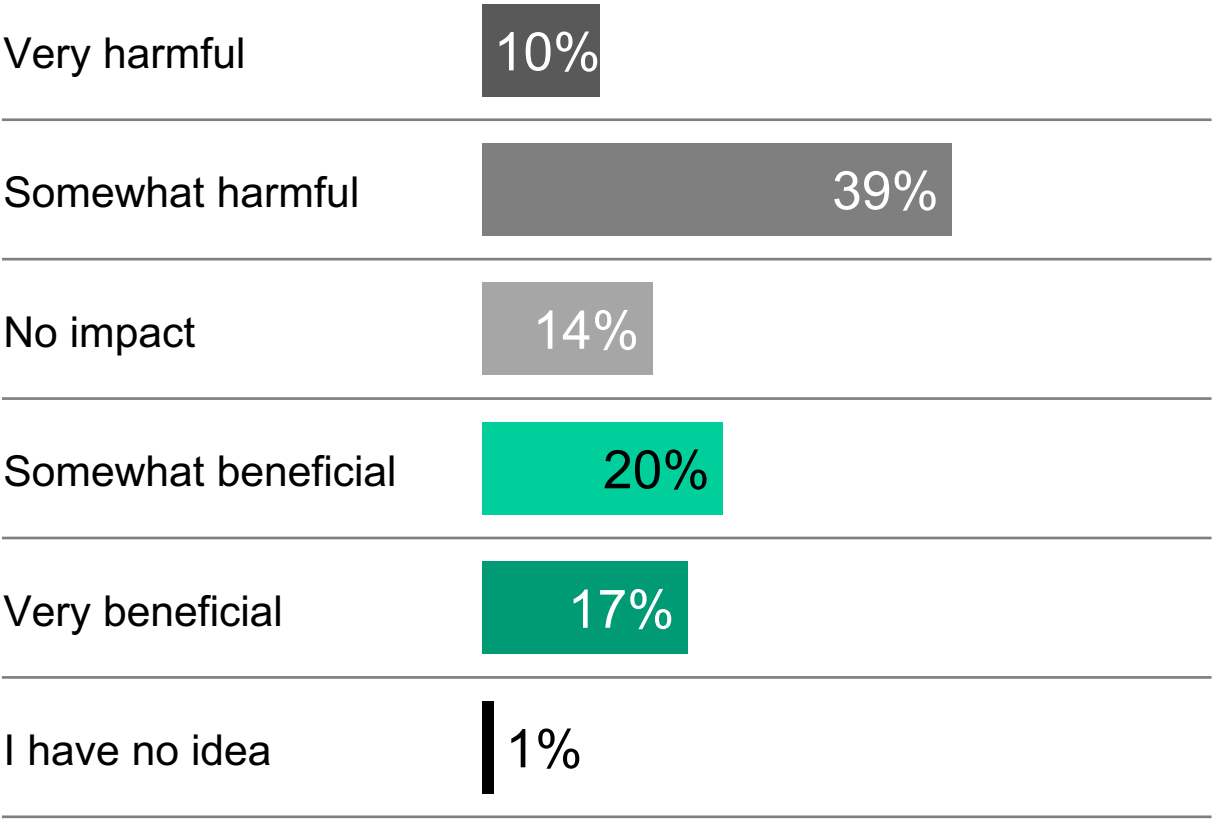
Business leaders have a variety of data sovereignty concerns, including cybersecurity risks, compliance risks, costs, and loss of control

Concerns With AI-Related Data Being Stored or Processed Outside Canada

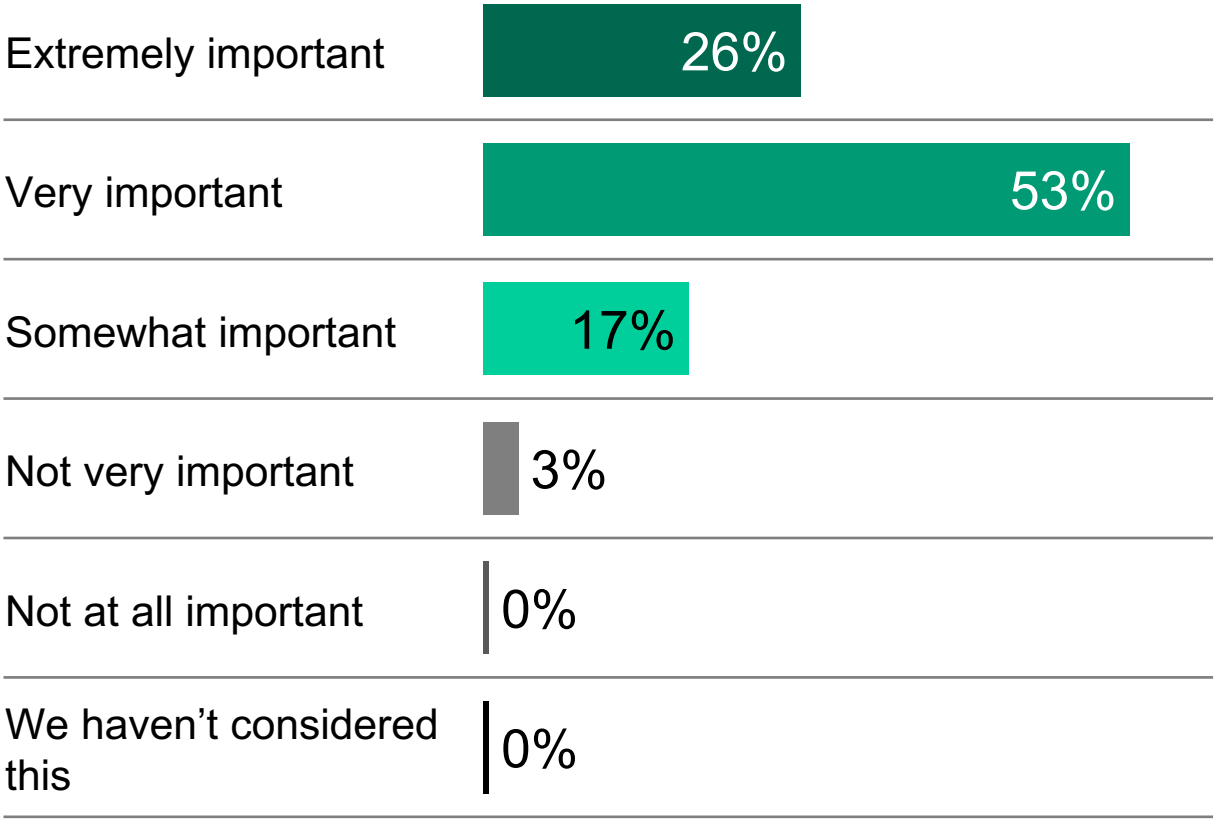


While business leadership in general seems unsure of the environmental impact of AI, most say environmental sustainability will be an important factor as they make decisions about AI adoption and scaling

