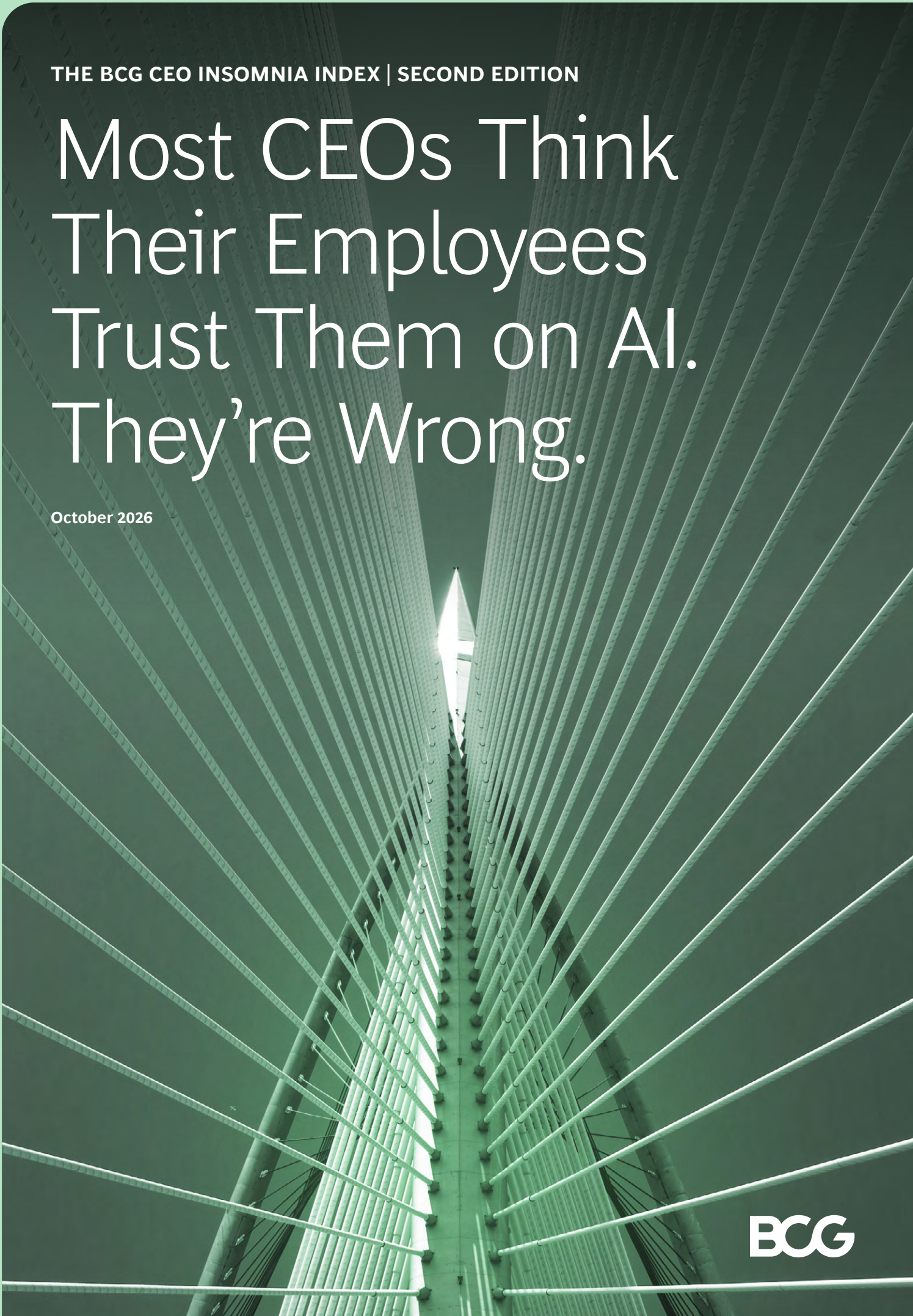
THE BCG CEO INSOMNIA INDEX | SECOND EDITION

Most CEOs Think Their Employees Trust Them on AI. They're Wrong.

October 2026



BCG



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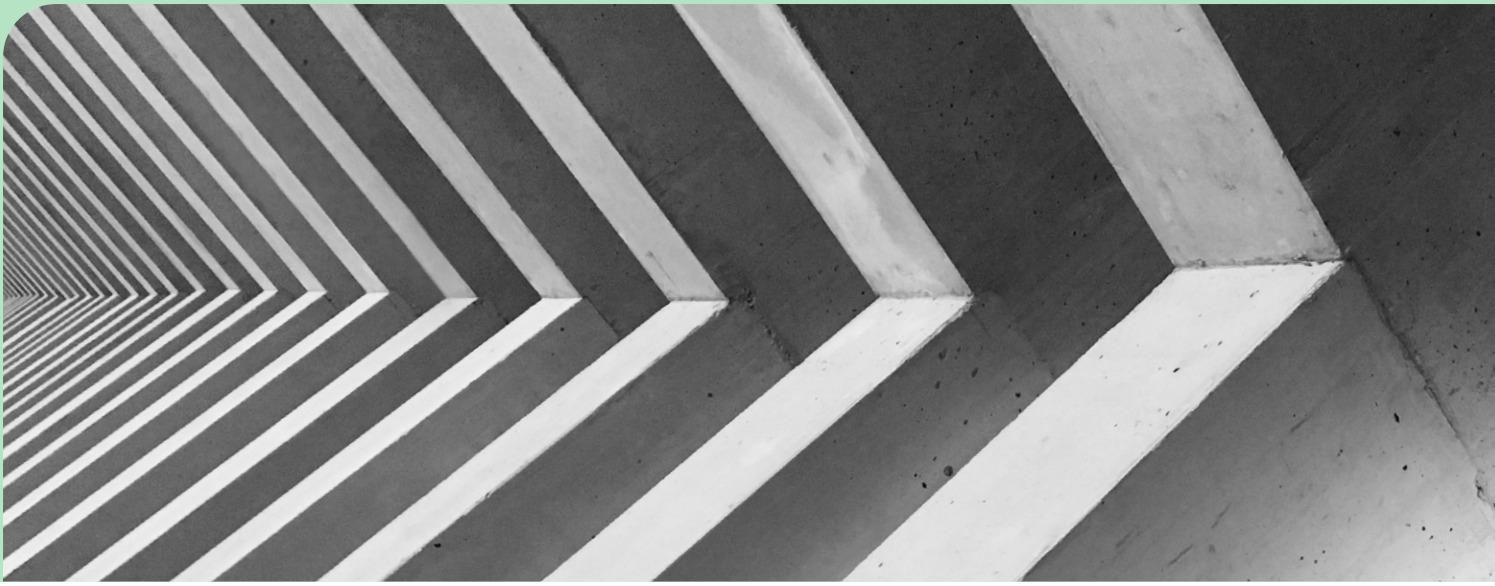
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Executive Summary

Ambition may belong to CEOs, but the ability to realize it belongs to their employees. Rarely has that bargain mattered more than today. As leaders across industries seek to reinvent their businesses with AI, success will depend in no small part on whether employees trust them enough to embrace the change. And right now, many chief executives are vastly overestimating just how much trust their employees place in them.

Nearly 90% of CEOs say they are confident or very confident that their employees trust their leadership. But only 46% of employees agree, according to the second edition of the BCG CEO Insomnia Index.

The disconnect is happening at a time when CEOs are feeling less stressed overall, with AI ranking in the bottom half of 12 major factors keeping them up at night. But ask employees how their CEO approaches AI, workforce transitions, and employee well-being, and the trust calculus leaders are banking on collapses.

- Only 15% of CEOs are concerned that their approach to AI transformation could erode employee trust. But 40% of employees say their CEO has not been transparent enough about AI's impact on their roles and career opportunities.

- Nearly 70% of CEOs are confident that their employees trust them to prioritize their well-being when deciding how to fund critical business priorities. But only 36% of employees agree.

When asked to elaborate on specific CEO behaviors, employee comments strongly suggest that they are experiencing AI as something being done to them, rather than with them. One, for example, said their CEO keeps "gushing about AI and how it could increase profits at the expense of our jobs."

Employee perceptions of their CEO's AI stewardship sharply coincide with how willing they are to put in extra effort at work.

- 50% of employees who say their CEO's approach to AI has increased their trust are more willing to go above and beyond at work than they were three months ago. But among those who say their CEO's leadership and communication on AI have eroded their trust, fewer than 10% are willing to go the extra mile.

That difference gives CEOs plenty of reason to pay attention to growing employee discontent. But nearly 60% say they are unconcerned by rising levels of employee disgruntlement. When asked why, many leaders said they believe they are already doing enough to keep employees satisfied.

This suggests that many CEOs are misjudging what "enough" now requires. Whereas earlier technologies automated discrete tasks that make up knowledge work, AI agents increasingly perform the lower-level knowledge work itself. BCG experts caution that without proper training and a clear picture of how AI will change their jobs, employees may fear they're becoming dispensable.

Overcoming those fears will require greater visibility, communication, and engagement from CEOs. But it's falling at a time when their attention has never been at a greater premium.

