

POSITION PAPER | Giuseppe Di Franco

Industrializing AI

**The Strategic Role of the Digital System Integrator
in Value Creation and Digital Sovereignty**

Key Takeaways

The adoption of AI increases the value generated by organizations capable of transforming core processes, codifying industry-specific knowledge, governing data and AI agents, and assuming long-term accountability for outcomes. At the same time, AI diminishes the value of components that can be easily replicated. In the Italian context, such accountability also extends to digital sovereignty and the safeguarding of national industrial capabilities.

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Executive summary

Employing AI for Industrial Value Creation

The emerging phase will not simply reward those who make greater use of Artificial Intelligence. Rather, it will reward those capable of translating AI into industrial capability: improved processes, new revenue streams, faster decision-making, more resilient operations, and greater control over strategic digital assets.

Generative and agentic AI are reshaping the role of software. Rather than merely recording information or automating predefined instructions, software can now interpret information, coordinate activities, and can take decisions within defined operational contexts. With Physical AI, these capabilities are also extending into manufacturing plants, logistics systems, networks, and infrastructures.

AI thus becomes a new operational layer of the enterprise, positioned at the intersection of strategy, business processes, data, applications, and the physical world.

For markets and institutions, the movement is twofold. Some components become faster and easier to standardize: documentation, repetitive coding, testing, common configurations, research, and classification. At the same time, the set of economically transformable processes expands, and new reservoirs of value open up: growth, personalization, quality, avoided risk, resilience, intelligent services, and the automation of activities that were previously not economically viable to address. The managerial question is therefore not how much work AI eliminates, but which capabilities it frees up and where those capabilities are reinvested.

In this scenario, **industry expertise** becomes the primary factor of differentiation. General-purpose models do not, by themselves, possess the semantics of data, operational exceptions, regulatory constraints, and decision-making criteria specific to a given sector. Nor is sector-specific knowledge alone sufficient: it must be combined with proximity to the individual client, its core systems, the actual quality of its data, and its organizational culture. The most defensible advantage arises from this dual verticalization – across both the industry and the client (within its market context) – when it is codified into process blueprints, ontologies, data products, agents, connectors, controls, and benchmarks.

The Digital System Integrator therefore plays a broader role. In complex systems, accelerating a single task does not necessarily increase the productivity of the enterprise or institution: outcomes remain constrained by procedures, approvals, disorganized data, incompatible systems, and other bottlenecks. Its task is to remove these constraints across the end-to-end process, connecting **strategy, data, applications, infrastructure, cybersecurity, people, and robots**, so that local efficiency translates into economic value or service quality. It must also assume responsibility for ongoing operations (the run phase) and make technological dependencies governable.

This function is particularly relevant for Italy. The digital market reached €84.4 billion in 2025; ICT services accounted for €18.8 billion, AI spending for €1.38 billion, and cybersecurity for €2.24 billion. But the real opportunity is not merely quantitative: it derives from the combination of manufacturing, regulated sectors, critical infrastructures, SMEs, a heterogeneous application landscape, and skills distributed unevenly across the economy. It is precisely this complexity that makes the ability to transform global technologies into local value so precious.

Physical AI, quantum technologies, and inorganic growth represent three complementary frontiers.

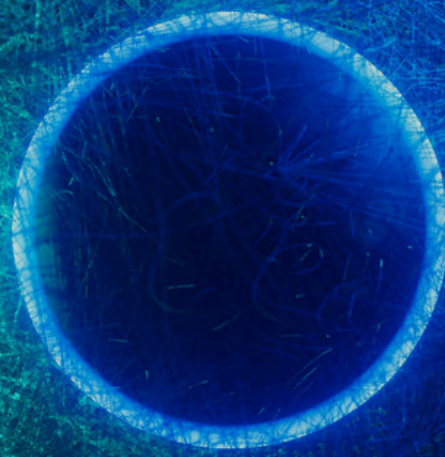
Physical AI extends integration into physical operations and makes IT/OT expertise, safety, and industrial cybersecurity increasingly critical. Quantum technologies should be approached through selective experimentation, while crypto-agility and post-quantum migration are already on the current agenda. Finally, this technological discontinuity opens a window for consolidation: vertical assets, agentic capabilities, AI assurance, robotics, and industrial software can be accelerated through programmatic build-buy-partner strategies.