Environmental Impact of AI



Importance of Environmental Sustainability



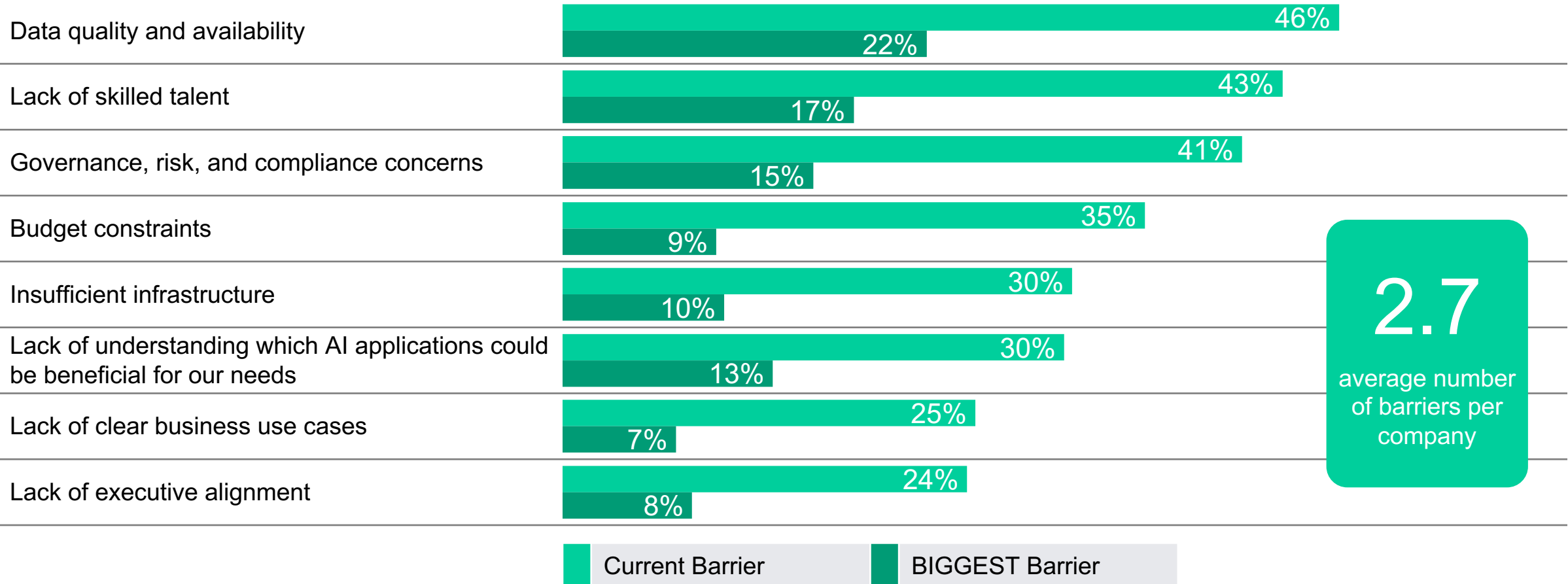
86% say it would be valuable for them to have an AI platform designed with energy-efficiency in mind

Value: This AI platform and facilities are designed with energy-efficient infrastructure, sustainable cooling systems, and low-carbon operations – such as the use of renewable energy sources like hydroelectric power – to minimize environmental impact while supporting high-performance AI workloads.



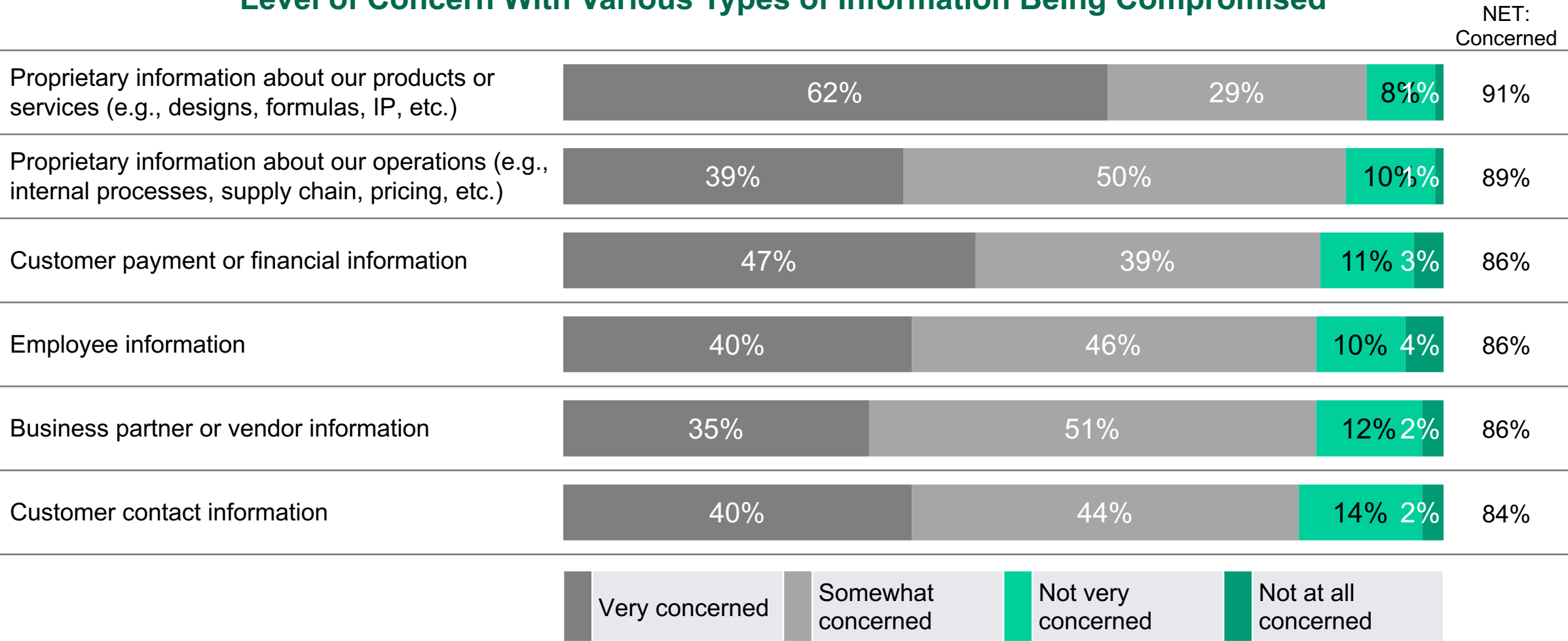
The average company is experiencing nearly three barriers to scaling AI; the most common barrier is *data quality and availability*

