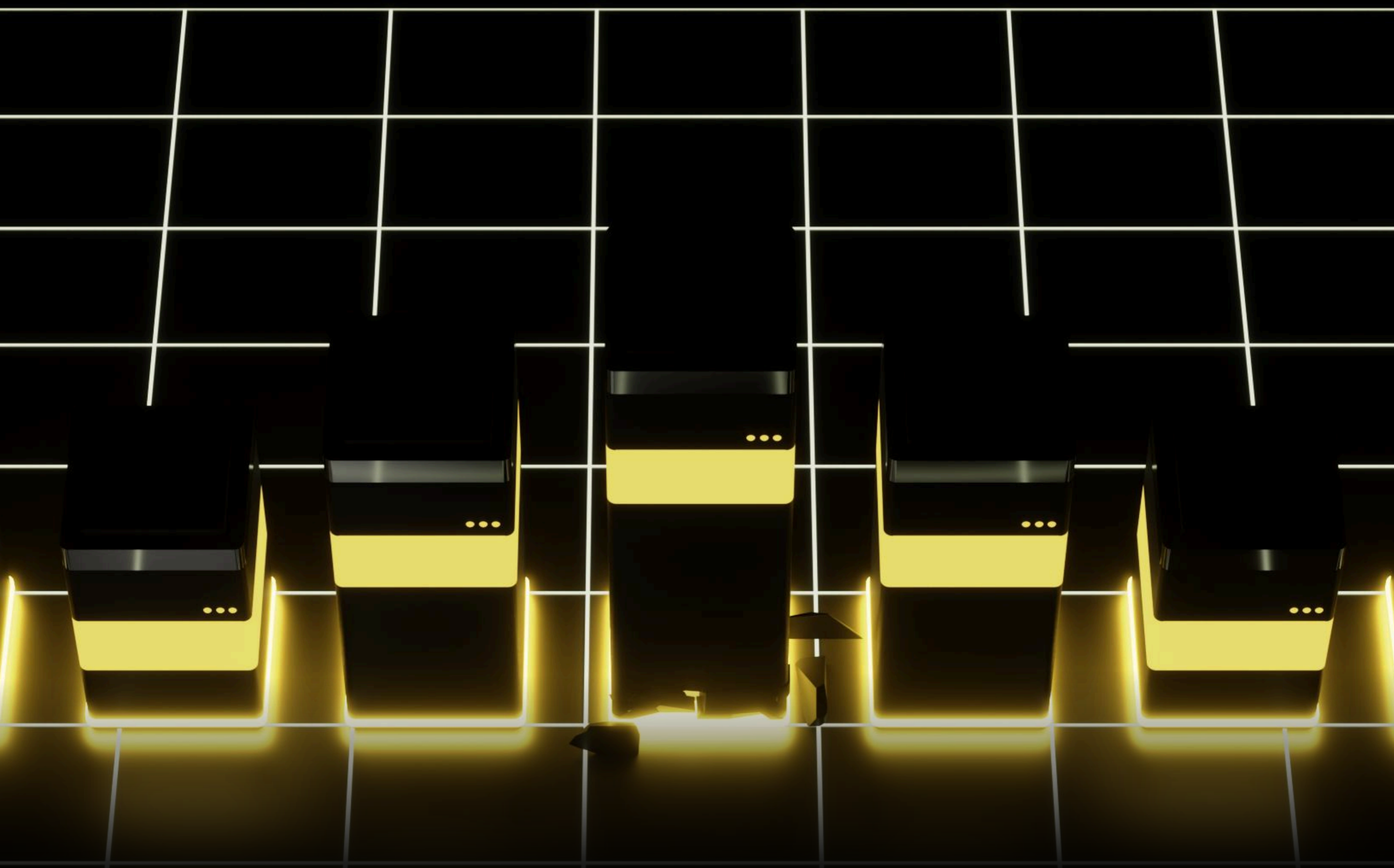


WHAT THE EARLY DATA SHOWS

The AI Production Paradox

The problem isn't your AI.
It's your comms infrastructure.




Early findings from 581 enterprise decision-makers across EMEA, part of a global independent survey of 2,527 customer communication leaders across 10 countries and 6 industries.


The finding that changes the conversation

Getting out of pilot purgatory was supposed to be the hardest part. Our data shows it wasn't.


In customer communications, 62% of organizations globally are already in production. Nine in ten expect to be there by the end of the year. What happens next is not what the market expected.


Top global findings

 **Pilot purgatory is over**
62% of enterprises already have AI communications agents in production. 88% will be deployed within 12 months.


 **Production is where the real story starts**
74% of enterprises that deployed AI in customer communications have been forced to roll back. Among those with fully mature guardrails, the rate is 81%.


 **Confidence doesn't correlate with fewer failures**
90% of enterprise decision-makers describe themselves as confident in their AI agent readiness. Of those, 75% have experienced at least one governance rollback.


 **The real impact of AI failures hits three places at once**
When an AI agent fails in production, the cost lands in the support queue, the brand, and the engineering backlog. Most organizations are only tracking the first.