The leading system integrator in the AI era is a transformer of processes, a steward of industry expertise, a producer of assets, a platform operator, an integrator of the physical world, a data architect, a custodian of model sustainability and integrity, a guarantor of trust, and an orchestrator of sovereignty. Its economic legitimacy derives from the value it enables and from the responsibility it is able to assume.



01



Where Value Shifts

From the productivity of individual tasks to the transformation of how the enterprise operates.

1.1 AI as a New Operating Layer

AI is reshaping the production function of digital services. Many technical activities become faster and more industrializable; at the same time, language, context, and unstructured knowledge become manageable by software, making it economically feasible to address processes that were previously too complex or fragmented. The overall effect is not a simple reduction of the market: it is a redistribution of value along the services value chain. BCG estimates new pools of demand of up to USD 200 billion over the next five years for the build, deploy, run, oversight, and governance of agentic solutions.

Seizing this opportunity requires transforming the way the enterprise learns, coordinates work, and makes decisions. Technology and organization must evolve together, supported by clear delegation, aligned incentives, and accountability for outcomes. Experience gained through the use of AI must become shared knowledge and be translated into improved procedures, overcoming traditional boundaries between functions.

The objective is to enhance the competitiveness of the enterprise. Efficiency must be accompanied by effectiveness: a deeper understanding of the market, stronger customer relationships, innovation in offerings, and the development of new business models. The capacity released through automation must be reinvested according to these priorities.

Every AI programme should therefore begin with measurable business objectives: growth, profitability, customer retention, service quality, and speed of innovation. The Digital System Integrator is responsible for linking these objectives to the transformation of processes and organizational structures, integrating the necessary technologies and assuming responsibility for outcomes over time.

THE BOTTLENECK PRINCIPLE

In a complex system, overall performance is determined by the constraint rather than by the fastest node. Accelerating an individual task without redesigning the underlying flow produces local sub-optimization: greater output at a given point, but not greater throughput or value creation. The Digital System Integrator must act upon data, systems, roles, authorizations, and controls so that productivity can propagate throughout the process and be converted into measurable outcomes.



1.2 What Diminishes and What Emerges

The value of the mere availability of technology is declining. Access to models, AI-assisted coding capabilities, automated testing, and recurring configurations are progressively becoming expectations embedded in service quality. They are not disappearing, but they are becoming less differentiating.

By contrast, the value of six capabilities is increasing: identifying the bottlenecks that constrain outcomes and selecting the processes with the greatest economic impact; preparing data and knowledge for use by agents; integrating legacy, cloud, and core systems; redesigning decisions, controls, and roles; ensuring security and adoption; and managing value during the run phase. The new growth areas are process transformation, data and knowledge engineering, agent orchestration, AI assurance, Managed AI/AgentOps, sovereignty, and Physical AI.

GUIDING VALUE FORMULA

Net Value of AI = Productivity + Growth and Innovation + Quality + Avoided Risk + Resilience and Sovereignty – Transformation Cost – Run Cost – Change Cost – Residual Risk.



1.3 The New Economics of the Digital System Integrator

Productivity gains in delivery do not automatically translate into higher margins. Part of the benefit is transferred to the client, while costs related to compute, licenses, platforms, assurance, and asset development increase. The quality of growth therefore depends on the ability to retain a portion of these productivity gains through intellectual property, vertical expertise, platforms, recurring services, and responsibility for outcomes.

The revenue mix tends to shift toward recurring revenues and revenues more closely tied to underlying business processes subscriptions for assets and platforms, Managed AI, AgentOps, continuous assurance, and, where outcomes are measurable, value-linked components. There is no single commercial formula: the model must reflect process maturity, causality, measurability, and risk allocation.

The main competitive pressure stems from the standardization of replicable components and the potential disintermediation by vendors, platforms, and clients' internal organizations. The response is not to defend undifferentiated activities, but to reposition the value proposition around architecture, processes, industry expertise, trust, and ongoing operations.



