

## Aerospace

Aerospace leads Europe in Open Innovation but lags in Al adoption

of Aerospace corporates have collaborated with startups – highest among any industry in Europe

The Aerospace industry stands at the forefront of Open Innovation in Europe, with 92% of companies engaging in startup collaborations — the highest proportion across all sectors, according to Sopra Steria Next's Open Innovation Report 2025.

A total of 73% of Aerospace companies judge Open Innovation as important to their strategy, with the same proportion (73%) consistently achieving their objectives in most collaborations. The sector has also embedded Open Innovation at the highest levels of leadership, with 55% of companies placing responsibility for such initiatives with top management —

again, the top industry in Europe.

Despite this strong track record in Open Innovation overall, Aerospace firms are, in contrast, Europe's least advanced industry for incorporating startup AI solutions into their business. Only 18% have engaged in AI collaborations

Instead, Aerospace companies have prioritised cybersecurity partnerships, with 45% of collaborations focusing on this area, reflecting the sector's highly regulated environment.

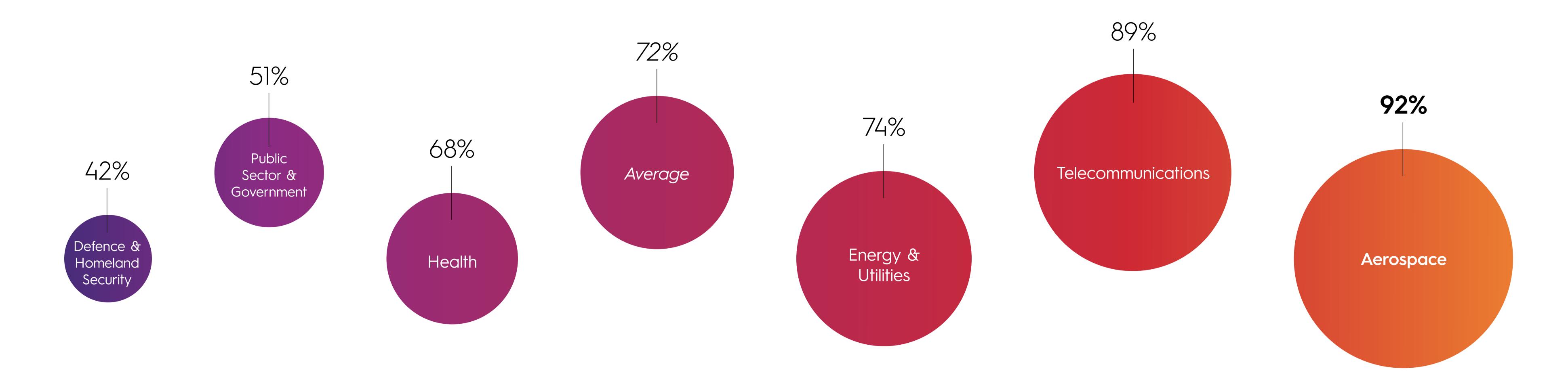
during the last two years — the lowest level among all industries.

75%
of Aerospace
companies judge Open
Innovation as
important to strategy slightly below average

of Aerospace corporates reach their objectives
Always or Most of the Time – second highest level among all industries in Europe

Highest number of corporates to have collaborated with startup

Q: Has your organisation ever collaborated with a startup?
Companies selecting Yes, both Domestic and Foreign Startups, Yes, Domestic Startups and Yes, Foreign Startups.