Current Barriers to Scaling AI



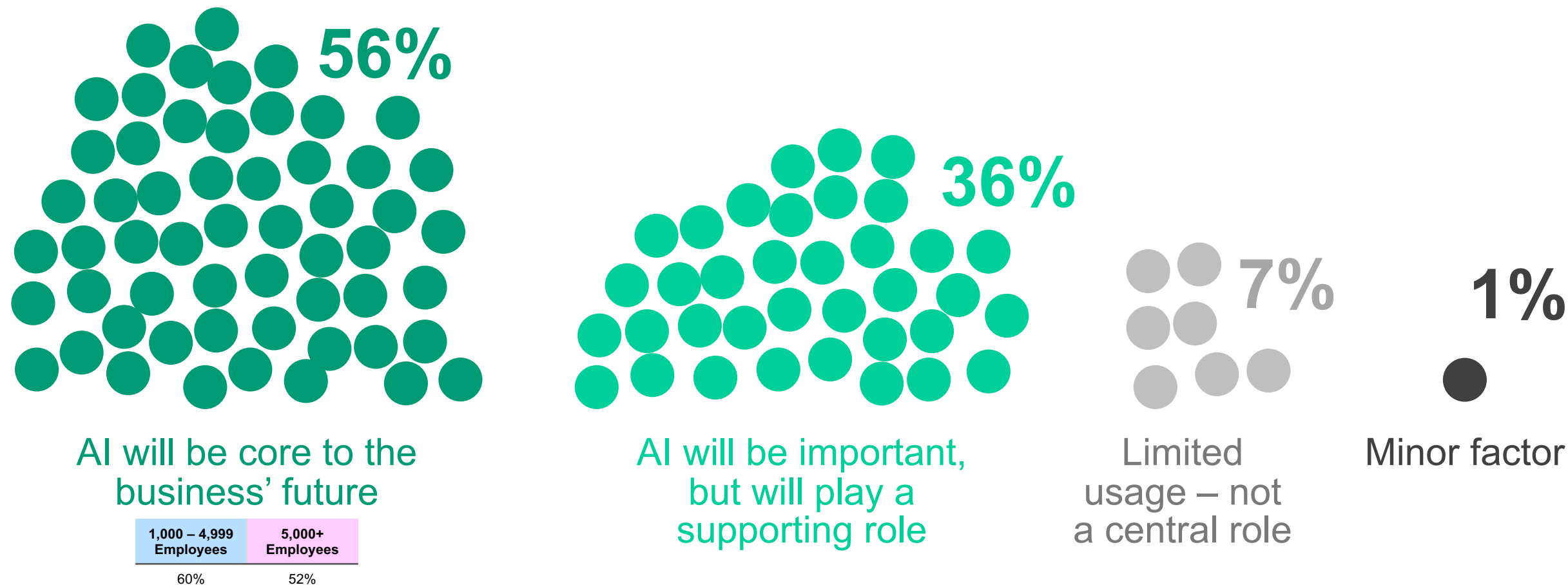
Business leaders are concerned with a variety of different data being compromised, particularly proprietary information about their products or operations

Level of Concern With Various Types of Information Being Compromised



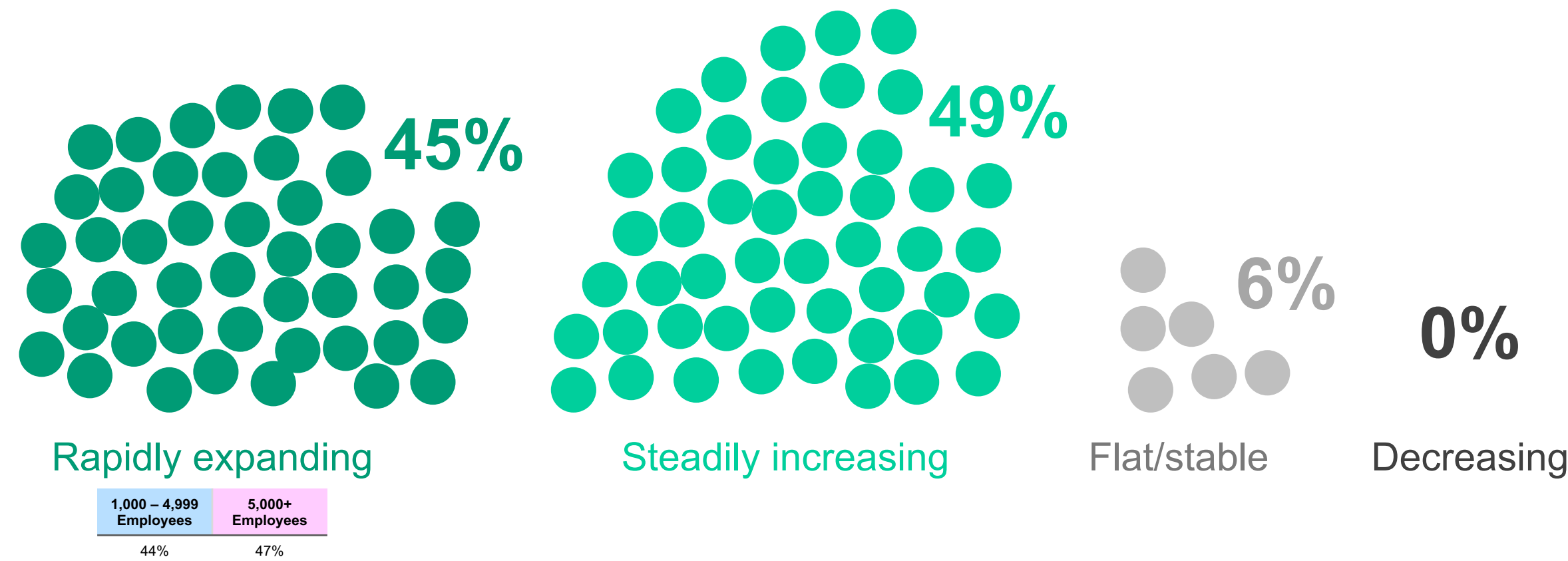
AI is projected to not only be important to businesses, but for many it will be core to the business' future; fewer than one-in-ten say they anticipate AI usage to play only a limited role in the future