 **Infrastructure is where the race gets decided**
Infrastructure satisfaction is the single strongest predictor of AI deployment success across every variable analyzed, but most organizations say their current provider falls short in at least one area.


The reality in EMEA

 **EMEA is slower to get to production than other regions, but the pipeline is full**
55% of EMEA organizations already have an AI customer communications agent in production and 84% are planning to be live within 12 months. The enterprises with the most mature governance are also the furthest along in AI deployment.

 **Investment intent is unanimous across regions**
96% of European respondents plan to increase spend on AI customer communications, with 84% of European enterprises planning double-digit investment increases.

 **Europe's governance-first approach reduces AI incidents**
In EMEA, 31% of decision makers ranking AI guardrails as their top trust requirement. Still, 70% of European organizations have had to roll something back. Data leaks are the leading cause (26%), yet that's 5 points below the global average. GDPR discipline and privacy-by-design policies appear to prevent incidents, not just delay them.

 **EMEA has high conviction on infrastructure importance but has higher standards when it comes to provider satisfaction**
80% rate high-performing communications infrastructure as essential or very important, but EMEA still trails the global average on all six infrastructure dimensions analyzed.

 **The provider evaluation wave hasn't hit yet but is coming in 2026**
78% of European organizations have had active or exploratory conversations with alternative providers. The region trails behind global on active evaluation but leads on planned evaluation over the next 12 months (14% vs. 9%).

Pilot purgatory is over

For two years, the dominant story in enterprise AI has been about being stuck. But for AI in customer communications, that story is no longer true. The debate about whether to deploy is over.

Across Europe, more than half of enterprises already have AI agents in production (55%, seven points below the global average of 62%). 84% expect to have an AI agent live by the end of the year.

Enterprises globally are deploying AI across an average of 3.3 channels simultaneously, with nearly half running AI across four or more. In EMEA, the main channels are email (64%), web chatbot (62%), social media (47%), SMS/MMS (45%), WhatsApp (42%), and voice and IVR (36%).

For 33% of European enterprises, the primary goal is improving customer satisfaction and loyalty – the single most cited primary outcome, ahead of revenue growth at 23%.



55%

of European organizations already have AI agents in production.

84%

of enterprises in EMEA plan to be in production in the next 12 months.

96%

in EMEA plan to increase AI communications investment in 2026.

Production is where the real story starts

All along, the market has been drawing the wrong finish line. We thought getting to production was the hardest part. The data shows it isn't.

In Europe, 70% of enterprises have been forced to shut down or roll back a deployed AI communications agent – 4 points below the global average of 74%.

And that number doesn't decline with experience. Sinch data shows that, among organizations with fully mature guardrails, the rollback rate is higher still. More governance, more monitoring, more investment – and still, the most advanced programs have had to shut something down.

What's triggering the rollbacks: PII or customer data exposure is the leading cause, cited by 26% of European organizations. The regional result is 5 points below the global average of 31%. By countries, France sees higher than average rollbacks due to data leaks (42%), while in Germany (19%) and the UK (20%) these are significantly lower.

Other common reasons for rolling back agents are hallucinations (22%) and lack of auditability (16%). These aren't abstract risk categories. When 16% of leaders in EMEA say their rollbacks can't be fully diagnosed because there's no audit trail, the organization is left with a failure it can't learn from and no way to prove it's been fixed.

90%

of French organizations have had to shut down or roll back an AI agent – 42% of those due to data leaks.

38%

of enterprise leaders in the UK report no rollbacks – the most stable market in the region.

The real cost of governance failures

These rollbacks don't happen quietly. When an AI communications agent fails in production, customers notice. Our data shows the impact splits in three directions: the support queue, the brand perception, and the engineering cost.

In EMEA, respondents cite reputational damage to the brand as the biggest impact of AI agent failure at 34%, followed by increase in the support queue at 33%.

And when an agent gets rolled back, the engineering team goes back with it – diagnosing, rebuilding, re-deploying. Our research shows 78% of AI engineering teams in Europe report spending at least half their time building guardrails and safety controls, even before a single failure occurs.

Main business impact of AI agent failure:

34%

of European organizations cite reputational damage to the brand.

33%

of European organizations cite impact to the support queue.