02

Italy and the Advantage of Dual Verticality

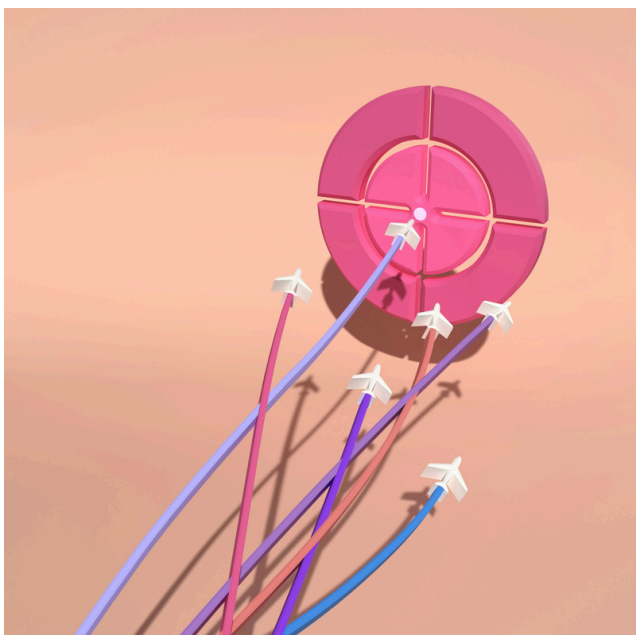
Transforming Global Capabilities into Local Value

2.1 Why Italy Increases the Value of System Integration

Italy combines a broad manufacturing base, a strong presence of regulated sectors and critical infrastructures, a network of SMEs, heterogeneous legacy systems, and an uneven distribution of skills. This complexity makes the direct adoption of standard solutions less effective and increases the value of the ability to intervene across end-to-end processes: contextualizing technology, integrating it with existing environments, and removing constraints in data, authorizations, systems, and organizational structures. Otherwise, AI accelerates individual activities without producing a proportionate economic impact.

This requirement takes different forms across the main sectors of the Italian economy, but follows the same underlying logic: integrating AI into the processes, systems, and constraints specific to each context. In particular:

- **Manufacturing:** integrating AI into production processes, connecting it with OT, MES, and ERP systems, supply chains, digital twins, computer vision, and robotics, without compromising safety and operational continuity.
- **Finance and insurance:** using AI in decision-making and operational processes, integrating it with data platforms, core systems, control engines, and explainability tools, while ensuring that decisions remain transparent and auditable.
- **Public administration, healthcare, and justice:** applying AI by integrating databases, legacy systems, workflows, and interoperable platforms, while ensuring traceability, human oversight, security, and control over data.
- **Utilities and telecommunications:** using AI to manage and optimize networks and critical infrastructures, integrating it with monitoring systems, edge computing, IoT, and operational platforms, under demanding requirements for resilience and cybersecurity.
- **SMEs:** making available vertical, preconfigured, and managed AI solutions, integrated with ERP, CRM, and cloud-based tools, at sustainable costs and with sufficient replicability to benefit from economies of scale.



2.2 Dual Verticality

Vertical expertise operates at two complementary levels. The first is the industry level: economic models, regulation, processes, data, and shared benchmarks. The second is the individual client level: the application landscape, actually available data, decision-making practices, exceptions, and strategic priorities. Leadership is built by industrializing what is common across the sector while preserving what makes the client unique.

Understanding the client also means understanding the supply chain in which it operates. The availability of production capacity, the quality of supplies, and the reliability of deliveries depend on relationships with suppliers and partners that shape the competitiveness of the enterprise. Improving a business process may therefore leave unresolved the bottlenecks that originate beyond its organizational boundaries.

The Digital System Integrator must translate this knowledge into a capability to intervene across the end-to-end process, connecting data, systems, and responsibilities among the organizations involved. Its contribution consists in identifying common constraints and developing AI solutions that make information usable, support operational coordination, and improve overall outcomes.