As noted in our inaugural Insomnia Index, near-term pressures are squeezing CEO bandwidth, and our latest surveys confirm that the problem is getting worse:

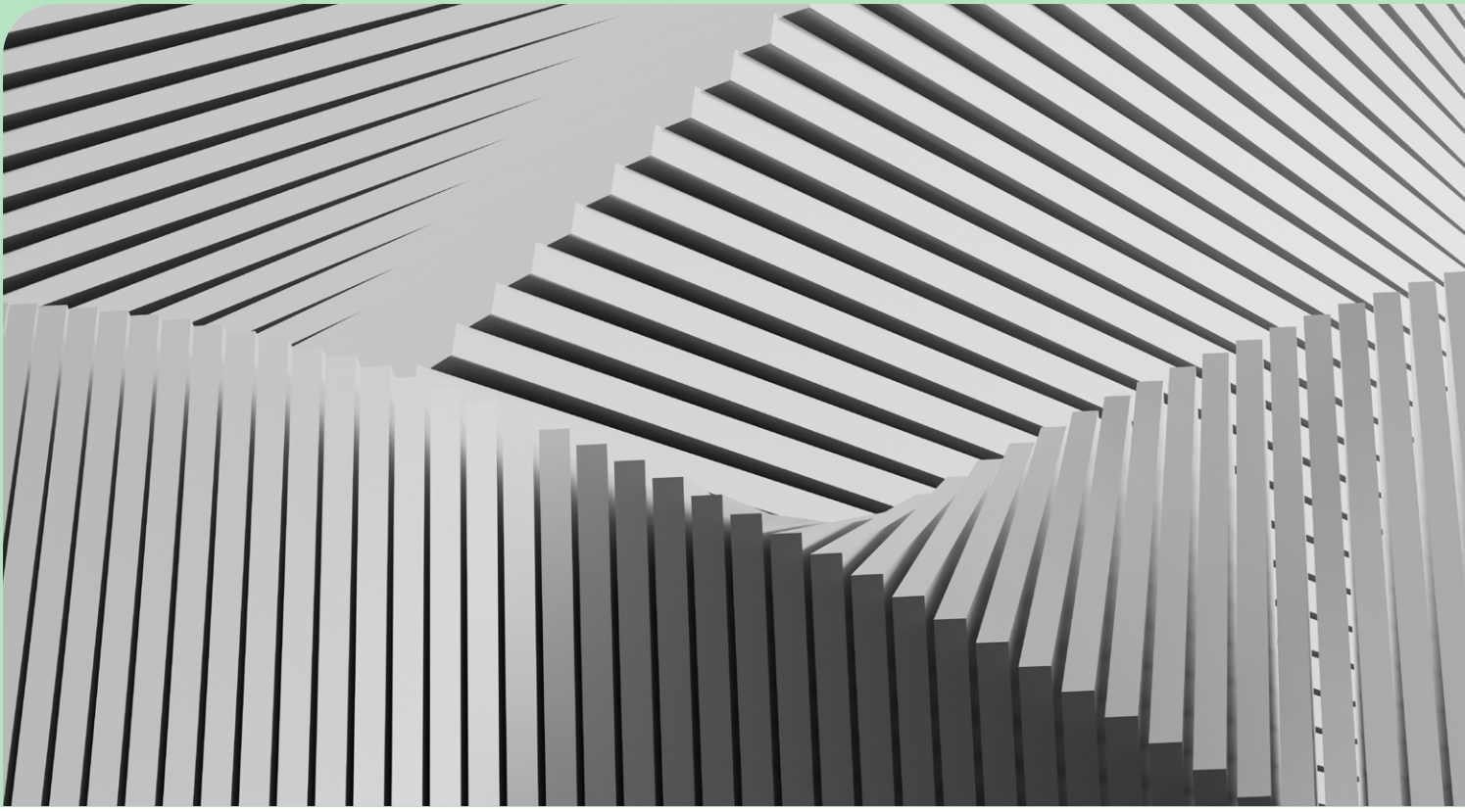
- 60% of CEOs say near-term pressures consume a disproportionate share of their time, a 3-percentage-point increase from our inaugural survey. Among leaders of the largest companies in our study, that figure rises to 68%.

- Only 63% of CEOs are confident their senior leadership teams can execute their vision over the next two to four quarters, putting more of the onus for execution on CEOs.

- Nearly 60% of CEOs plan to replace a member of their senior team in the next six months, with CFOs topping the turnover list.

Relations with employees are not the only casualty of this leadership bottleneck. Nearly half of CEOs say they often or very often put off activities that support their physical and mental well-being. And just over a third (34%) say they have considered stepping down at some point in the past six months, a figure that jumps to over 40% among CEOs of the largest companies in our study.

The full report that follows, based on global surveys of 645 CEOs and 500 nonexecutive employees, and our CEO Job Security Model, explores our findings in greater detail. (See **Methodology**.) It also outlines practical actions CEOs can take to better manage near-term pressures, foster greater trust with employees, and lead AI transformations that leave people feeling empowered by change rather than threatened by it.



CEO Stress Dashboard



64.2

Previous score: 66.7

Q: *During the past quarter, how would you rate your overall level of job-related stress, with '0' meaning no stress and '100' meaning extreme stress?*

Source: BCG CEO Insomnia Index Survey, June–July 2026 (n = 645).

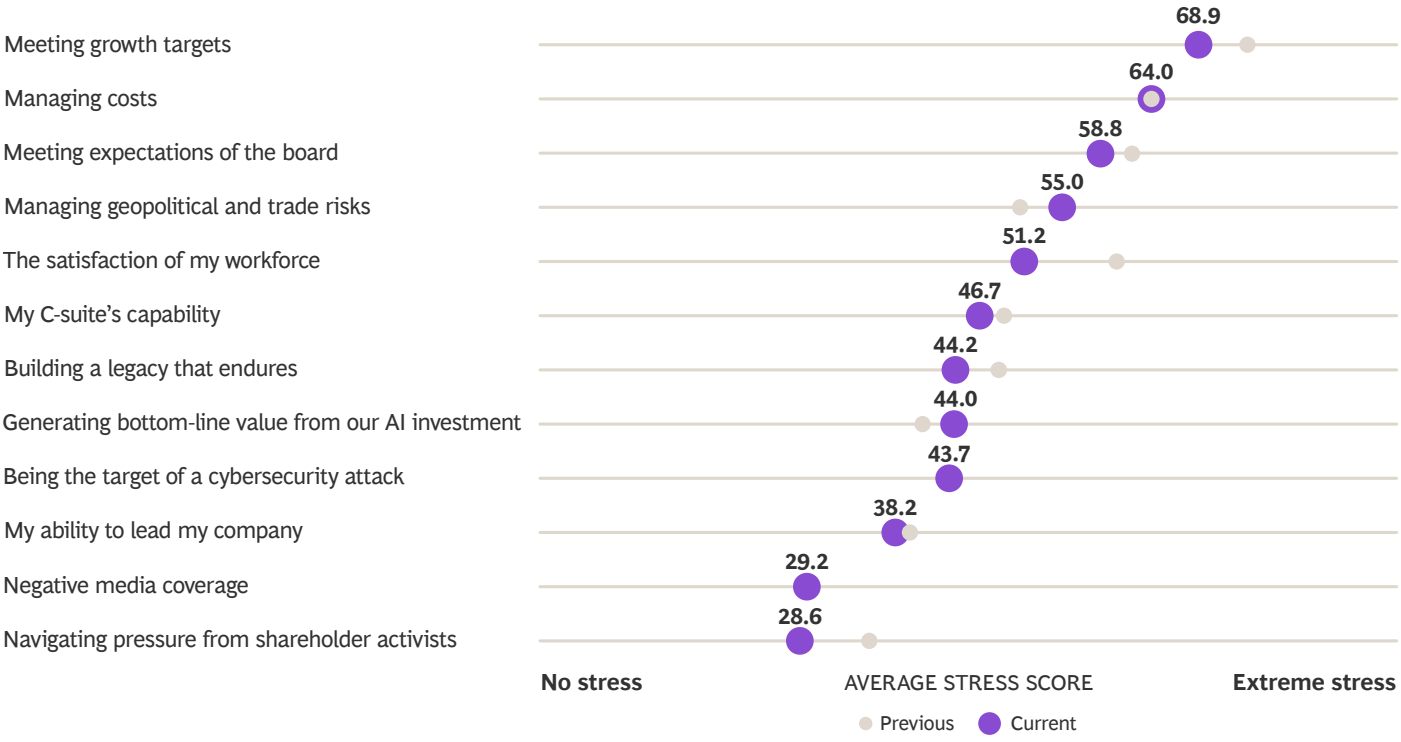
The CEO Stress Dashboard provides an overview of current stress levels, their key drivers, and how they have changed since the previous survey.

The current reading is 64.2 out of 100, down from 66.7 in our inaugural index, indicating moderate perceived stress. (See left for Stress Meter.) Mean scores for the top stressors and stakeholders also declined from the previous survey. (See **Exhibit 1** and **Exhibit 2**.)

EXHIBIT 1

The Sources of CEO Stress

What do you anticipate will be the most stressful part of being a CEO in the next six months?