Role AI Will Play in Company's Long-Term Strategies



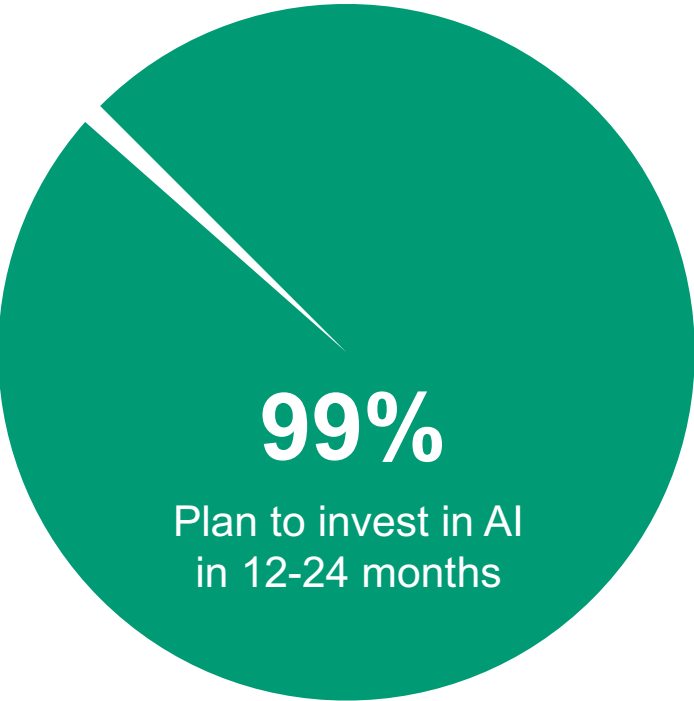
AI budgets are increasing; nearly one-half (45%) say their AI budgets are *rapidly expanding*

Trajectory of Company's AI Budget



Nearly all businesses plan to invest in AI over the next two years; two-thirds plan to invest in R&D, while six-in-ten plan to purchase/license AI, and similarly six-in-ten plan to train/upskill employees

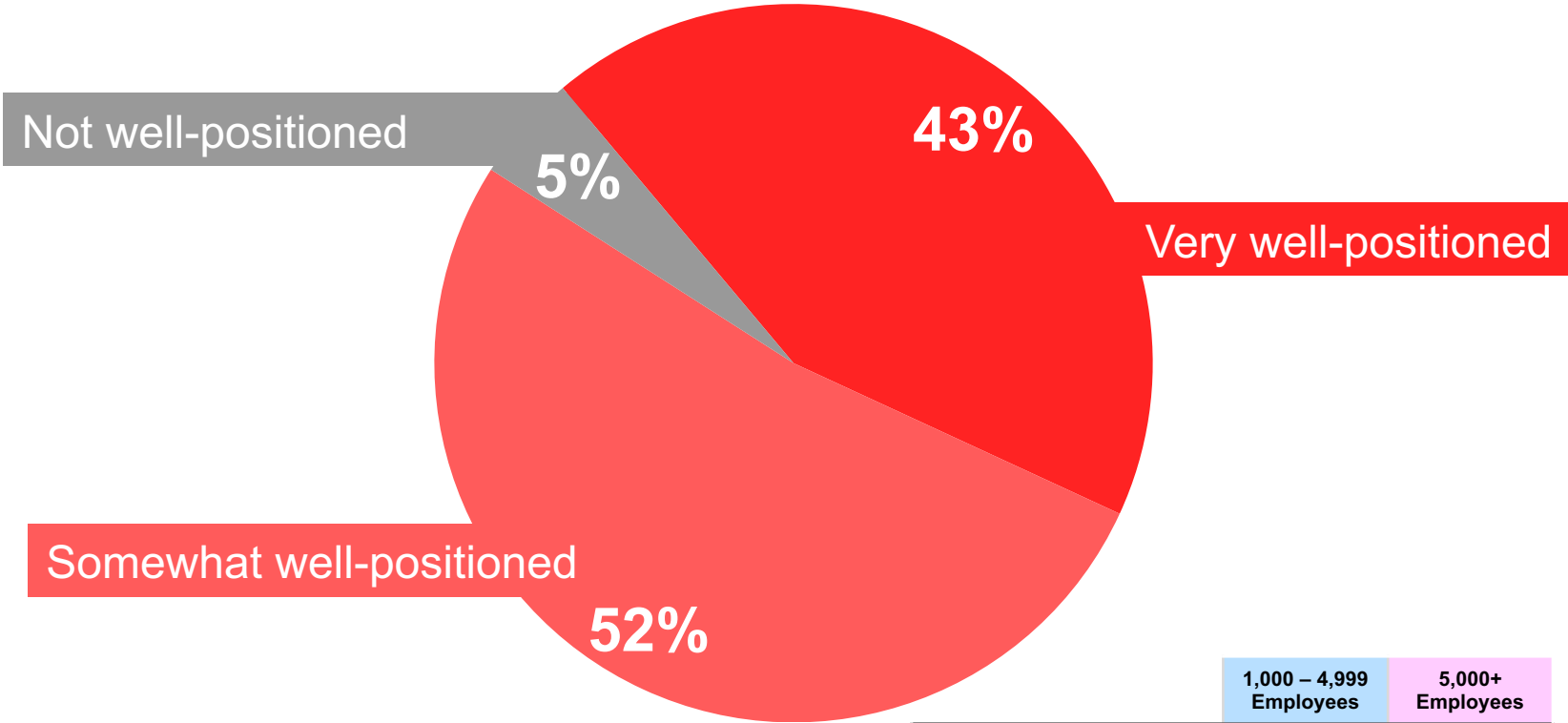
Planned Investment in AI Over the Next 12-24 Months



		1,000 – 4,999 Employees	5,000+ Employees
Increasing budget for AI R&D	67%	68%	66%
Purchasing/licensing AI platforms and tools	62%	55%	71%
Training and upskilling employees	62%	61%	63%
Expanding compute and cloud infrastructure	59%	55%	64%
Hiring AI/ML talent	48%	46%	51%
Partnering with vendors/consultancies	44%	49%	38%

The vast majority of business leaders feel Canada is well-positioned to be a global leader in AI