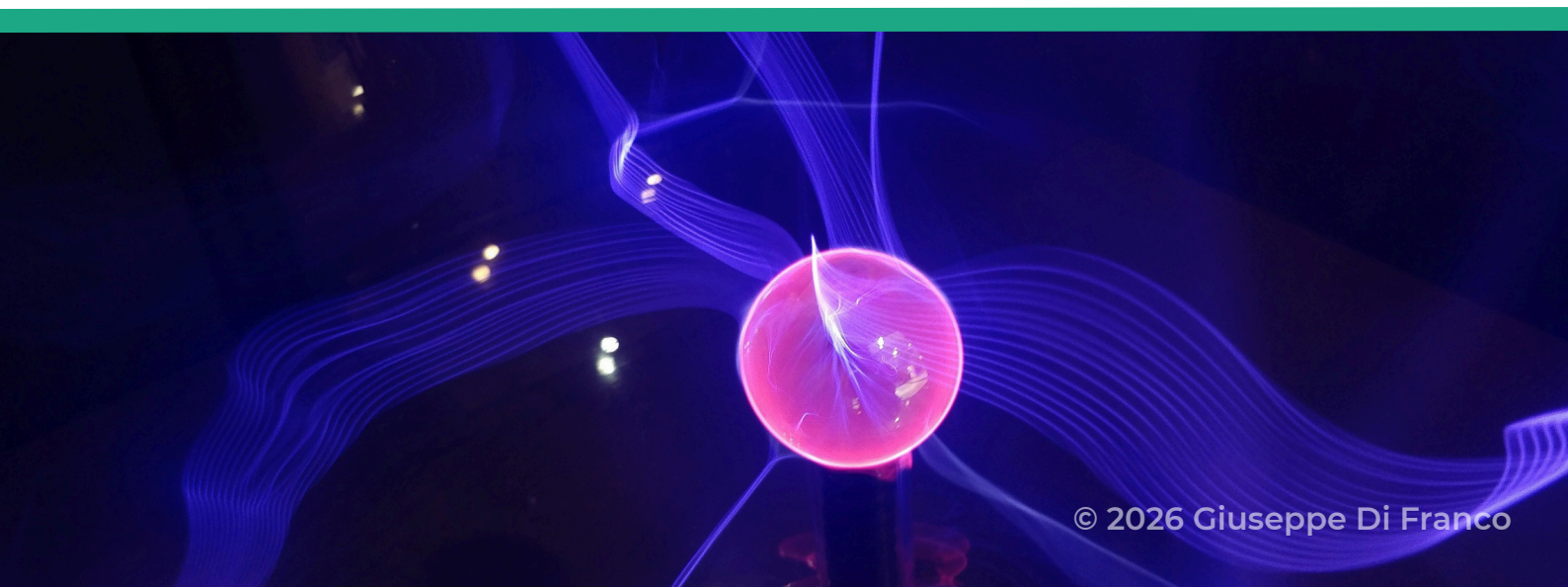
Scalability arises from codifying this body of knowledge into reusable assets. Process blueprints, ontologies, knowledge graphs, data products, vertical agents, connectors to core systems, control libraries, and benchmarks transform experience into intellectual property, making value replicable while maintaining alignment with the context of the client and its supply chain.

This knowledge must become a scalable asset. Process blueprints, ontologies, knowledge graphs, data products, vertical agents, connectors to core systems, control libraries, and benchmarks transform experience from tacit knowledge into reusable intellectual property.

2.3 The new role of the Digital System Integrator

The role of the Digital System Integrator in generating value for the client derives from its ability to connect diverse ecosystems and assume responsibility for the competitive whole, rather than solely from expertise in a specific technology. The reference landscape and the main areas of integration are as follows:

- **AI-native boutiques:** bring speed and specialized talent; the integrator adds scale, industry expertise, cybersecurity, operations, and access to core processes.
- **Industrial automation:** possesses deep knowledge of machinery and OT environments; the integrator connects the physical world, data, enterprise applications, and governance.
- **Software vendors:** offer depth of product expertise, but within a limited scope; the integrator designs the end-to-end process and coordinates multiple components.
- **Vertical technologies and models:** offer ready-made but constraining solutions; the integrator guarantees an agnostic approach, safeguarding the customer's flexibility and future freedom of choice.
- **Hyperscalers:** provide scale and innovation, but tend to prioritize their own technology stack; the integrator ensures multi-vendor orchestration, integration with legacy systems, and portability.