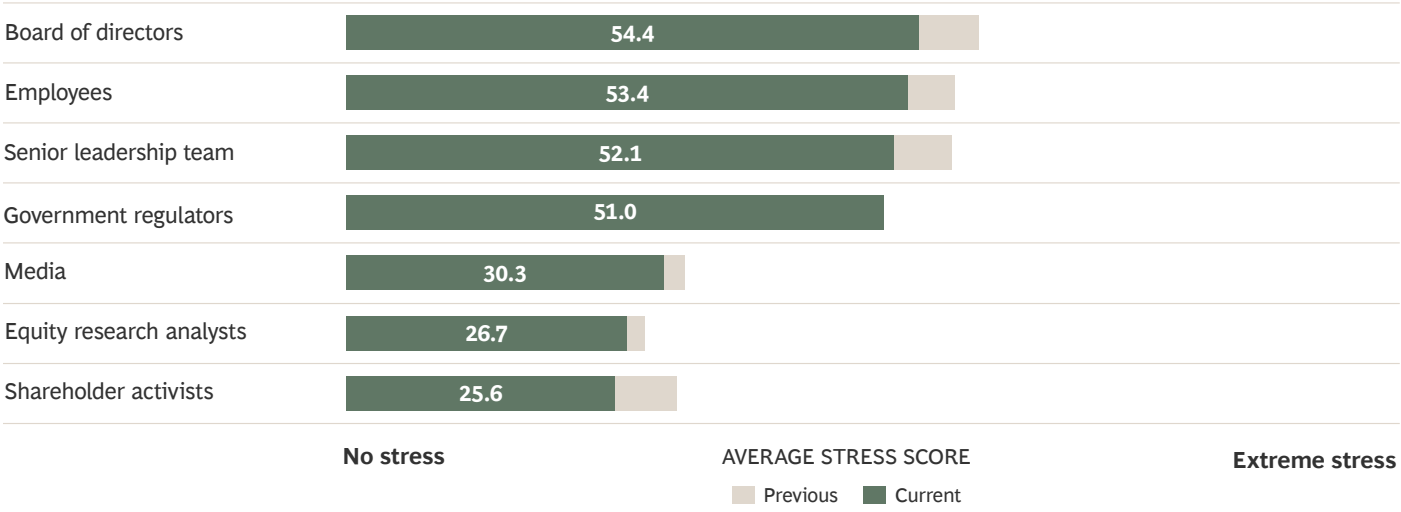


Source: BCG CEO Insomnia Index Survey, June–July 2026 (n = 645).
Note: Participants were asked to rate each factor in terms of how much stress they predicted each element would cause them, with '0' being no stress at all and '100' being extreme stress. This edition added "Being the target of a cybersecurity attack" as a new stressor, and amended "Maintaining my reputation" to be "Negative media coverage."

EXHIBIT 2

Leaders Face Scrutiny from a Diverse Set of Stakeholders

Rate each stakeholder in terms of how much stress they have caused you in the previous quarter



Source: BCG CEO Insomnia Index Survey, June–July 2026 (n = 645).
Note: Participants were asked to rate each stakeholder in terms of how much stress they caused in the previous quarter, with '0' being no stress at all and '100' being extreme stress. This edition added "Government regulators" as a new stakeholder group and removed "Social and environmental activists."



CEOs Overestimate How Much Employees Trust Them

Trust is the essential link between a CEO's ambition and employees' willingness to deliver on it.

That matters more than ever as CEOs lead AI transformations that could determine their companies' competitiveness for years, if not decades to come. But the data suggest that many are seriously misreading where they stand with employees.

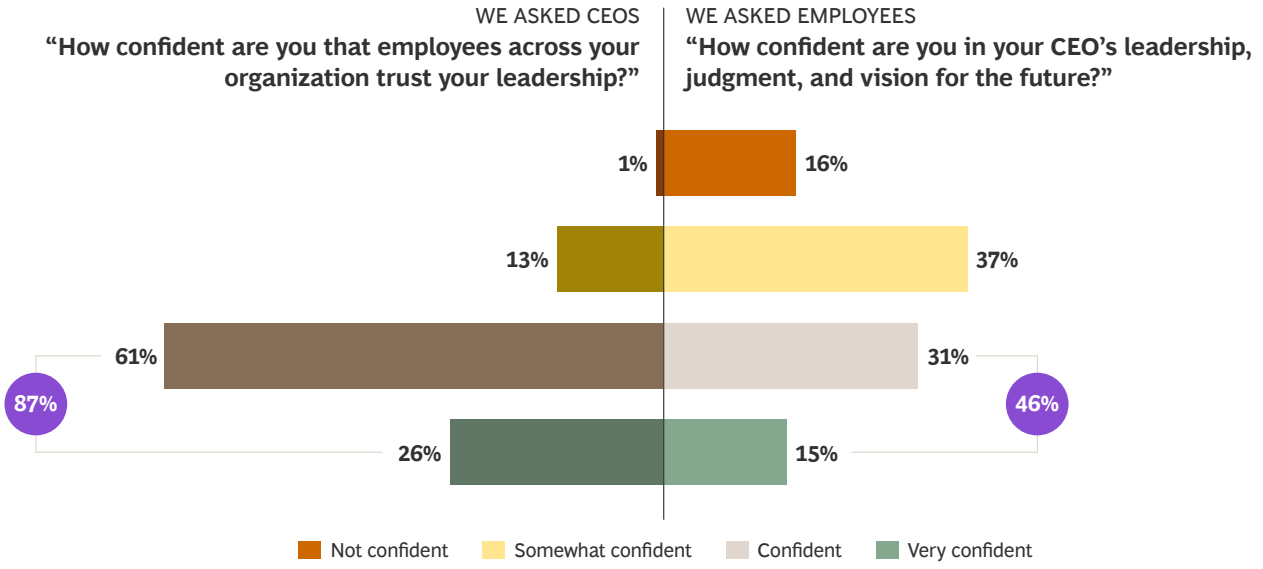
Nearly 90% of CEOs are confident that their employees trust their leadership. But only 46% of employees are confident in their CEO's leadership, judgment, and vision. (See **Exhibit 3**.)

"Historically, there's always been this perception gap," says Julie Bedard, BCG managing director and partner, and a member of the firm's global AI leadership team. "Leadership teams, including CEOs, sometimes overestimate this type of trust, and I think it has only increased as the relationship between employer and employee becomes more transactional in some companies."

The trust perception gap extends to one of the most personal dimensions of the employee experience: well-being. Nearly 70% of CEOs are confident that employees trust them to prioritize their well-being when funding critical business priorities. Only 36% of employees agree. (See **Exhibit 4**.)

EXHIBIT 3

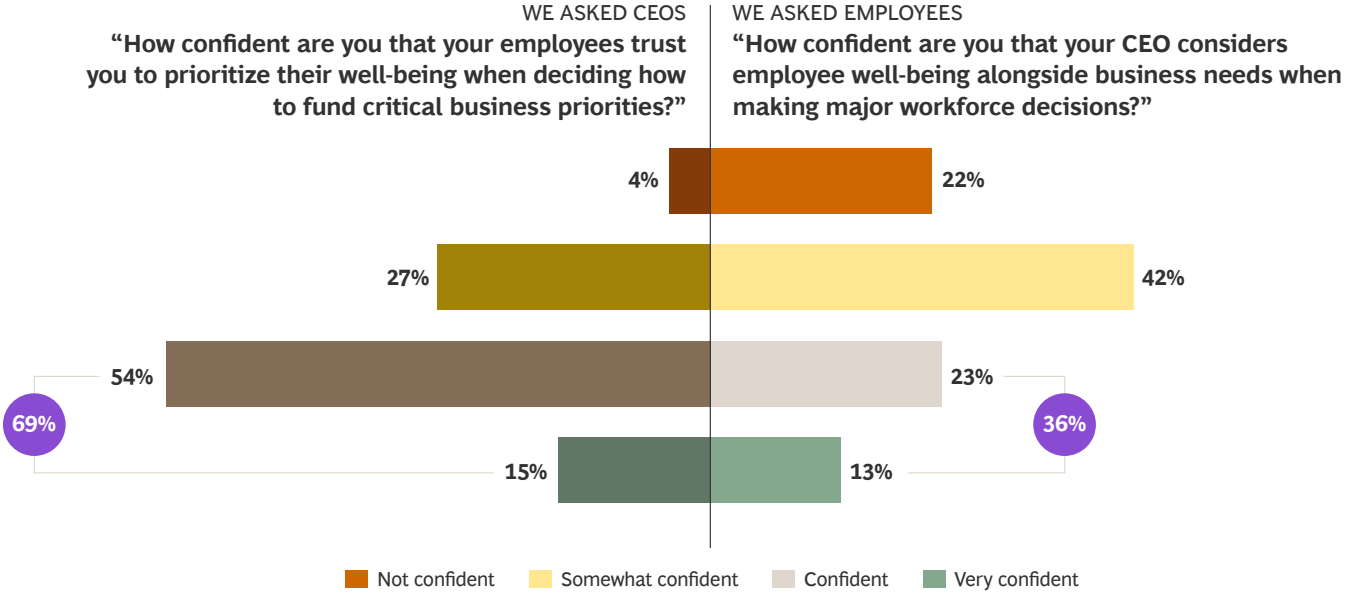
The CEO and Employee Perception Gap



Source: BCG Insomnia Index, June–July 2026 (n = 645) and BCG Insomnia Index Employee Counterview (n = 500).

EXHIBIT 4

The CEO and Employee Well-Being Trust Perception Gap



Source: BCG Insomnia Index, June–July 2026 (n = 645) and BCG Insomnia Index Employee Counterview (n = 500).

"We judge ourselves by our intentions and judge everyone else by their actions," says Julia Dhar, BCG managing director and partner and co-author of the bestseller *How Change Really Works*. "A CEO experiences a hard call as a defensible trade-off. An employee only sees the outcome, because the reasoning behind it was never made visible to them."

Indeed, conversations surrounding the funding of critical business priorities happen beyond the view of employees.

"There is so much that the employee doesn't see when it comes to how CEOs fight for them in the boardroom," says David Martin, BCG managing director and senior partner and head of its People and Organizational Practice. "CEOs know what's on their hearts. They just have to do more to convey that appropriately," he says.

