REPORT 04 — MARKET STRUCTURE

AI Is Changing the Basis of Competition

When almost everyone has access to the same models, access stops being the advantage. Speed and judgment take its place.

STRATEGY MARKET STRUCTURE DECISION-MAKING 11 MIN READ

THE BASIS OF COMPETITION, THEN AND NOW

OLD BASIS

- Scale and cost advantage
- Proprietary data, hoarded
- Functional silos, annual strategy cycles
- Access to the best analysts

NEW BASIS

- Speed of workflow redesign
- Judgment + AI fluency, combined
- Cross-functional operating models, continuous reprioritization
- Access to the same models as everyone else

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KEY TAKEAWAYS

- **75% of executives** now name AI a top-three strategic priority — but the market is already splitting into **5% future-built, 35% scaling, and 60% lagging**, and that split is itself becoming the competitive map.
- The first half of 2025 saw **more strategy-related AI tools launched than the prior two years combined** — the tools are commoditizing fast.
- AI reliably helps with market intelligence and research. It has **not yet improved judgment-intensive calls** — M&A, partnerships, portfolio decisions — which is exactly where competitive separation is shifting.
- The labour market is repricing around this shift too: a net **78 million new jobs** by 2030, concentrated in AI-adjacent skills.
- Strategy itself is changing shape: less "which tool," more "which operating model can act on what the tools surface — faster than the competition."

The market is already sorting itself into three tiers

BCG's research finds three-quarters of executives now rank AI a top-three strategic priority for their organization. That consensus is exactly why AI access, on its own, no longer differentiates anyone — everyone is pursuing it. What differentiates is what BCG's parallel maturity research shows forming underneath that consensus: a market splitting into 5% "future-built" companies pulling decisively ahead, 35% "scaling" and beginning to capture value, and 60% still capturing almost none.

WHERE THE MARKET SITS TODAY

5% future-built 35% scaling 60% lagging

Source: BCG, The Widening AI Value Gap — Build for the Future 2025.

The tools are commoditizing. Judgment isn't — yet.

BCG's 2026 look at the corporate strategy function found the first half of 2025 alone saw more strategy-related AI tools launched than the previous two years combined — a flood that's rapidly turning "we use AI for research" into table stakes rather than a differentiator. The same research found those tools deliver consistent, positive impact for strategy leaders specifically in market intelligence and research. They have not materially improved the judgment-intensive, high-stakes activities — M&A, partnerships, portfolio management — that used to be where strategy work actually earned its keep.

That's the mechanism behind the basis-of-competition shift: as the research layer commoditizes, the competitive contest moves up a level, to whoever can turn AI-augmented research into a faster decision and a redesigned workflow. McKinsey's estimate of where generative AI's economic value actually concentrates — customer operations, marketing and sales, software engineering, and R&D — describes the same four functions where that contest is playing out first.

> "By contrast, more judgment-intensive, high-stakes activities related to M&A, partnerships, or portfolio management have not seen material improvements."

— BCG, The Corporate Strategy Function in an AI-First World, 2026

The labour market is repricing around the same shift

The World Economic Forum's Future of Jobs Report 2025 — based on more than 1,000 employers representing 14 million workers — projects a net gain of 78 million jobs globally by 2030, with 39% of core workforce skills expected to change over the same period. 60% of employers expect broadening digital access to redefine their business by 2030. None of that reads as AI replacing competition; it reads as competition relocating to whoever can field the judgment and skills the new work actually requires.

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The data

FINDING	SOURCE	YEAR
75% of executives name AI a top-3 strategic priority	BCG, Closing the AI Impact Gap	2025
Market splits into 5% future-built, 35% scaling, 60% lagging	BCG, Widening AI Value Gap	2025
H1 2025 saw more strategy AI tools launched than the prior two years combined; value confined to market intelligence, not M&A/portfolio judgment	BCG, Strategy Function in an AI-First World	2026
75% of GenAI value concentrates in customer ops, marketing/sales, software eng, R&D	McKinsey Global Institute	2023–25
Net 78M new jobs by 2030; 39% of core skills change; 60% expect digital access to redefine their business	WEF, Future of Jobs Report 2025	2025

COMETX PERSPECTIVE

The strategy world briefly imagined AI would make strategy itself easier. What the evidence actually shows is that AI made the easy part of strategy — gathering and summarizing information — nearly free, which raises the bar on the hard part: deciding, under uncertainty, with people who disagree, faster than a competitor doing the same. That's an operating-model and leadership-bench problem, not a tooling problem, and it's why "our AI strategy" increasingly means "who decides, how fast, and with what judgment" rather than "which model we licensed."

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Where CometX fits

If judgment and operating-model speed are the new competitive terrain, three CometX practices apply directly:

01

Consulting & advisory

Strategy and program design, and theories of change, that redesign the operating model around faster, evidence-backed decisions — not just faster research.

02

EDIA & women's advancement

Inclusive leadership and sponsorship work that broadens the judgment bench — a wider range of decision-makers is the point when judgment itself is the scarce resource.

03

Applied research

Rapid evidence reviews that keep strategy grounded as the competitive landscape shifts quarter to quarter, not year to year.

Request a proposal

Explore EDIA & leadership work →

SOURCES

1. Boston Consulting Group, "From Potential to Profit: Closing the AI Impact Gap", 2025.
2. Boston Consulting Group, "The Widening AI Value Gap: Build for the Future 2025", September 2025.
3. Boston Consulting Group, "The Corporate Strategy Function in an AI-First World", 2026.
4. McKinsey Global Institute, "The Economic Potential of Generative AI", 2023.
5. World Economic Forum, "The Future of Jobs Report 2025", January 2025.

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