The New Industrial Model of the Digital System Integrator

A Platform of Capabilities, Assets, and Responsibilities

3.1 A Five-Layer Model

To transform AI from a set of experiments into an industrial capability, the system integrator must manage an integrated value chain that extends from infrastructure to the management of outcomes over time. The model consists of five complementary layers:

1. Digital Foundation: hybrid cloud, compute, networking, identity, security, data platforms, and integration fabric.

2. AI Engineering: models, RAG, evaluation, MLOps/LLMOps, agent frameworks, and tool integration.

3. Agentic Control Plane: registry, policy, identity, observability, guardrails, audit, cost control, and human escalation.

4. Industry Solutions: industry-specific processes, data, agents, controls, and core integrations.

5. Managed Outcomes: end-to-end run, continuous improvement, SLA/SLO management, and accountability for outcomes.

Differentiation arises from the combination of these layers. A foundation without industry expertise produces horizontal technology; industry expertise without a platform does not scale; build without run does not ensure continuity of value.

3.2 AI-First Delivery and Human Capital

A system integrator must apply AI to its own way of working. Origination, solutioning, engineering, testing, transition, and operations must be redesigned through approved tools, governed assets, and quality metrics. The capacity thus released should be reinvested in architecture, security, technical debt reduction, industry depth, and the development of intellectual property, rather than being viewed solely as a source of cost compression.



The workforce mix is shifting toward roles that combine technological expertise with contextual understanding process architects, industry experts, data and knowledge engineers, AI product and agent engineers, AI security and model risk specialists, change leaders, and experts in robotics and OT. The challenge is to preserve learning pathways through human-AI collaboration, structured reviews, industry-specific academies, and certifications based on demonstrated capabilities.

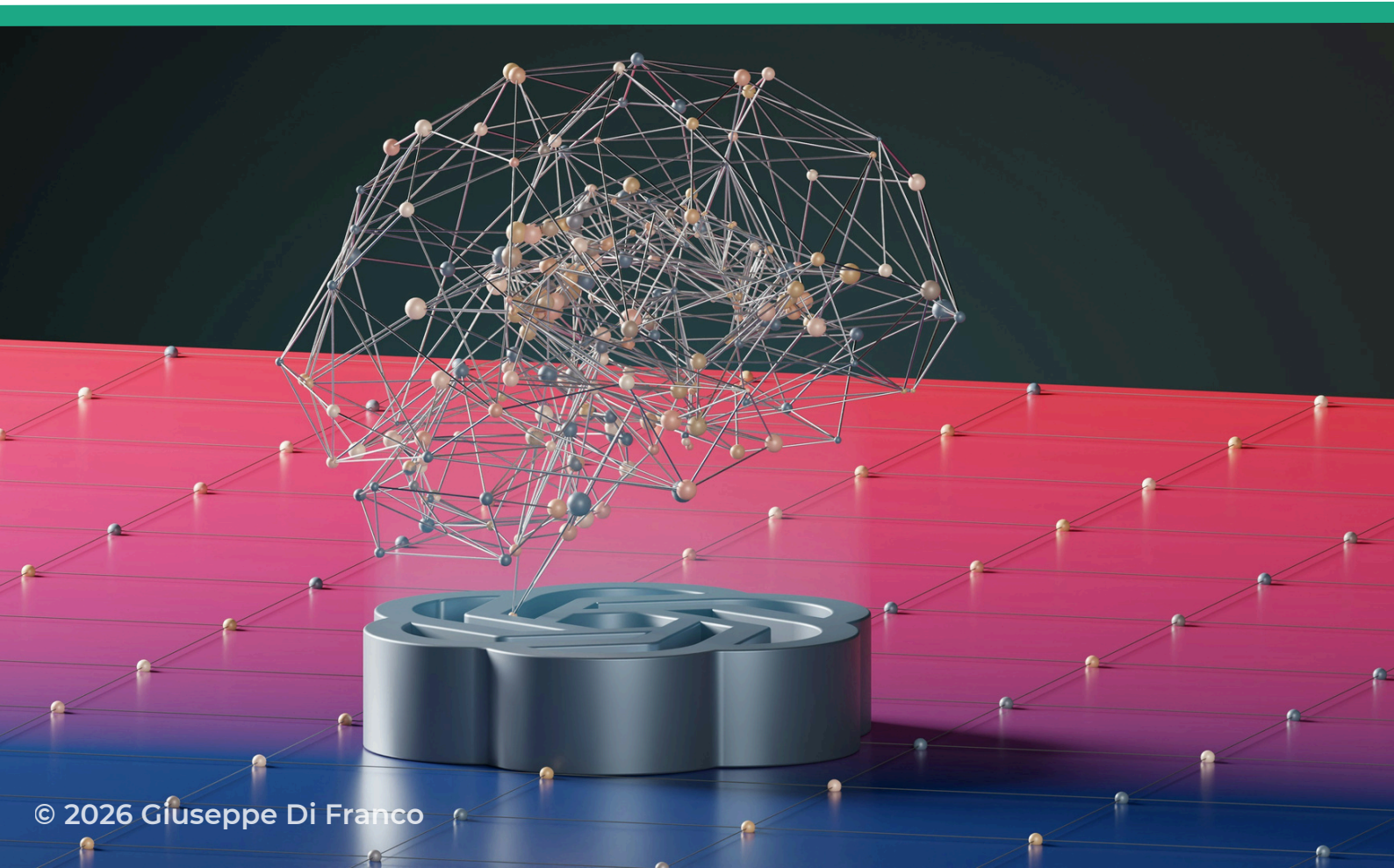
In this context of profound transformation, a priority focus emerges on the Italian industrial landscape, characterized by a broad base of SMEs where the industrialization of AI inevitably encounters cultural barriers and a shortage of internal skills. In this environment, the role of the System Integrator evolves: support limited to purely technological services is complemented by structured services for organizational orchestration and AI change management. This combined approach represents the essential behind-the-scenes support to enable and accelerate real adoption, laying the foundations for effective implementation and for the development of continuous learning and organizational capability-building programmes.