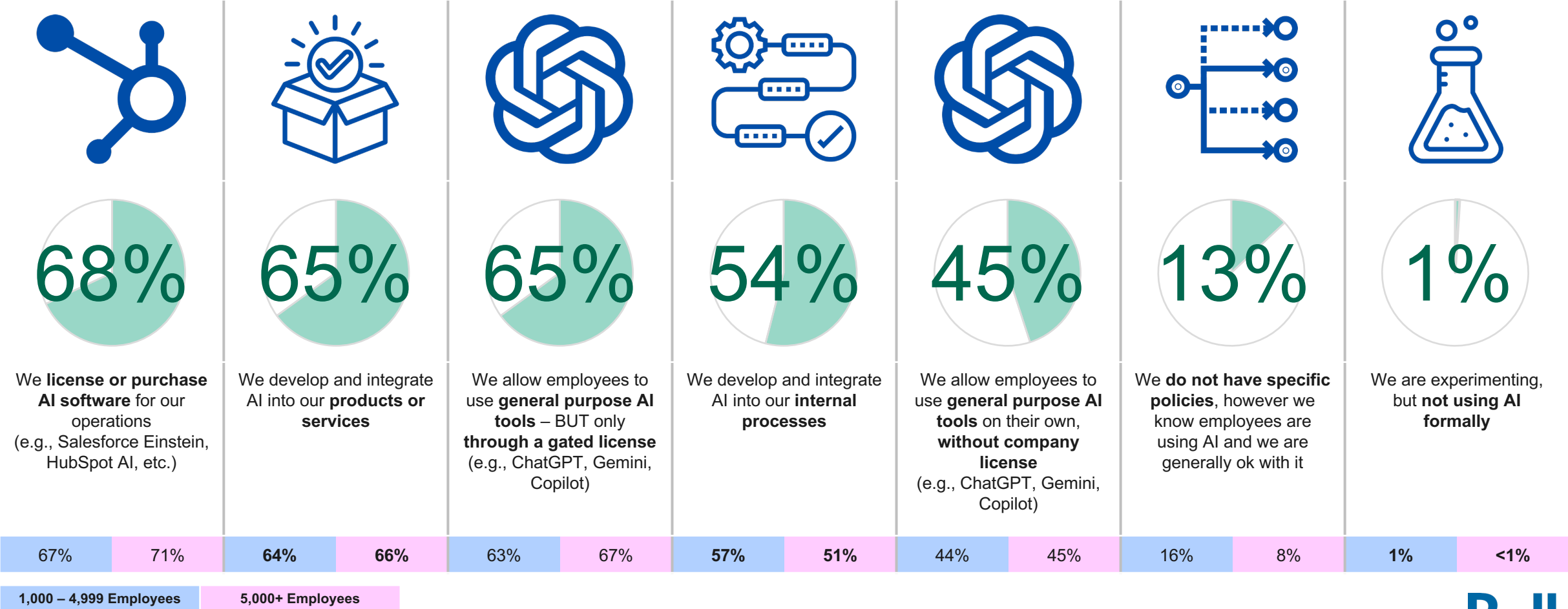
How Well-Positioned is Canada as a Global Leader in AI?



	1,000 – 4,999 Employees	5,000+ Employees
Very well-positioned	46%	39%
Somewhat well-positioned	51%	54%
Not well-positioned	3%	7%

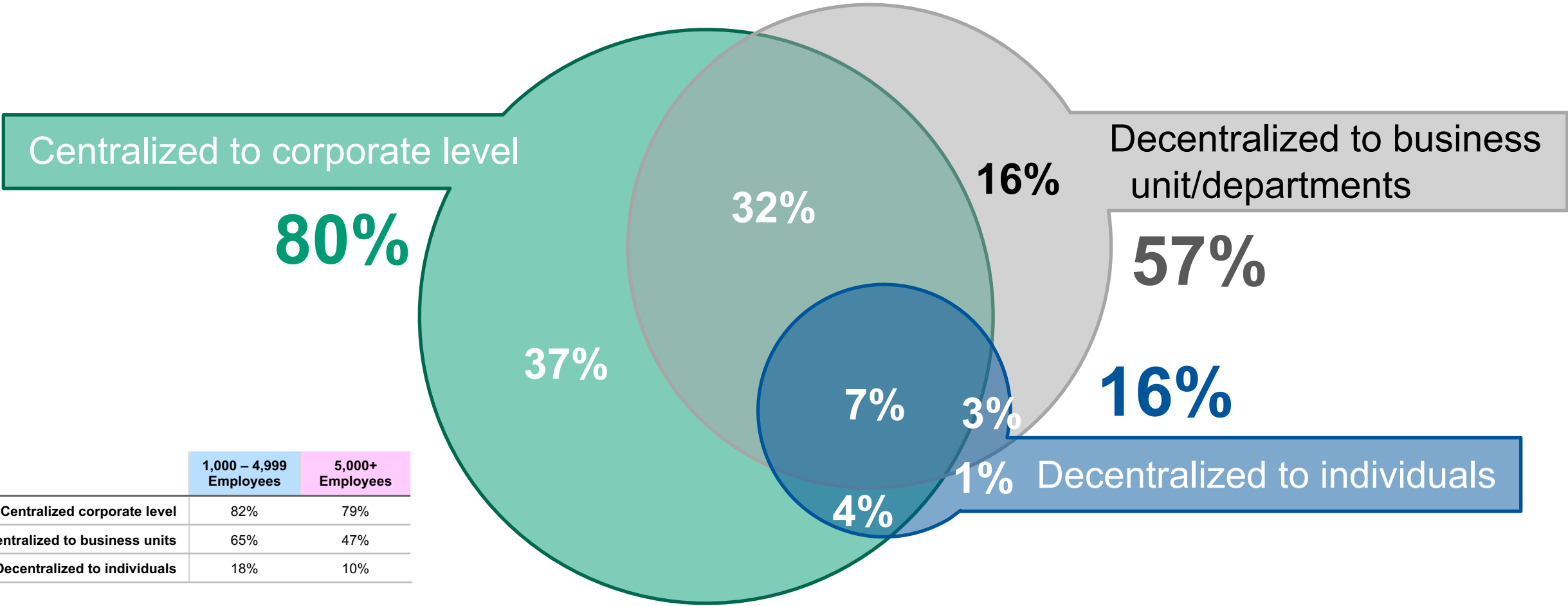
Businesses deploy AI in a variety of ways, most commonly through licenses or purchase of AI software for operations; two-thirds say they are integrating AI directly into their products or services

How Large Businesses Deploy AI



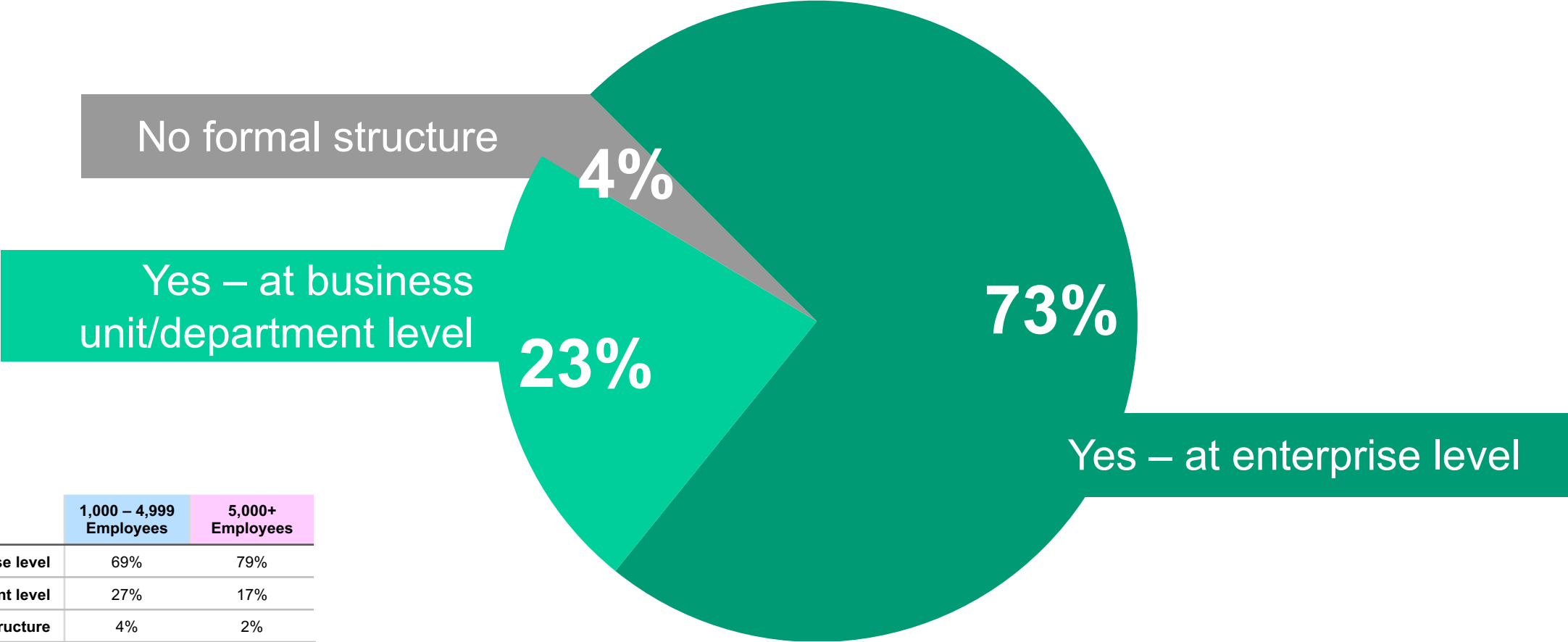
AI usage is most commonly centralized at the corporate level, however decentralization is also common; nearly half of companies (46%) deploy AI with various degrees of centralization based on the specific use cases