2. Average level of corporates who judge Open Innovation strategically important

3. Second highest level of successful collaborations

88%
TELECOMMUNICATIONS

60%

DEFENCE & HOMELAND

SECURITY

86% RETAIL

78%

INSURANCE

58%
LEGAL SERVICES

80%
AVERAGE

/S/AEROSPACE

75%
TELECOMMUNICATIONS

SECURITY

20%

DEFENCE & HOMELAND

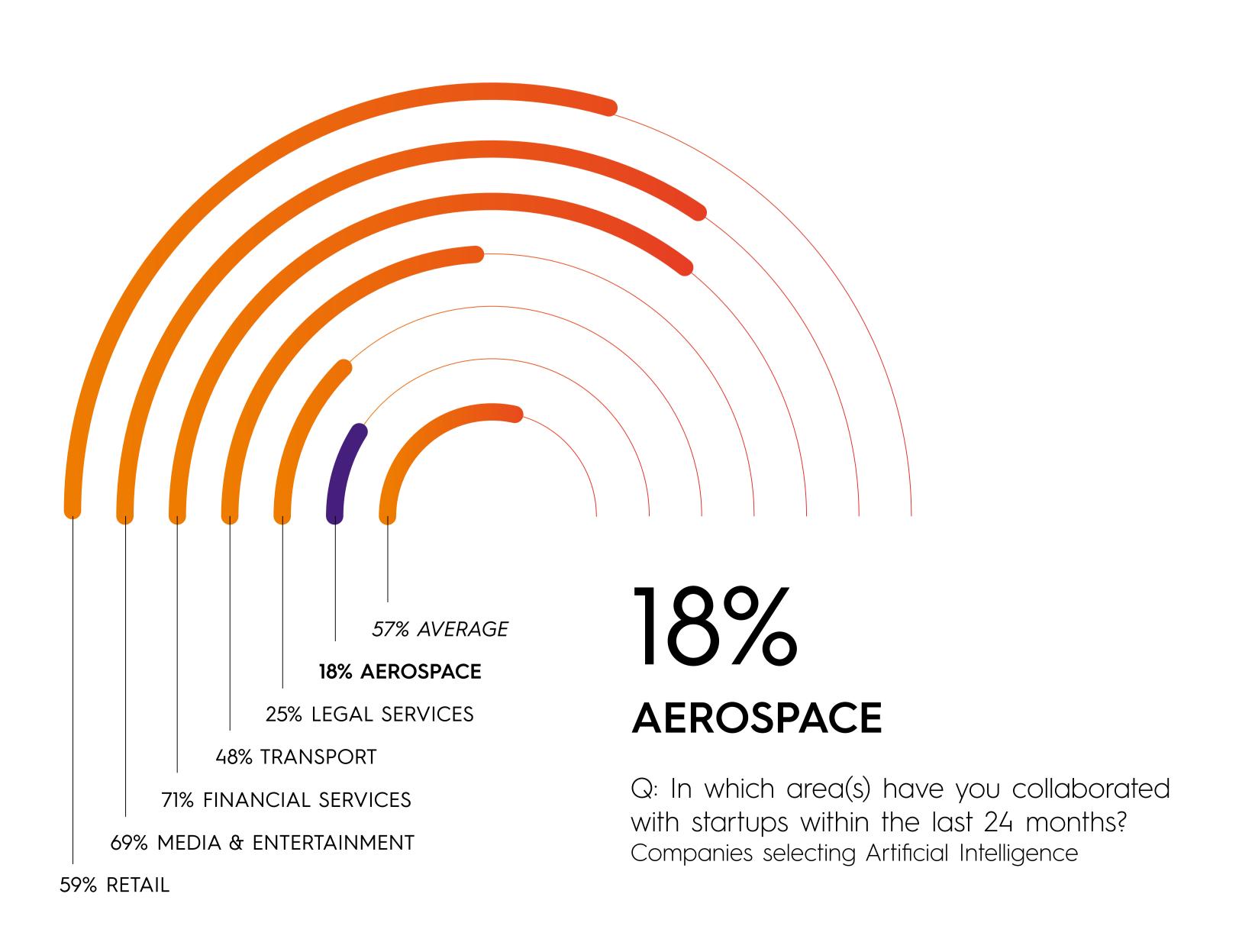
58%
LEGAL SERVICES

65% AVERAGE 73% AEROSPACE

Q: How important is startup collaboration for your organisation's strategy? Companies answering Very Important (Mission Critical) and Slightly Important, but not Mission Critical

Q: Overall, how often in your collaborations with startups did you achieve your objectives? Companies answering Always and Most of the Time.