3.3 Run as a Platform for Value

With agents and probabilistic systems, the run phase is no longer a residual stage. It is the point at which value is measured, behaviours are observed, errors are corrected, costs are optimized, and policies and data are updated. Managed AI and AgentOps encompass continuous evaluation, drift and anomaly detection, exception handling, cost optimization, vendor management, evidence management, and compliance reporting.

INDUSTRIAL PRINCIPLE

Industrialize the common component, verticalize the context, and assume responsibility in the run phase: this is the combination that transforms AI-driven productivity into sustainable growth. ”



04

Trust, Cybersecurity, and Digital Sovereignty

From a Political Principle to an Operational and Measurable Capability

4.1 The Model of Pragmatic Sovereignty

Digital sovereignty does not coincide with technological self-sufficiency. The most useful definition is an operational one: the ability to govern critical dependencies, protect data and essential functions, maintain continuity, preserve capabilities, and replace components without losing control. The most realistic formulation is national control of critical functions, European-scale strategic capabilities, and selective openness to the global ecosystem.

SOVEREIGNTY PROPORTIONAL TO CRITICALITY

Not every workload requires the same level of control. The degree of sovereignty should be calibrated according to data sensitivity and retention period, the impact of disruption, substitutability, and relevance to national security and strategic interests.



From this perspective, sovereignty is not a property of a single technology, but the result of multiple dimensions that must be governed jointly:

- **Legal:** jurisdictions, sub-processors, audit rights, and extraterritorial access.
- **Data and keys:** data residency, encryption, lineage, training, retention, and control of KMS/HSM systems.
- **Operational:** who administers, monitors, and restores systems, and where capabilities reside.
- **Technological:** portability, standards, APIs, formats, and the substitutability of cloud platforms, models, and agents.
- **Industrial:** where intellectual property, investments, value, and innovation capabilities remain.
- **Cognitive:** control over context, decision-making criteria, and human oversight.
- **Representational:** the ability to make the company's products, capabilities, and certifications recognizable and verifiable by AI systems that influence the choices of customers and buyers.