The Price of Underestimating an AI Trust Crisis

The CEO-employee trust gap comes into sharp focus around AI transparency. Just 15% of CEOs worry their AI transformation could erode employee trust. But 40% of employees say their CEO has not been forthcoming enough about AI's impact on their roles and careers. And fewer than 10% give their CEO top marks for explaining how AI will affect jobs. (See **Exhibit 5**.)

"This is a moment where employees are trying to understand if CEOs really know what the future looks like," says Martin. "They want to know if they have a plan."

When invited to comment on their feelings, employees didn't hold back. One said their CEO "is playing games with AI, and it is creating anxiety and making people more uptight." Another questioned whether executives were truly engaged, writing, "sometimes it's like they're not bothered."

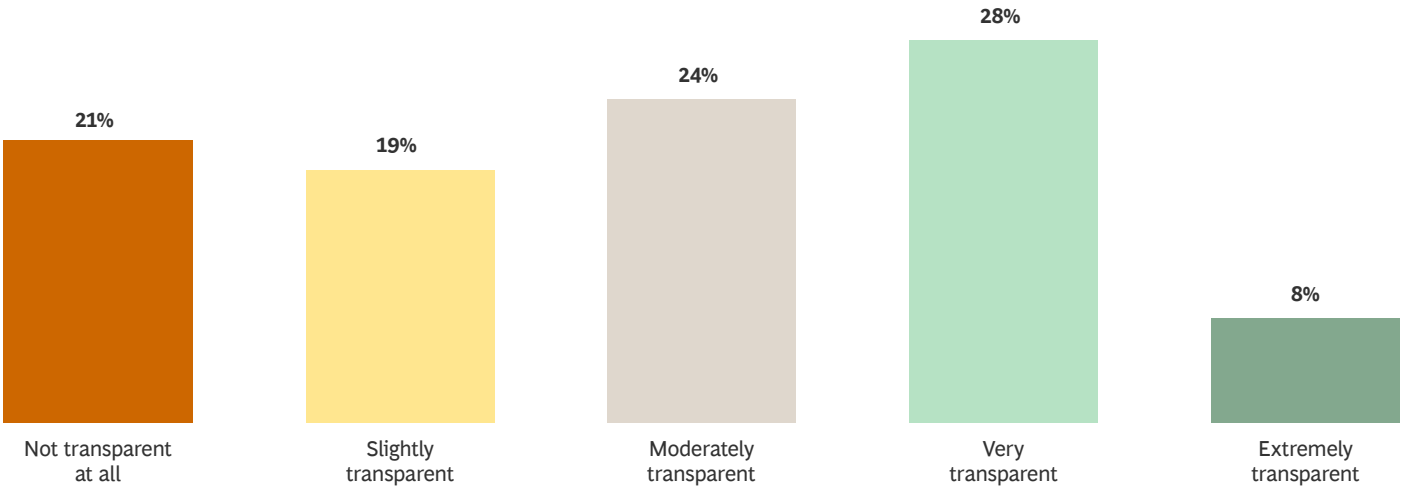
CEOs do recognize that employees are anxious about AI. As one put it, "AI is fueling anxiety, and we can't guarantee people's jobs to the extent they want."

Allaying those anxieties and building trust is not just a matter of keeping up morale. Trust tracks closely with how much employees are willing to give at work, which could prove to be a decisive success factor when AI is redefining roles.

EXHIBIT 5

Employee View on CEO AI Transparency

How transparent has your CEO been about the impact AI could have on employees' roles and career opportunities?



Source: BCG Insomnia Index Employee Counterview (n = 500).
Note: Answers to "Not transparent at all" and "Slightly transparent" were used to determine the percentage of employees who do not think their CEO has been transparent enough. The top marks designation is determined by the percentage who answered "Extremely transparent."

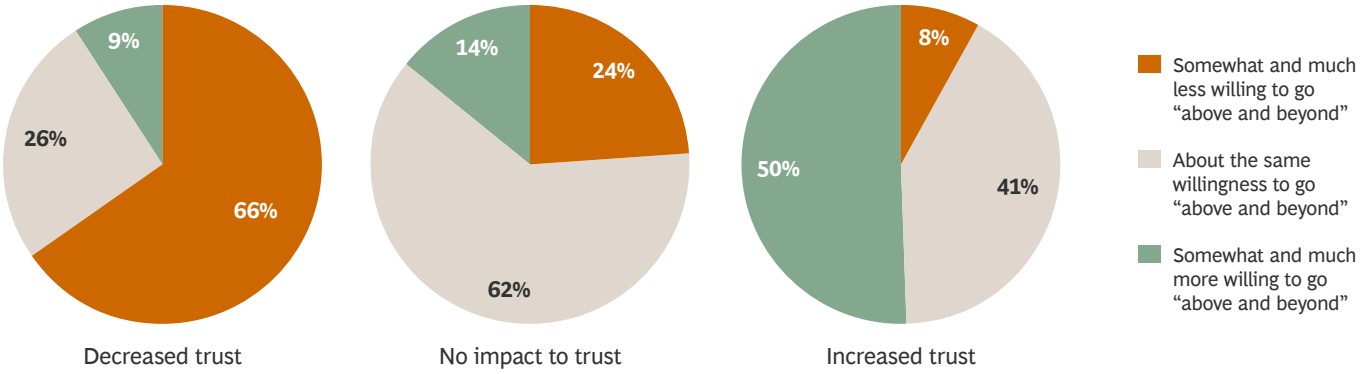
Among employees who say their CEO's leadership and communication on AI eroded their trust, fewer than 10% say they are more willing to go above and beyond in their roles than they were three months ago. But 50% of employees who say their CEO's stewardship of AI increased their trust are willing to go the extra mile. (See **Exhibit 6**.)

For their part, CEOs appear to be more concerned with familiar threats to employee trust than those posed by AI. When asked to choose the biggest trustbuster from a list of five, the largest share of CEOs cited cost-cutting measures, such as workforce reductions. The smallest share cited AI-driven workforce changes and automation, while communication and leadership transparency ranked second. (See **Exhibit 7**.)

EXHIBIT 6

Trust Is the Success Multiplier for AI Transformation

Work ethic distribution based on trust in the CEO's leadership during AI transformation

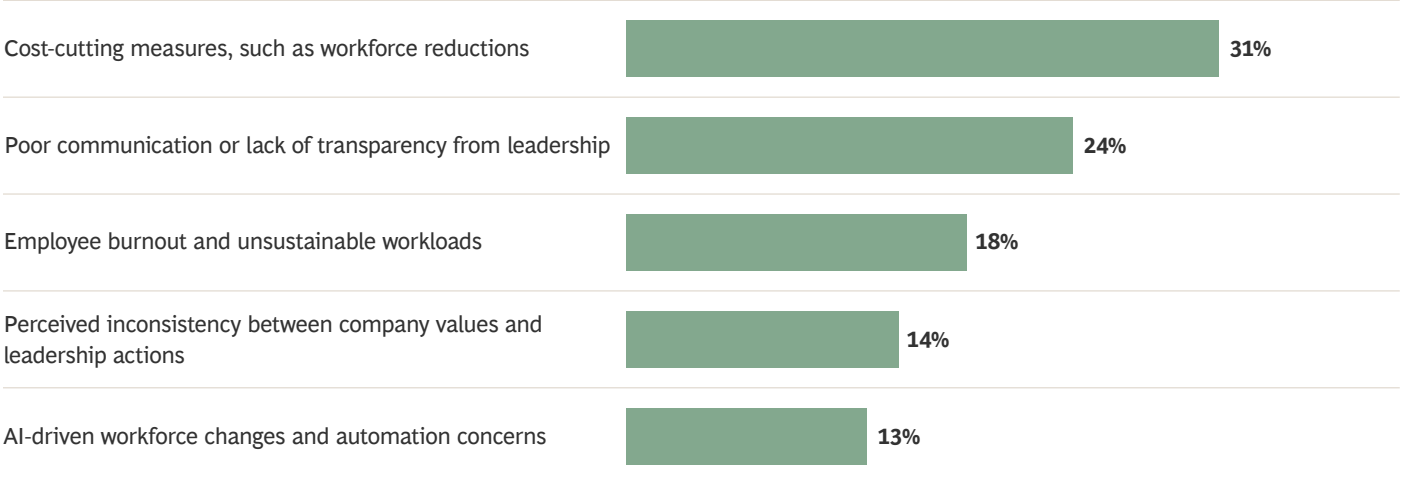


Source: BCG Insomnia Index Employee Counterview (n = 500).
Note: We compared responses to the questions, "To what extent has your CEO's leadership and communication during your organization's AI transformation affected your trust in them?" and "Compared with three months ago, how willing are you to go above and beyond in your role?" Instances where percentages do not add up to 100% are due to rounding.

EXHIBIT 7

Employee Trustbusters

Which of the following poses the greatest risk to employee trust in your leadership?



Source: BCG Insomnia Index, June–July 2026 (n = 645).

Those findings suggest leaders do recognize that words matter when difficult decisions are being made. But words are only part of the trust-building equation.

“CEOs assume that since employees hear their words, that’s enough to build trust, but employees also judge CEOs by their actions,” says Matthias Tauber, BCG managing director and senior partner and regional chair for Europe, the Middle East, South America and Africa (EMESA). “CEOs must be realistic in their words and consistent in their actions.”

One action that could be especially powerful is giving employees the skills to succeed with AI.

“CEOs are massively underestimating the training needed for their teams to be able to use AI,” says BCG Vice Chair Asia Pacific Managing Director & Senior Partner Neeraj Aggarwal. “When you are not trained, you are probably scared because you may feel that you’re becoming useless.”