Centralization of AI Decision-Making



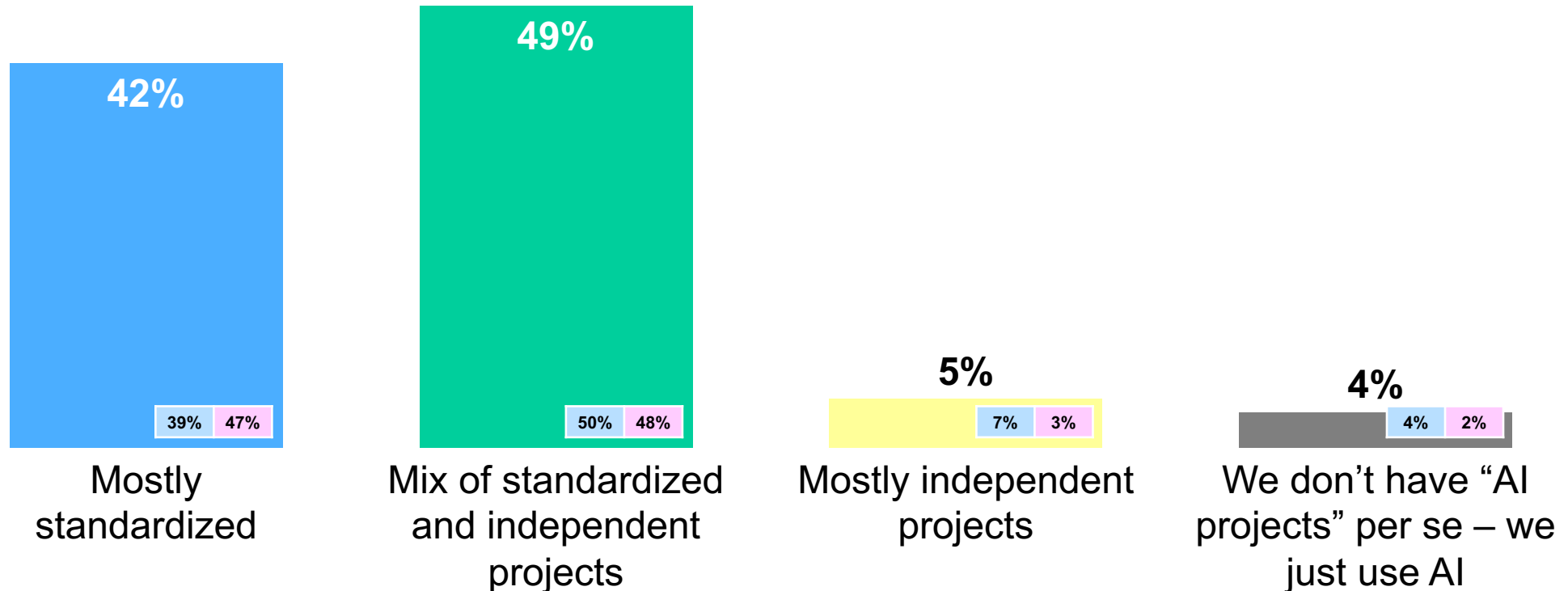
Nearly all large Canadian businesses (96%) have an AI governance structure; roughly three-quarters say this structure is at the enterprise level

Whether Has AI Governance Structure



AI projects are more commonly standardized than run independently, however roughly half of large businesses have both standardized and independently-developed AI projects