4.2 The Digital System Integrator as an Orchestrator

Sovereignty is a property of the system as a whole. A locally hosted cloud is not sufficient if cryptographic keys are controlled elsewhere; an open model does not eliminate dependence on compute capacity, toolchains, or expertise; and an exit clause does not guarantee reversibility if data, prompts, embeddings, logs, and configurations are neither exportable nor tested. The Digital System Integrator operates at the points of connection and can translate sovereignty into reference architectures, procurement requirements, transition plans, and continuous verification services.

One operational instrument is the Sovereignty Bill of Materials: an up-to-date map of the critical dependencies of a digital service, including data, models, compute capacity, software, identities, cryptographic keys, suppliers, skills, and recovery procedures. Its purpose is to make visible where control resides and where dependencies on external actors, technologies, or infrastructures exist.

Sovereignty, however, cannot be demonstrated solely through contractual provisions. It must be verified over time through periodic exit tests, designed to assess the actual portability of data and configurations, the substitutability of suppliers, and the ability to restore services in an alternative environment without significant loss of continuity.

This responsibility also extends to cognitive sovereignty: the ability of the enterprise to retain control over the objectives and decisions supported by AI. The Digital System Integrator works alongside management in defining delegations, limits of autonomy, and responsibilities, translating them into operational controls. This entails determining who may modify objectives, which decisions require human approval, and what information must accompany a recommendation. It also entails establishing mechanisms that enable individuals to correct or interrupt the actions of AI systems and ensuring that such interventions remain traceable. Through training and knowledge transfer, the System Integrator helps the client understand the criteria adopted by AI systems, recognize their limitations, and manage exceptions. The effectiveness of training should be assessed through real-world cases and simulations, verifying the ability of individuals to exercise independent judgment. An AI programme should leave the enterprise better equipped to govern its own processes, with people retaining the competence, time, and authority required to intervene: a condition that must be assessed during operation, alongside the performance of the solution itself.



The stewardship of sovereignty does not end with the governance of technologies and decision-making processes within the enterprise; it also concerns the way in which the enterprise is represented in the marketplace. Generative systems increasingly shape search and supplier selection by directly producing responses that include certain companies and capabilities while excluding others. This may disadvantage Italian SMEs and hidden champions, whose reputation is often built upon relationships, expertise, and forms of knowledge that are not readily interpretable by machines. The Digital System Integrator contributes to representational sovereignty by ensuring that information regarding products, capabilities, and certifications is structured, accessible, and verifiable by AI systems, enabling the enterprise's assets and expertise to be recognized without exposing proprietary know-how.

4.3 Cybersecurity and Responsible AI as a Unified Risk System

AI is simultaneously a defensive tool, a new attack surface, and an operational actor. With the emergence of agents, risk shifts from the quality of the response to the correctness and timeliness of the action: data access, privileges, budgets, approvals, rollback mechanisms, and accountability must be native elements of the design. NIST, the AI Act, and ENISA converge on the need for ownership, inventory, evaluation, red teaming, human oversight, incident management, audit trails, and continuous monitoring.

This creates a recurring market for AI assurance: inventory-as-a-service, risk assessment, evidence management, continuous control monitoring, red teaming, compliance reporting, and audit readiness. The advantage of the Digital System Integrator lies in its ability to connect cybersecurity, data, applications, infrastructure, and business processes.



Physical AI and Quantum

High-Integration Frontiers

5.1 Physical AI: AI Enters Physical Operations

Physical AI combines models, perception, robotics, simulation, and control to enable machines and autonomous systems to operate in real-world environments. Italy starts from a significant position: according to the IFR, it is the second-largest European market for industrial robot installations, with 8,783 units installed in 2024.

The new frontier concerns quality control and production-line reconfiguration, intralogistics, maintenance and infrastructure inspection, hospital logistics, and field services.

Maturity should be assessed across three horizons. Today, computer vision, digital twins, cobots, AMRs, edge AI, and enhanced traditional robotics are ready for industrial deployment. In the next phase, adaptive robots, multi-robot systems, and greater autonomy in field services will expand. Further ahead, general-purpose robots and humanoids will emerge; however, the priority should remain on use cases with demonstrable ROI, safety, and integration.

The role of the Digital System Integrator is to bring together business design, digital twins and simulation, robotics, vision and edge technologies, IT/OT integration, safety, cybersecurity, and lifecycle operations. In Physical AI, an error can halt a production line or compromise safety: industry expertise becomes even more decisive.