CEOs may also underestimate what makes AI uniquely unsettling for employees. Past waves of technology automated tasks within knowledge work. AI agents can take on some of the work themselves. That tectonic shift can fuel deeper unease at a time when nearly half of employees (47%) already say senior leaders contribute to unnecessary work stress.

“It’s not the intention of management, but I think they are underestimating how stressful it is to see these new tools come and then be told to do whatever you can with them,” says Sylvain Duranton, managing director and senior partner and global leader of BCG X, the tech build and design division.



CEO PRESSURE VALVE

Build your AI fluency and that of your employees.

For CEOs, the path forward starts with building AI fluency, starting with their own.

“AI is a very fast-evolving topic, and I think CEOs genuinely may not know right now what it means for people’s jobs,” says Tauber. “That’s why CEOs need to upskill themselves and really develop that point of view.”

At the same time, CEOs need to show employees how AI will change their roles by making the tools available to them.

“What employees fear isn’t the technology. It’s what the technology will take from them before anyone tells them what that is,” says Dhar. “Trust in an AI rollout starts the moment people get their hands on the tool, not the moment they’re told about it.”

But tools alone aren’t enough. People need structured training and time to do it. “People are willing to learn,” says Aggarwal. “They just don’t know if they have the luxury of time to learn.”

An AI fluency ladder can make that transition more concrete by giving leaders and employees clear benchmarks for where they are and where they can go next. It also creates a shared language that can accelerate AI adoption across the organization.

CEOs Think They're Doing Enough to Create Trust. But Employee Discontent Carries a Cost.

When asked whether they were concerned about rising employee disgruntlement, 58% of CEOs said they were not.

While that may look like indifference, when asked to comment on why, many leaders pointed to efforts already underway to keep employees satisfied. "We treat employees with fairness," one wrote. Another cited rising engagement and transparency around AI implementation as evidence.

When CEOs are concerned with employee disgruntlement, they tend to focus not on the source of those feelings, but on how they can impact the business. As one put it, disgruntled employees "can ruin the culture." Others warned of missed growth targets, stagnation, and poor results.

CEOs who aren't worried about employee disgruntlement have significantly lower stress scores than those who are (58/100 versus 72/100). But what isn't keeping CEOs up at night today could become harder to ignore tomorrow. Persistent discontent can eventually show up in employee departures. And for every 10-percentage-point drop in the employee net entry rate[1] the likelihood of CEO exit rises by 15%.



CEO PRESSURE VALVE

Invite hard truths and fill the silence.

CEOs cannot address employee disgruntlement without a clear-eyed view of what their people are experiencing.

"CEOs remember the good town hall and let the 20 minutes of silence that followed it fade," says Dhar. "Memory edits itself under pressure, which is why six in ten CEOs aren't worried about disgruntlement they can no longer see clearly."

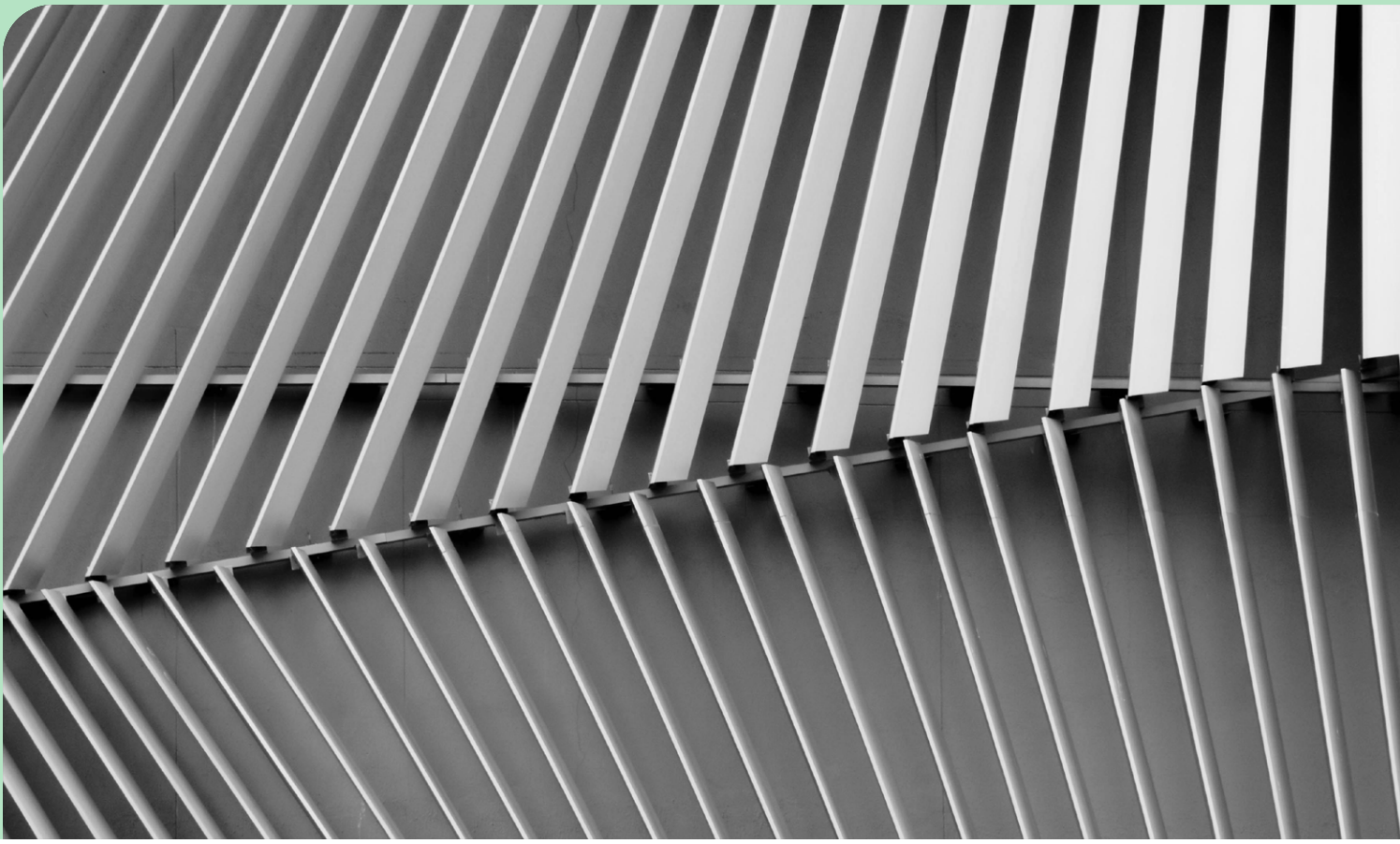
To gain true perspective, uncomfortable truths must reach the corner office.

"As a CEO, you need good feedback loops and mechanisms in place," says Martin. "Line leadership needs to convey a more realistic view of employee sentiment, versus the CEO only hearing what makes her or him happy."

They also need to ensure information flows both ways, even if CEOs aren't sure what to say.

"When CEOs don't have all the answers, silence can create a vacuum employees fill themselves," says Bedard. "When you don't know what to say, you actually need to say more. Because when employees aren't hearing anything, they're left to make their own assumptions."

1. Employee net entry rate is defined as the percentage difference between the number of new hires and the number of employees who leave, relative to the total workforce for a given time period. Our calculation is based on annual reported numbers.



As Business Pressures Mount, CEOs Have Less Time to Build Trust

As noted in our inaugural index, meeting growth targets, managing costs, fulfilling board expectations, and navigating geopolitical risks are pulling CEOs' attention toward immediate challenges.

Sixty percent of leaders overall say near-term pressures consume a disproportionate share of their time—a figure that rises to 68% for CEOs of the largest companies in our study.

CEOs also feel compelled to act on those pressures first. More than half (54%) often feel pressure to prioritize near-term performance over long-term growth investments.

Our research indicates that much of that stress is fueled by the board. (See **Exhibit 8**.)

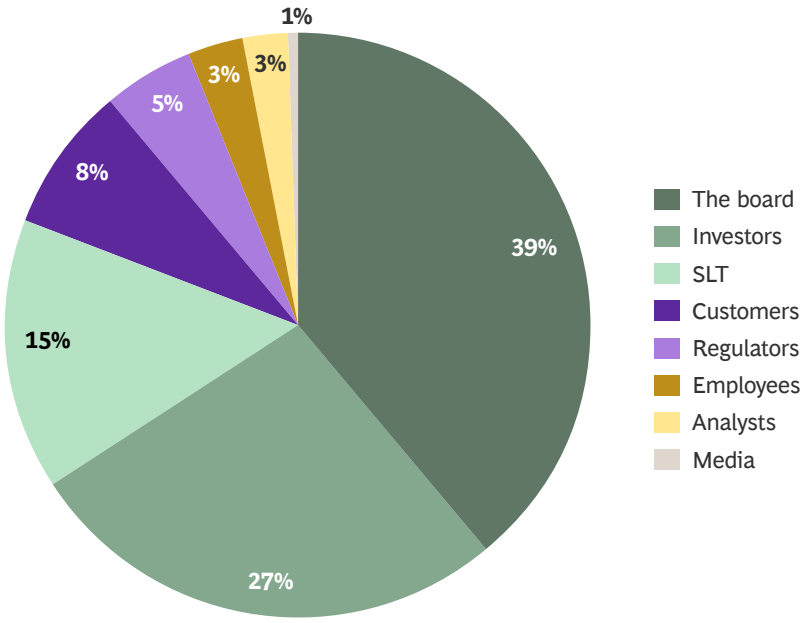
The velocity of change is also a major source of pressure on CEOs, with more than 40% ranking "moving too slowly to respond to changing market conditions" as their top concern. (See **Exhibit 9**.)