Proportion of AI Projects that are Standardized or Independently-Developed

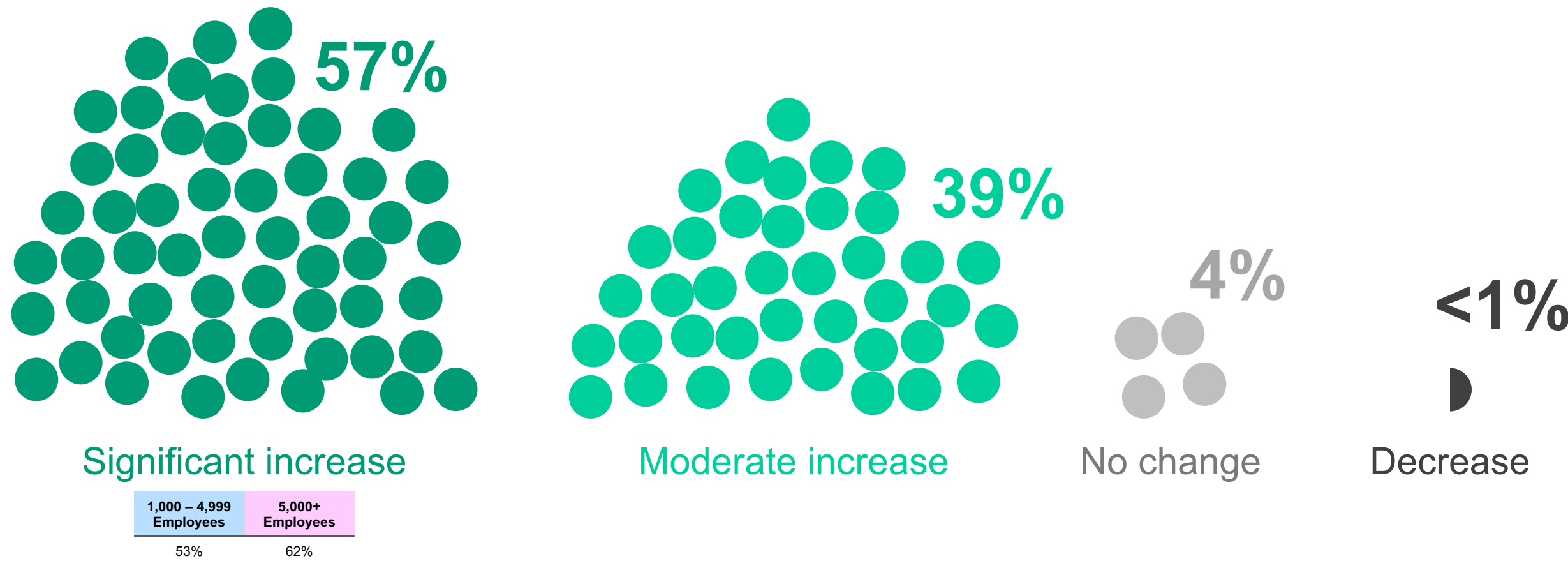


1,000 – 4,999 Employees

5,000+ Employees

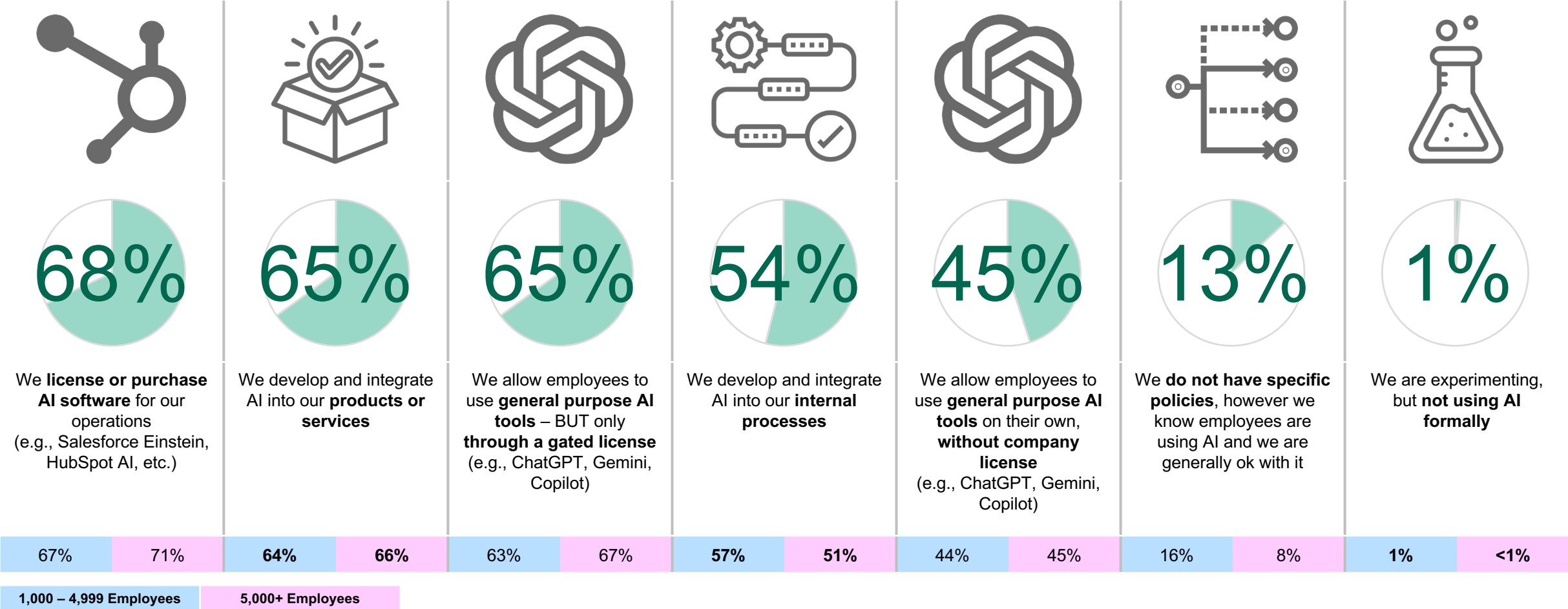
Nearly all businesses anticipate increasing their use of AI over the next three years, six-in-ten of whom say the increase will be *significant*

Anticipated Change in AI Usage Over the Next 3 Years



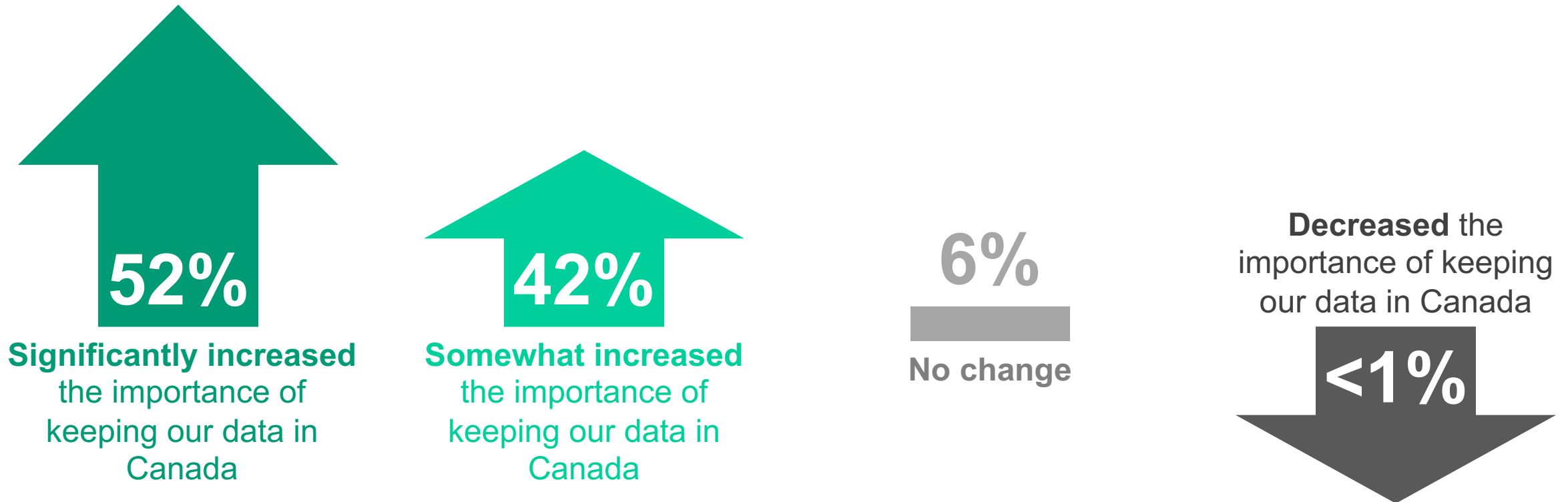
Businesses deploy AI in a variety of ways, most commonly through licenses or purchase of AI software for operations; two-thirds say they are integrating AI directly into their products or services