 $\bigcirc \triangle_{\perp}$  Lowest number of corporates in Europe which have conducted AI projects in the past two years



15. Highest number of corporates to have placed responsibility with top management

52%

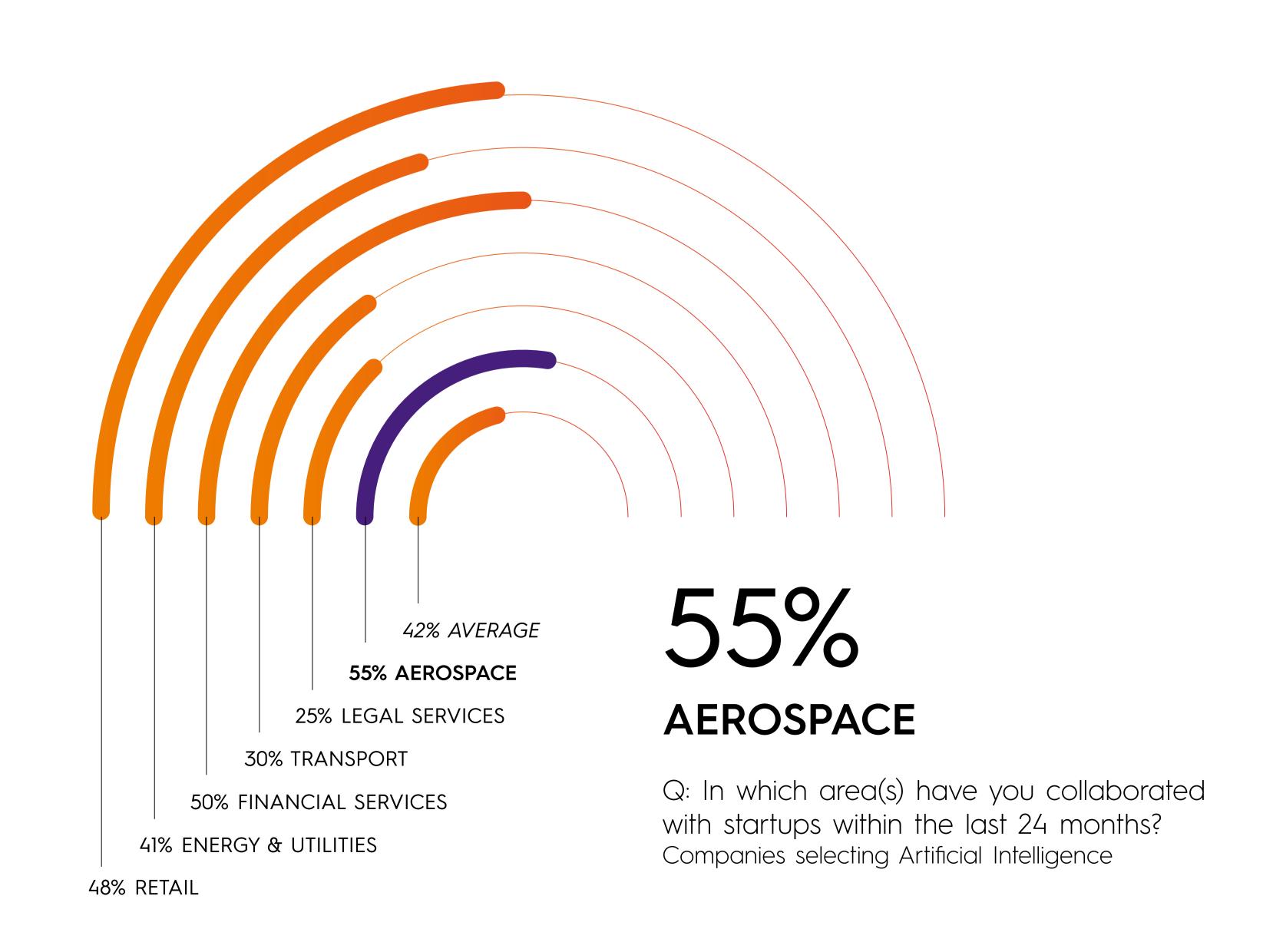
ENERGY &

UTILITIES

60%

PUBLIC SECTOR

& GOVERNMENT





# Defence & Homeland Security

Experimenting with Open Innovation, but successes are yet to materialise

Sopra Steria Next's Open Innovation Report 2025 reveals that just 4 in 10 Defence & Homeland Security organisations have collaborated with startups, and only 20% of their projects meeting their original objectives. 60% of Defence organisations judge Open Innovation as important to strategy, the lowest score across any industry.