5.2 Quantum: Selective Experimentation, Immediate Cyber Transition

Quantum technologies will be introduced through hybrid architectures that combine HPC, GPUs, AI, and quantum resources. The industrial objective is not simply to gain access to a QPU, but to formulate the problem, prepare the data, orchestrate the computation, compare classical benchmarks, and integrate the resulting outputs into business processes. Italy's ecosystem of EuroHPC, Leonardo, SOL, and the IT4LIA AI Factory provides a foundation for experimentation and industrial transfer.

The immediate priority, however, is post-quantum cybersecurity. NIST has finalized the first standards, and the European Commission has defined a coordinated roadmap. Cryptographic inventory, classification based on data criticality and retention requirements, post-quantum migration and crypto-agility, pilot initiatives, and wave-based migration all require multi-year programmes.

POSITION

The Digital System Integrator supports its clients in identifying future technological developments and major trends and, above all, in planning their adoption in value-generating areas. The Digital System Integrator therefore also performs a risk management function with regard to security considerations and the impact of technological innovation.



Looking forward

A New Industrial Responsibility for System Integration

AI is profoundly reshaping the economics of Digital System Integration companies. However, the decisive change is not the reduction of technical work; it is the shift of value towards processes, industry expertise, data, trust, and responsibility. Increased productivity becomes an expected condition, while leadership is built on the ability to transform the client's business and to operate that transformation over time.

Vertical expertise is the critical success factor. An agent is useful only if it understands the context, accesses reliable data, complies with rules and roles, and integrates with the systems that govern the enterprise. The same applies to Physical AI, where operational domain knowledge, safety, IT/OT integration, and cybersecurity become integral parts of the architecture.

For Italy, the national Digital System Integrator also assumes a responsibility for digital sovereignty: ensuring that the adoption of AI does not coincide with an uncontrolled transfer of data, capabilities, and decision-making capacity, but rather with a balanced combination of global technologies, European scale, and national control over critical functions.

Italy should concentrate its resources on a limited number of enabling conditions: interoperable and secure data spaces; access to compute resources, AI Factories, and high-performance computing; continuous learning programmes; procurement policies that reward sovereignty, portability, control, and knowledge transfer; and collaboration among enterprises, universities, research centres, and digital operators.

Consistent with the arguments developed throughout this work, national advantage will not depend on replicating global platforms, but on the ability to apply AI to the industries in which the country possesses distinctive capabilities, data, supply chains, and processes.

THREE DIRECTIONS

Verticalize: make industry expertise the primary unit of design.

Industrialize: transform AI-enabled assets and productivity into platforms and managed outcomes.

Consolidate: use partnerships and M&A to accelerate the development of scarce capabilities in Physical AI, cybersecurity, and digital sovereignty.

About the Author

Giuseppe Di Franco leads Lutech, one of Italy's largest players in digital technology and artificial intelligence, with six thousand people across Italy, Spain, and Albania. He drives its growth by combining industrial vision with a concrete focus on results.

A graduate in Management Engineering from Politecnico di Milano in 1992, he devoted his early career to mergers and acquisitions, digital and outsourcing projects across Europe. In 2005 he joined the Siemens Group as Senior Vice President and advanced through international roles, going on to manage over two billion euros in revenue across seventy countries.

In 2013 he took over the leadership of Atos Italia as Chief Executive Officer, quadrupling its revenue, and later assumed global-level responsibilities. In 2023 he designed the acquisition of Atos Italia by Apax: a transformative transaction that led Lutech to become the new, major hub of Italian digital technology, which he now leads as Chief Executive Officer.

Giuseppe Di Franco collaborates with the Politecnico di Milano as an Adjunct Professor at the University's Graduate School of Management, a Board Member of the GSoM, and a Top Influencer Alumnus. He is a member of several associations, including the Ambrosetti CEO Club, Canova, Elis, and Diplomatia, where he also serves on the Board of Directors. In March 2026, Mondadori Piemme published his book Artificial Intelligence for the Future of Italy, which explores AI as a driver of competitiveness for Italy and Europe, with a strong focus on digital sovereignty.

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