"The world is uncertain, and we don't know what it looks like in two years," says Martin. "Because of that, organizations are going to have to be incredibly nimble, and they are going to have to be able to respond to change faster."

EXHIBIT 8

Stress Is Fueled by the Board

Which stakeholder group is most responsible for driving up near-term performance pressures?

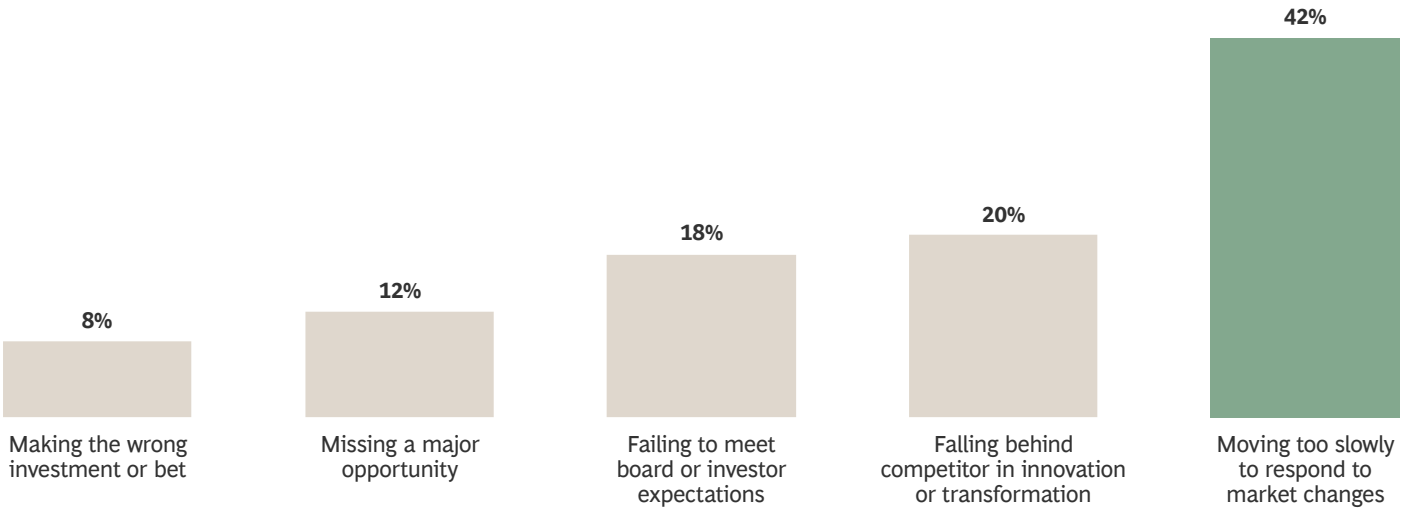


Source: BCG Insomnia Index, June–July 2026 (n = 645).
Note: Only participants who answered "often" or "very often" to the question "How often do you feel pressure to prioritize near-term performance over investments in long-term growth?" were asked this follow-up question. Percentages do not add up to 100 due to rounding.

EXHIBIT 9

CEOs Fear Moving Too Slowly

Which of the following concerns you most?



Source: BCG Insomnia Index, June–July 2026 (n = 645).

CEO PRESSURE VALVE

Invite employees to help shape the change and make failure a learning opportunity.

As operational demands crowd the CEO agenda, time for building employee trust becomes scarcer. It's therefore imperative that CEOs make better use of the time they do set aside for communicating with the rank and file.

"A handful of unscripted conversations with frontline employees do more for trust than a polished all-hands video, because people can tell the difference between being told something and being heard," says Dhar. "Most CEOs already have that hour; they just spend it producing the video instead."

Leaders can also give employees a bigger say in how AI changes their work.

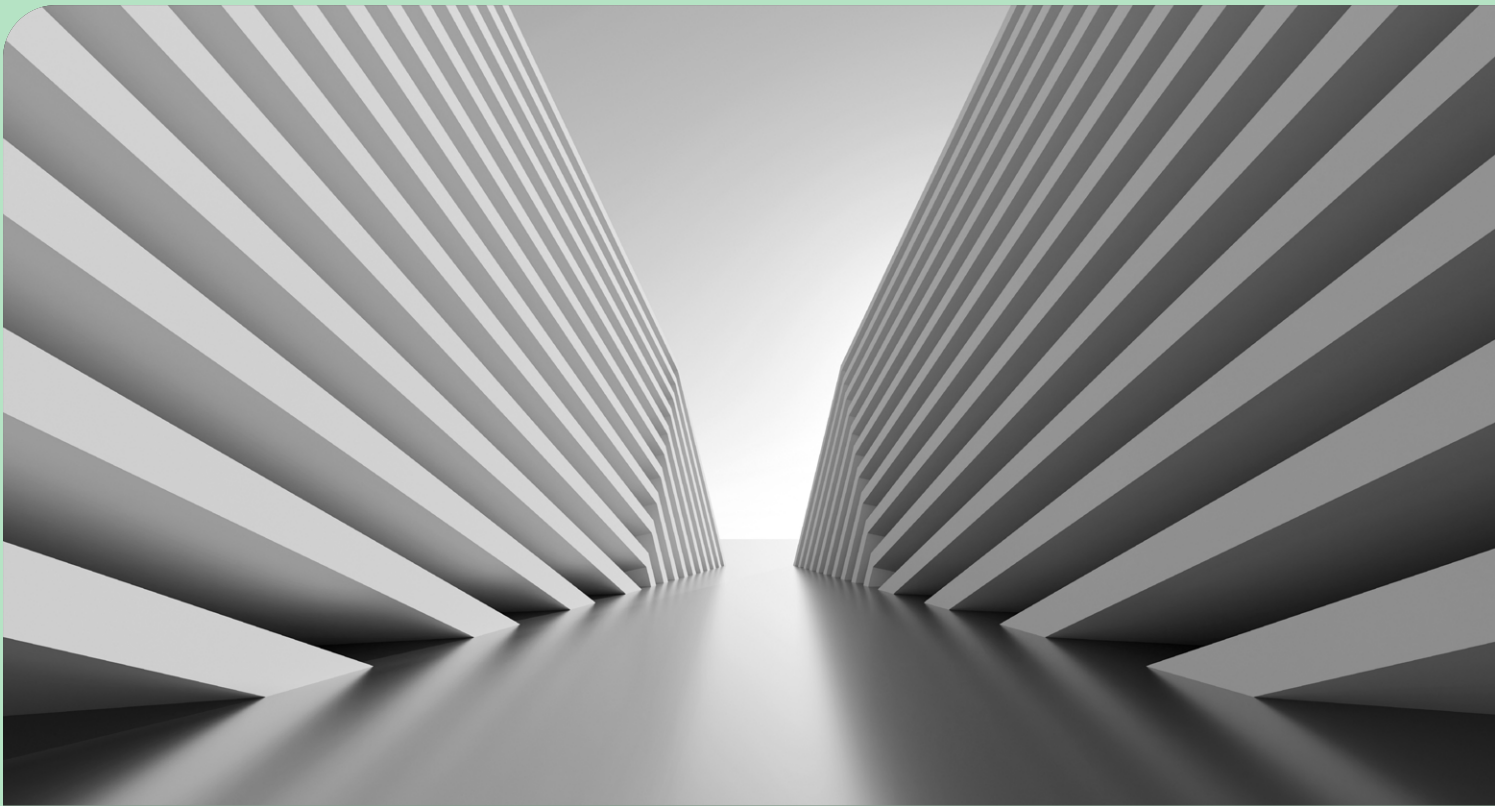
"Leaders must better understand the day in the life of a worker and the frictions they run into, and how and why AI tools could support them," says Martin. "And employees who are part of this creation process will feel more ownership over the outcome."

Employees also need to know that failure is not a ding against them, but a learning opportunity.

"Every CEO has a mental model of how much failure is admissible, and it's not known to the people," says Aggarwal. "So, if you say, 'Look, we're trying to be bold. Pioneering means there is a risk of failure, but that failure is not on you,' I think that message soothes the nerves. At the same time, it allows people to embrace it, so you create a bit more of a moonshot mindset."

Permission to fail, however, does need boundaries. Aggarwal advises CEOs to be explicit about where experimentation is encouraged and where the guardrails are nonnegotiable, such as with customer data.





CFOs in the Hot Seat as CEOs Question Their Senior Teams

Only 63% of CEOs are confident their senior leadership team can execute their vision over the next two to four quarters.