Notably, 80% of collaborating organisations started in the past two years. Succeeding in Open Innovation requires structured approaches, and key challenges for organisations in Defence & Homeland Security include the lack of a dedicated department and third-party utilisation. The main barrier to successful collaboration is moving from pilot to implementation, reported by 80% of respondents, followed by intellectual property concerns, reported by 60%. Despite these barriers, 75% of all organisations, whether they have collaborated or not in the past, intend to partner with startups in the next two years.

42%
of Defence & Homeland
Security organisations
have partnered with
startups, making it the
second least engaged
industry in startup
partnerships

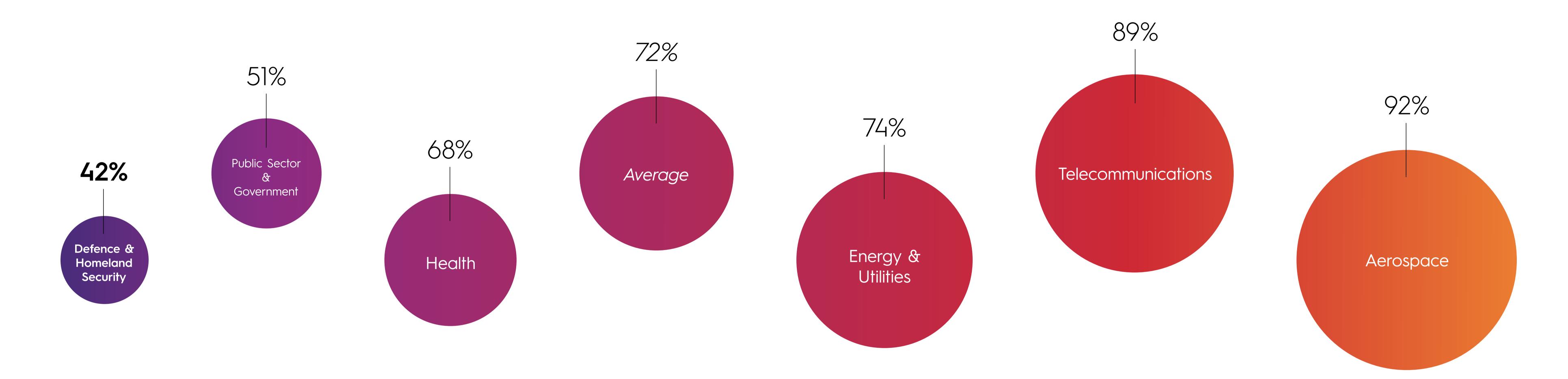
60%
judge Open Innovation
as important to their
strategy, the lowest
score across surveyed
industries

20%
of Defence & Homeland
Security organisations
reach their objectives
always or most of the
time - the lowest level of
success across industries

Lowest number of corporates to have collaborated with startups

Q: Has your organisation ever collaborated with a startup?

Companies selecting Yes, both Domestic and Foreign Startups, Yes, Domestic Startups and Yes, Foreign Startups