How Large Businesses Deploy AI



More than nine-in-ten business leaders say global and geopolitical factors have increased the importance of keeping their data in Canada

How Global & Geopolitical Factors Have Influenced the Importance of AI Data Sovereignty



Eight-in-ten say they project AI to be fully integrated into their operations within the next two years; just 2% do not have an integration timeline

Projected Timeline for Full AI Integration with Operations

		1,000 – 4,999 Employees	5,000+ Employees
Within the next year	30%	29%	33%
Within the next two years	51%	55%	46%
Within the next five years	14%	12%	16%
Within the next ten years	2%	2%	2%
More than ten years	0%	1%	0%
We do not have a timeline for this	2%	2%	2%

Just one-quarter say a good AI project idea would be approved immediately; most say there would be some delay as they assess the merits and risks of the project

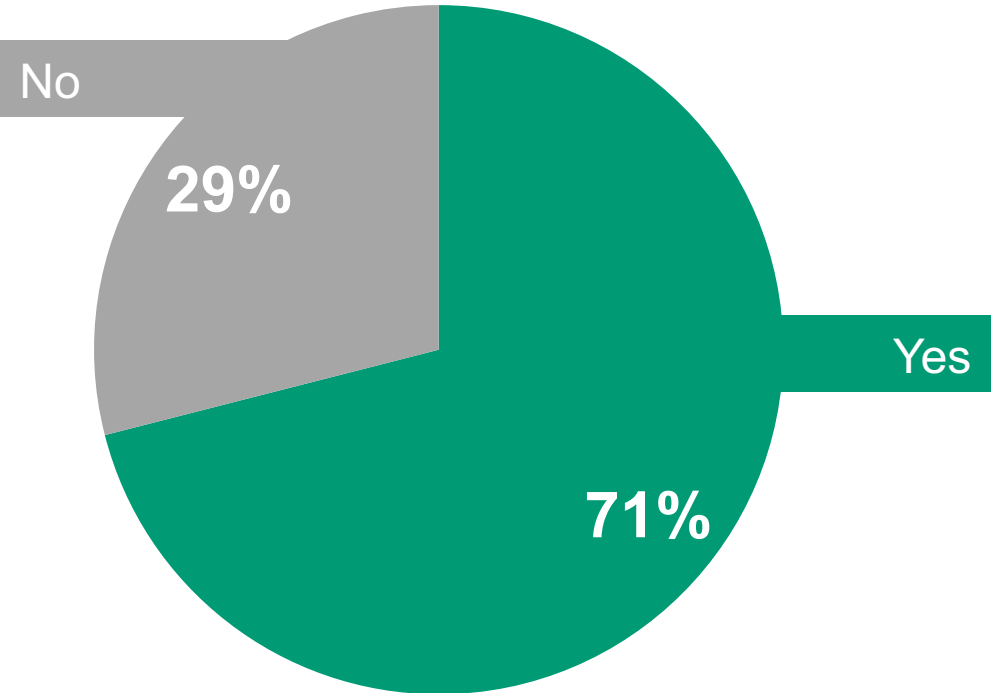
Average Timeline For AI Project Approval

		1,000 – 4,999 Employees	5,000+ Employees
If it was a good idea, it would be approved immediately	23%	22%	23%
A month or less	35%	37%	32%
Two months or less	26%	24%	29%
Six months or less	11%	9%	13%
A year or less	5%	7%	3%
More than a year	0%	0%	0%
It likely would not get approved	<1%	1%	0%

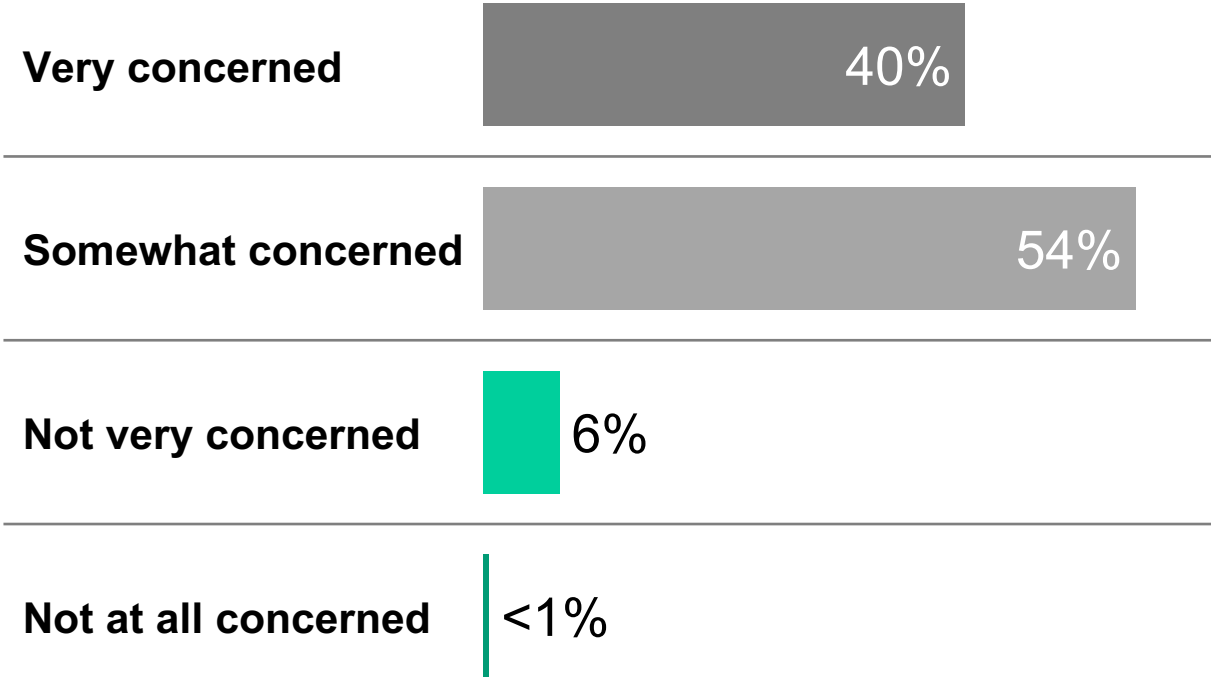
Seven-in-ten say they were aware of the CLOUD Act; more than nine-in-ten are concerned about their data, given the CLOUD Act

CLOUD Act Awareness and Concern

Awareness of CLOUD Act Before Today



Concern About Data After Reading CLOUD Act



Business leaders are concerned with a variety of different data being compromised, particularly proprietary information about their products or operations

Level of Concern With Various Types of Information Being Compromised