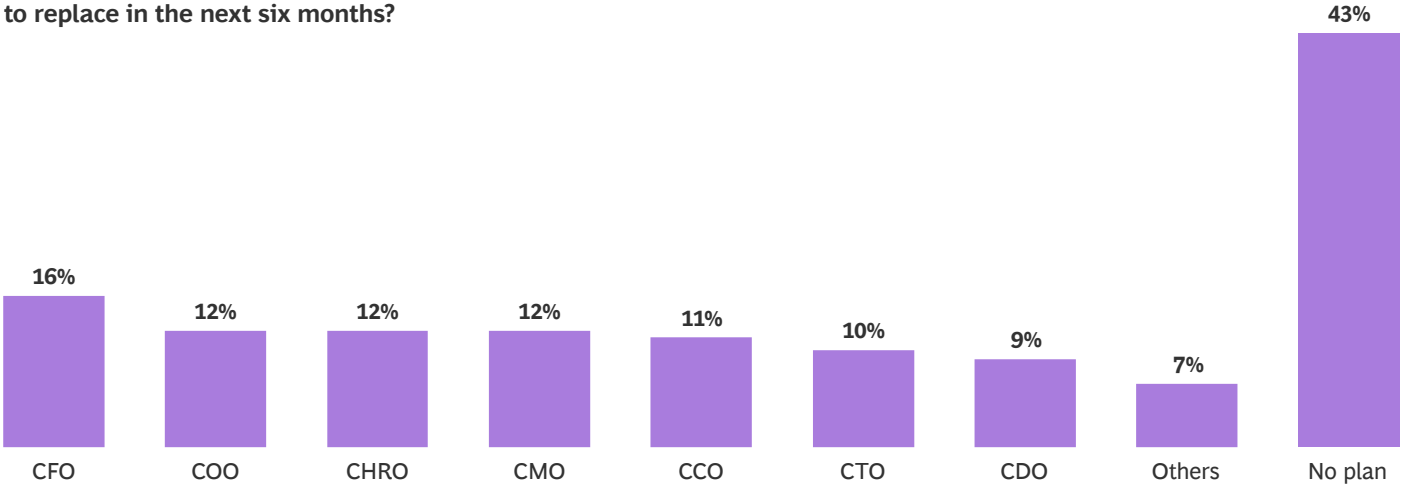
When asked to explain why they are disappointed in their senior teams, CEOs pointed to capability gaps and competing agendas. “My direct reports don’t have the skills to do their jobs,” one wrote. Another said, “Some C-level execs don’t play well with their peers without me holding them accountable.”

Our research suggests a C-suite shake-up may be coming for many organizations. Nearly 60% of CEOs overall—and 70% of those at the largest companies in our study—plan to replace a member of their C-suite in the next six months. CFOs top the list (See **Exhibit 10**), echoing a finding from our inaugural index, when 26% of CEOs named the CFO as the C-suite colleague who posed the greatest threat to their own job security.

EXHIBIT 10

CEOs' Plans to Shake Up the C-Suite

Which member(s) of your senior leadership team do you plan to replace in the next six months?



Source: BCG Insomnia Index, June–July 2026 (n = 645).



CEO PRESSURE VALVE

Challenge every senior leader to rethink their function for AI.

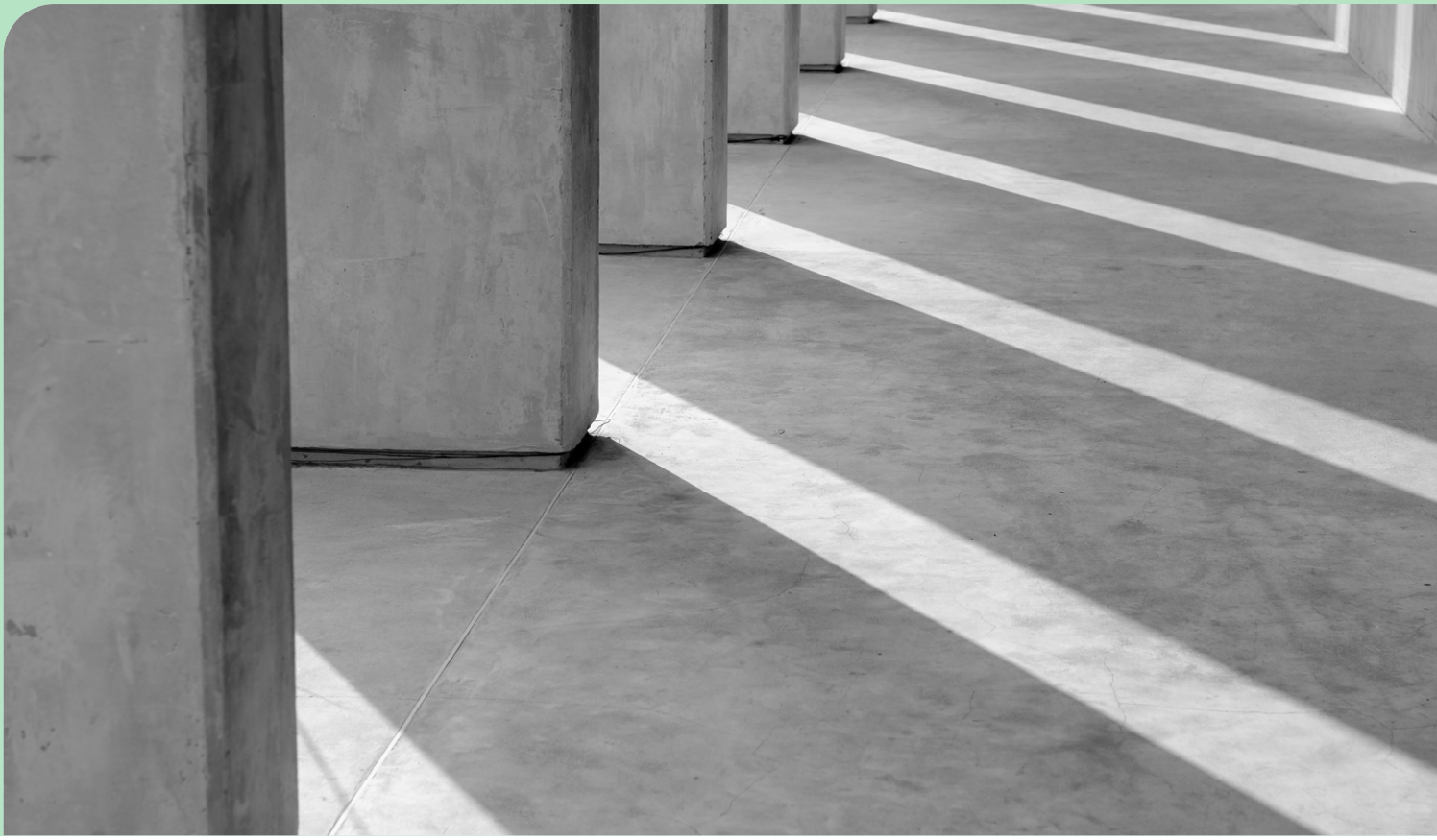
AI is evolving at a blistering rate, raising the bar for every senior leader. CEOs need to determine who on their top team is reinventing their function around AI, who has the capabilities and mindset to do so, and who is simply layering new technology onto old ways of working.

Some leaders may need new capabilities or support while others may no longer be right for what the business needs next. The CEO needs to determine the difference.

"I think people are too slow and too shy in rotating their teams," says Duranton. "They are not changing their teams enough."

The emotional dynamics of showing a senior leader the door can be difficult to manage, he adds. But the fresh perspective CEOs can gain is invaluable to a successful transformation. "For every long-term, grumpy executive that you let go, you'll gain a promising and enthusiastic person who is all in to support you."





One in Three CEOs Consider Stepping Down

Despite a more challenging environment, CEO stress and job-security concerns have eased.

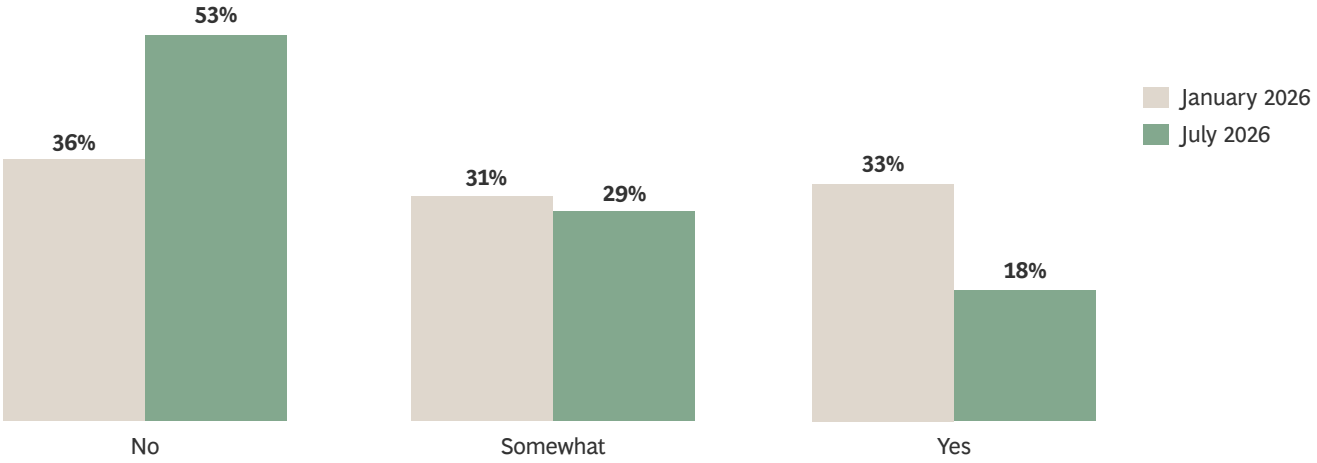
More than 80% of chief executives say they are unlikely to be replaced in the next 12 months, while 76% feel mentally prepared for the next two quarters. Stress on them is also easing, falling 2.5 percentage points from the first Insomnia Index to 64.2/100. That is below the threshold associated with high stress. Mean scores for top CEO stressors and stakeholders also declined.

One reason CEO pressures are dialing down may be that boards are easing up. CEOs report a marked decline in board scrutiny (15 percentage points), including among those who previously felt it most intensely. (See **Exhibit 11**.)

EXHIBIT 11

Board Scrutiny

Is the board scrutinizing your performance more now than they have in the last six months?



Source: BCG Insomnia Index, June–July 2026 (n = 645) compared with our January 2026 BCG CEO Insomnia Index Survey (n = 500).