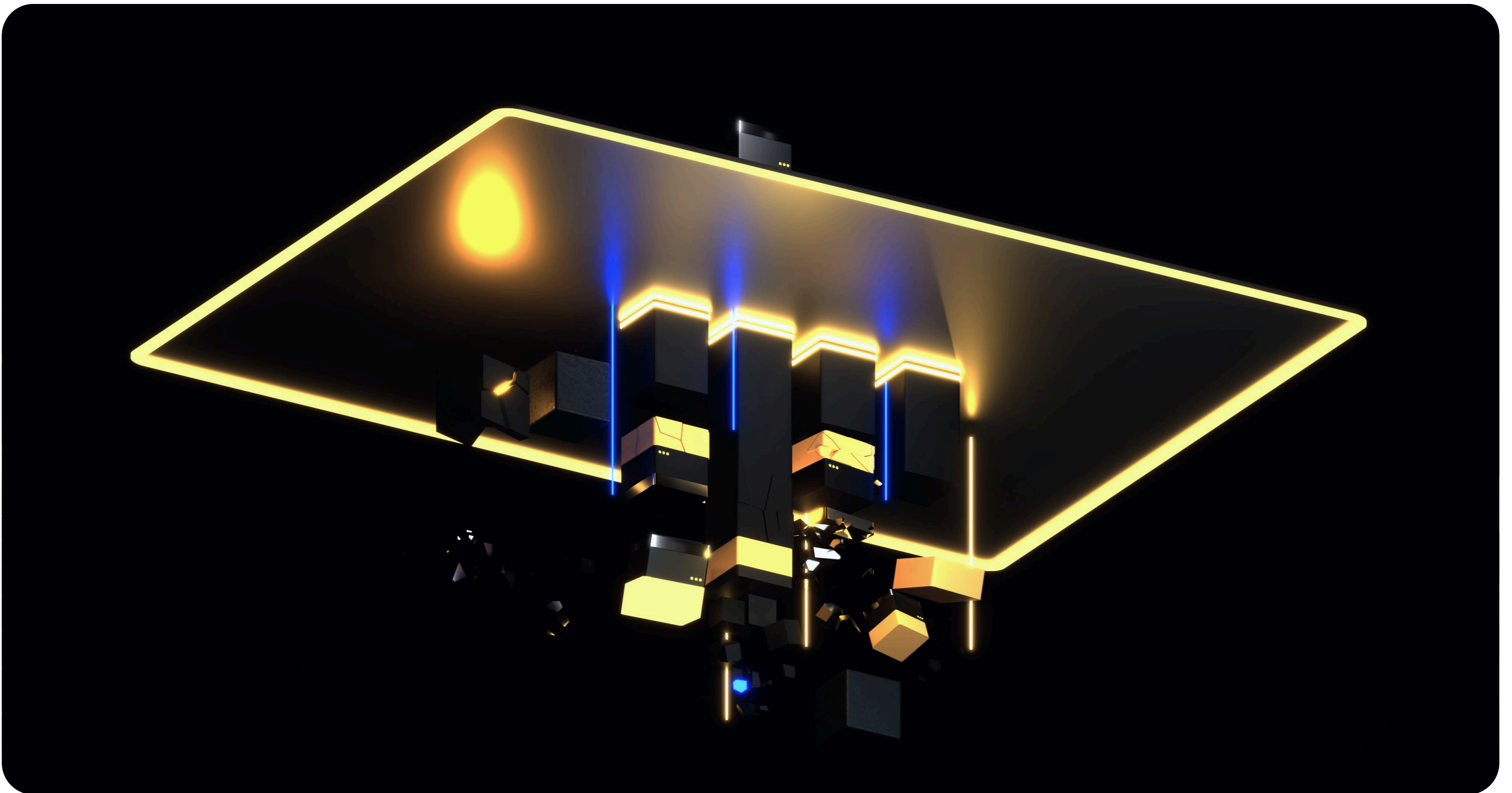
78%

of engineering teams in EMEA spend at least half their time building safety measures.



When you have to roll something back, it costs more than just the time it takes to roll it back. These are real people, real customers. And if you're deploying an AI agent into production that is just confidently wrong, confidently making mistakes, that's going to really impact your brand's value. Not to mention the experience that your customers are having. They may never come back. That's a real cost.

Daniel Morris
CPO at Sinch



Infrastructure is where the race gets decided

Sinch's global data shows that infrastructure satisfaction is the strongest predictor of AI deployment success across every variable analyzed.

In Europe, 80% of organizations rate high-performing infrastructure as essential or very important, but the region shows lower satisfaction with their current provider on every infrastructure dimension explored in the research. EMEA trails the global average by 4 to 7 points across all six measures analyzed, with the widest gaps showing in deployment speed, visibility and analytics, and security and compliance. This gap is widest in Germany, where deployment speed satisfaction sits at 67%, 13 points below the global average.

Across countries, satisfaction also varies. 16% of respondents in the UK report no significant gaps in their current providers, while in France that number decreases to 6%.

Enterprises – globally and in EMEA – are evaluating their current providers. 78% of European organizations have had active or exploratory conversations with alternative providers in the past 12 months. The region trails in active evaluation by 9 points but leads on planned evaluation (14% in EMEA vs. 9% globally), suggesting a wave of provider evaluation coming in late 2026.

The market isn't shopping because it's unhappy with a vendor. It's shopping because AI ambitions have outgrown what the current infrastructure was built to handle.

80%

of European organizations rate high-performing infrastructure as essential or very important.

40%

of European respondents report insufficient reliability for AI at scale from their current provider.

78%

of organizations in EMEA have had active or exploratory conversations with alternative providers.



Get even more findings

The AI Production Paradox early findings report is already live, and the full report – including vertical, regional, and persona insights – is coming in June.

Explore the global data and discover why more investment isn't closing the governance gap.

[Read the report](#)

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