Compared with other stakeholders, board-induced stress has the strongest relationship with overall CEO stress, underscoring board members' unique capacity to influence CEO pressure.

But scrutiny itself may matter less than how the board challenges the CEO and whether its questions ultimately make the business stronger.

"Too often still, board scrutiny is pure compliance," says Tauber. "But is that real, proper scrutiny in the most positive sense of challenging the strategy of the business and the quality of the team? Boards are overconsumed by making sure there's enough scrutiny on the regulatory side that there's no one able to really ask the hard questions."



CEO PRESSURE VALVE

Manage your board relationship before it manages you.

One way in which CEOs can more effectively manage board pressure is by helping directors understand the realities of the business.

"Board members are often chosen because they're good in their field, but they don't really know much about your business," says Aggarwal. "So invest in educating them. Take them to the shop floor and to the market."

When tensions are rife, keeping the board at arm's length may feel like a way to reduce pressure. But Duranton argues it can be counterproductive. Instead, he advises CEOs to only raise issues worthy of board involvement and then make their involvement a genuine exchange rather than presenting them with a finished answer.

"You can tell the board, 'There are some really important, difficult decisions I want to discuss. I've got my view, but let's discuss where you sit and where you are,'" he says.

Even though stress is falling for CEOs, some are thinking about leaving the corner office. More than 30% have considered stepping down more than once in the past six months. (See **Exhibit 12**.)

Their reasons will sound familiar to many employees: better health, more family time, work-life balance, and a happier life. So will their reasons for staying: financial security and rewards.

"I'm unable to balance my professional obligations with my family ones," one CEO wrote, "but compensation is why I stay."

But the question of whether to stay or go may also extend beyond personal reasons.

"I think the big existential question for CEOs is if they are the right person for AI," says Duranton. "It's the biggest legacy-defining move for a CEO right now."

Staying Comes With Trade-Offs for CEO Well-Being

Nearly half of CEOs often put off activities that support their physical and mental well-being.

"As the demands of the job go up, so, too, do the personal trade-offs," warns Tauber.

Those trade-offs are especially pronounced among newer CEOs. Nearly 60% of leaders who've been in the job less than a year often neglect their health and well-being, versus 36% who have been in the job five years or more.

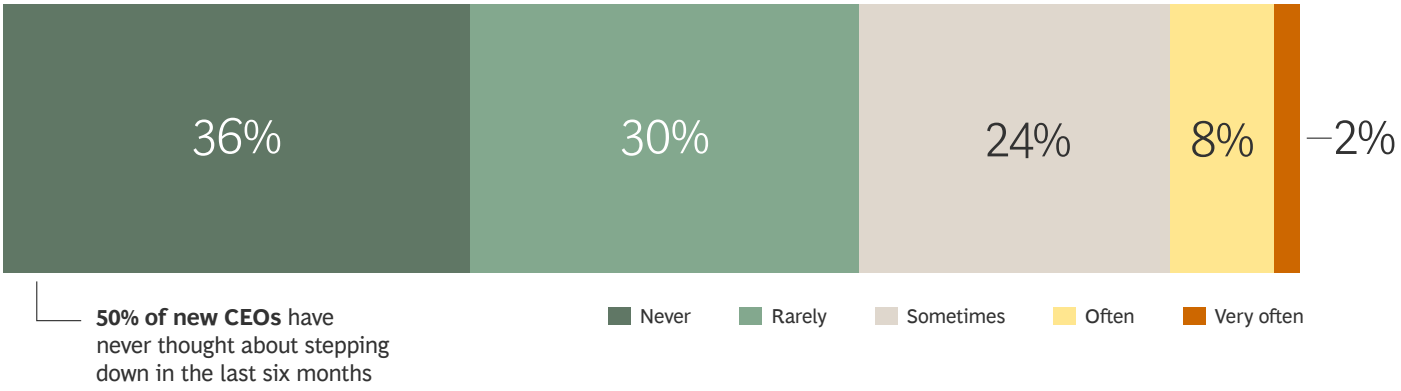
Deferring well-being is closely associated with higher stress, with CEOs who very often neglect their health reporting stress scores 21.5 percentage points higher than those who never do.

Behind those numbers is a sense that the top job has become harder. "The stress of the position is greater today than ten years ago," one CEO wrote. "You have to keep it together more today."

EXHIBIT 12

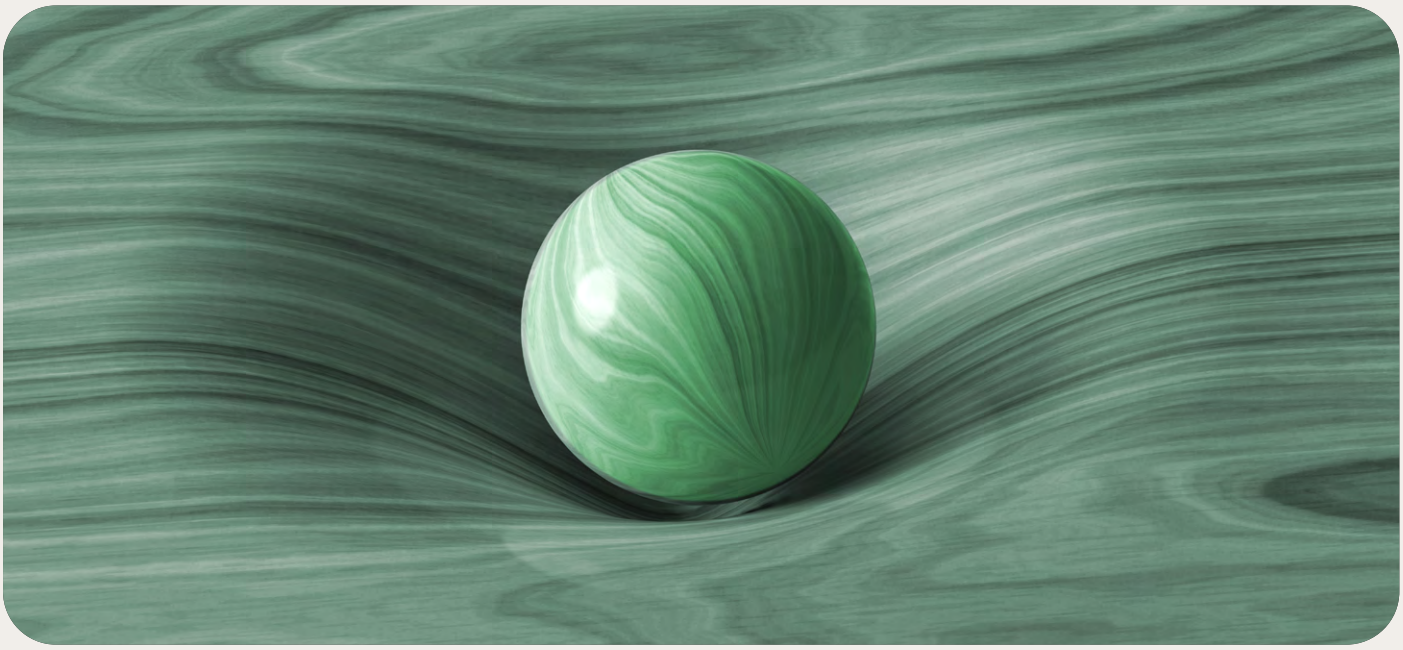
CEOs Still Want the Job

In the last six months, how often have you thought about stepping down from your role?



Source: BCG Insomnia Index, June–July 2026 (n = 645).

Methodology



The BCG CEO Insomnia Index blends firsthand CEO perspectives with rigorous analytics to reveal the personal and organizational dimensions of executive stress. It centers on six core stress drivers specific to the role of CEO: business performance, external uncertainties, innovation demands, board and investor sentiment, talent, and reputation.

The Index draws from three data sources:

- A proprietary survey of 645 CEOs from leading companies ($100 million or more in revenue). The survey was designed to assess stress and sleep levels while offering deep dives within the six core stress drivers, focusing specifically on the hallmarks of workplace stress: tension, pressure, and scrutiny. The survey period was June 18 through July 5, 2026.
- A complementary survey of nonexecutive employees (n = 500) to provide the employee viewpoint. The survey period was from June 23 to June 25, 2026.
- Five years of CEO turnover data from the S&P 1200.

To fully capture the pressure CEOs face, each driver was examined in two ways:

- Personal stress levels, as self-reported in the CEO Insomnia Index Survey.
- Organizational stress signals, modeled in the CEO Job Security Model.

The BCG CEO Insomnia Index top-line score is based on the average response to a single question: "During the past quarter, how would you rate your overall level of job-related stress, with '0' meaning no stress and '100' meaning extreme stress?" This question was adapted from the Perceived Stress Scale developed by Sheldon Cohen, Thomas Kamarck, and Robin Mermelstein in "A Global Measure of Perceived Stress" (*Journal of Health and Social Behavior*, 1983), with the 0–100 range selected to allow greater sensitivity to variation.

CEO stress is defined as a state of mental worry or tension caused by the demands of the CEO role.

Because individual survey responses are anonymized and cannot be linked to company outcomes, CEO turnover was used as a proxy for company-level stress. The model uses a logistic regression approach, with actual CEO exits from the S&P 1200 over the past five years as the dependent variable, predicting the likelihood of CEO turnover in the next quarter. Independent variables include net entry rate, sentiment analysis from our earnings call data, negative media mentions, total shareholder return, and more.

The CEO-Board Stress analysis combined independent-samples tests for the full sample with within-person paired tests and change-score regression for the panel data. This approach allows both population-level and individual-level conclusions to be drawn.

Featured Experts



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10/26