2. Second lowest level of corporates who judge Open Innovation to be strategically important

3. Lowest level of successful collaborations

88%
TELECOMMUNICATIONS

73%

AEROSPACE

86%
RETAIL

77%

TRANSPORT

58%
LEGAL SERVICES

80%
AVERAGE

60%
DEFENCE &
HOMELAND SECURITY

75%
TELECOMMUNICATIONS

73%
AEROSPACE

52%
ENERGY &
UTILITIES

60%

PUBLIC SECTOR
& GOVERNMENT

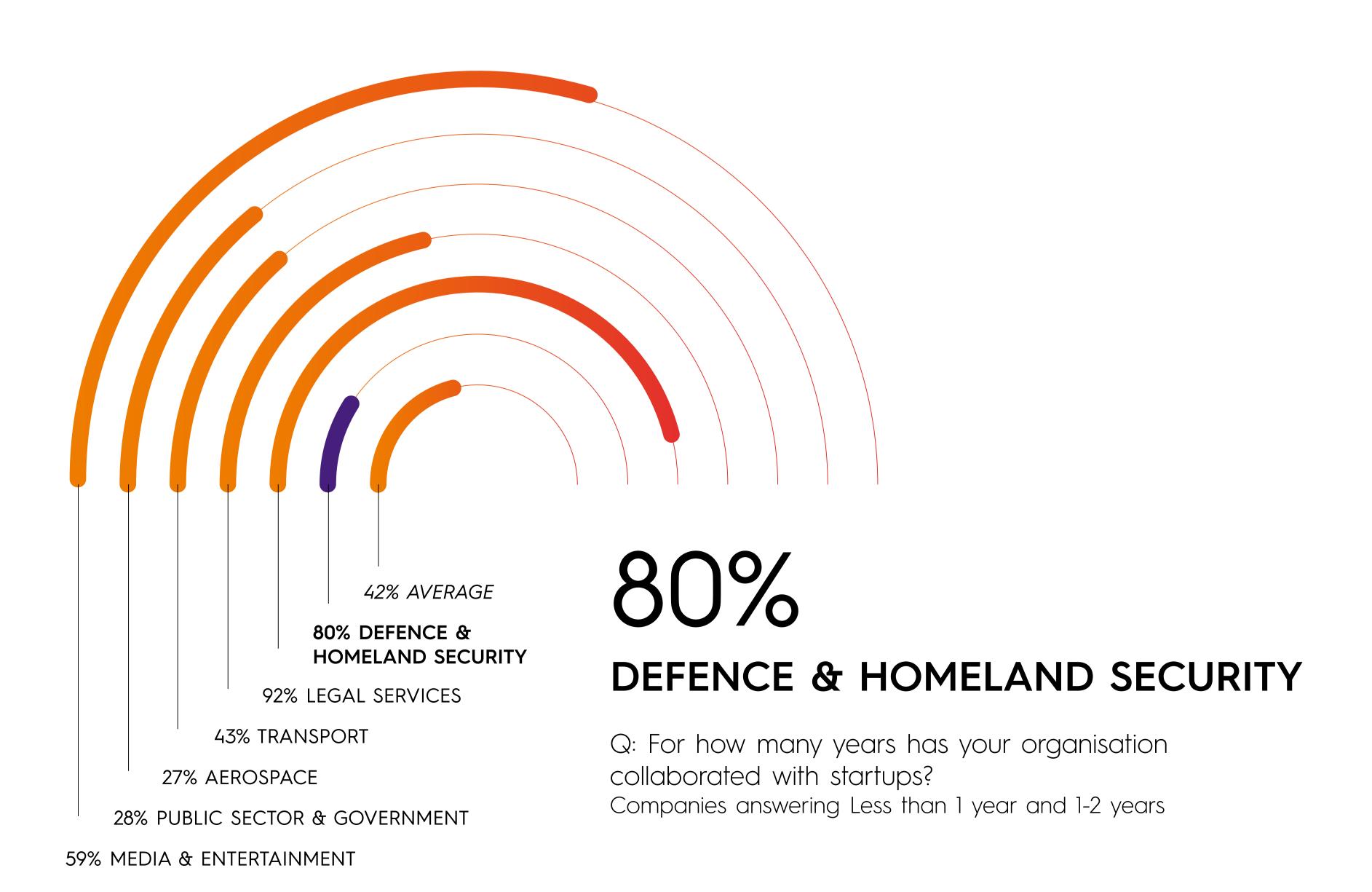
68% HEALTH

65% AVERAGE 20%
DEFENCE &
HOMELAND SECURITY

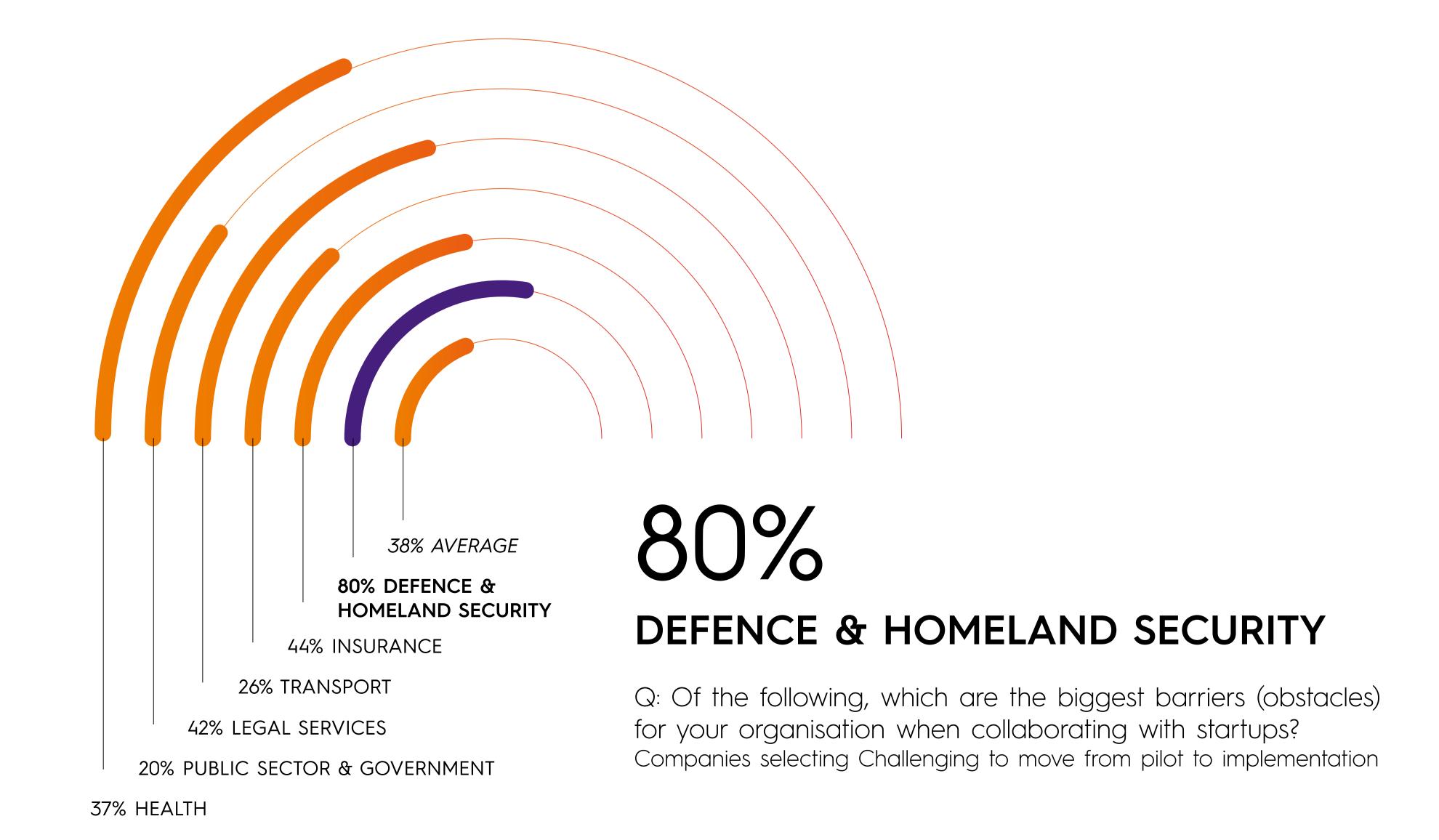
Q: How important is startup collaboration for your organisation's strategy? Companies answering Very Important (Mission Critical) and Slightly Important, but not Mission Critical

Q: Overall, how often in your collaborations with startups did you achieve your objectives? Companies answering Always and Most of the Time.

1 Industry with the second highest level of companies new to Open Innovation



The industry finding it most difficult to move from pilot to implementation





# Energy & Utilities

#### Unlocking Open Innovation with AI startups

Sopra Steria Next's Open Innovation Report 2025 has found that 74% of surveyed Energy & Utilities organisations have engaged in startup collaborations over the past two years. Of these organisations, 80% consider Open Innovation as important to their strategy, in line with the average reported score across sectors. However, Energy & Utilities companies regularly fail to reach their original objectives for their startup collaboration, with only 52% of these projects succeeding.

Despite struggling for results in comparison to other sectors, the organisations who have successfully undertaken AI collaborations have enjoyed significant benefits. 76% of the organisations who have carried out AI collaborations say startups will be crucial for executing their AI strategy, the second highest score of any industry. The benefits of these partnerships have not gone unnoticed, as 74% of organisations that are yet to carry out Open Innovation collaborations are planning on experimenting with startups within the next two years. The Energy & Utilities sector must engage with start-ups quickly or risk falling behind other sectors that are already reaping the rewards from their Open Innovation collaborations.

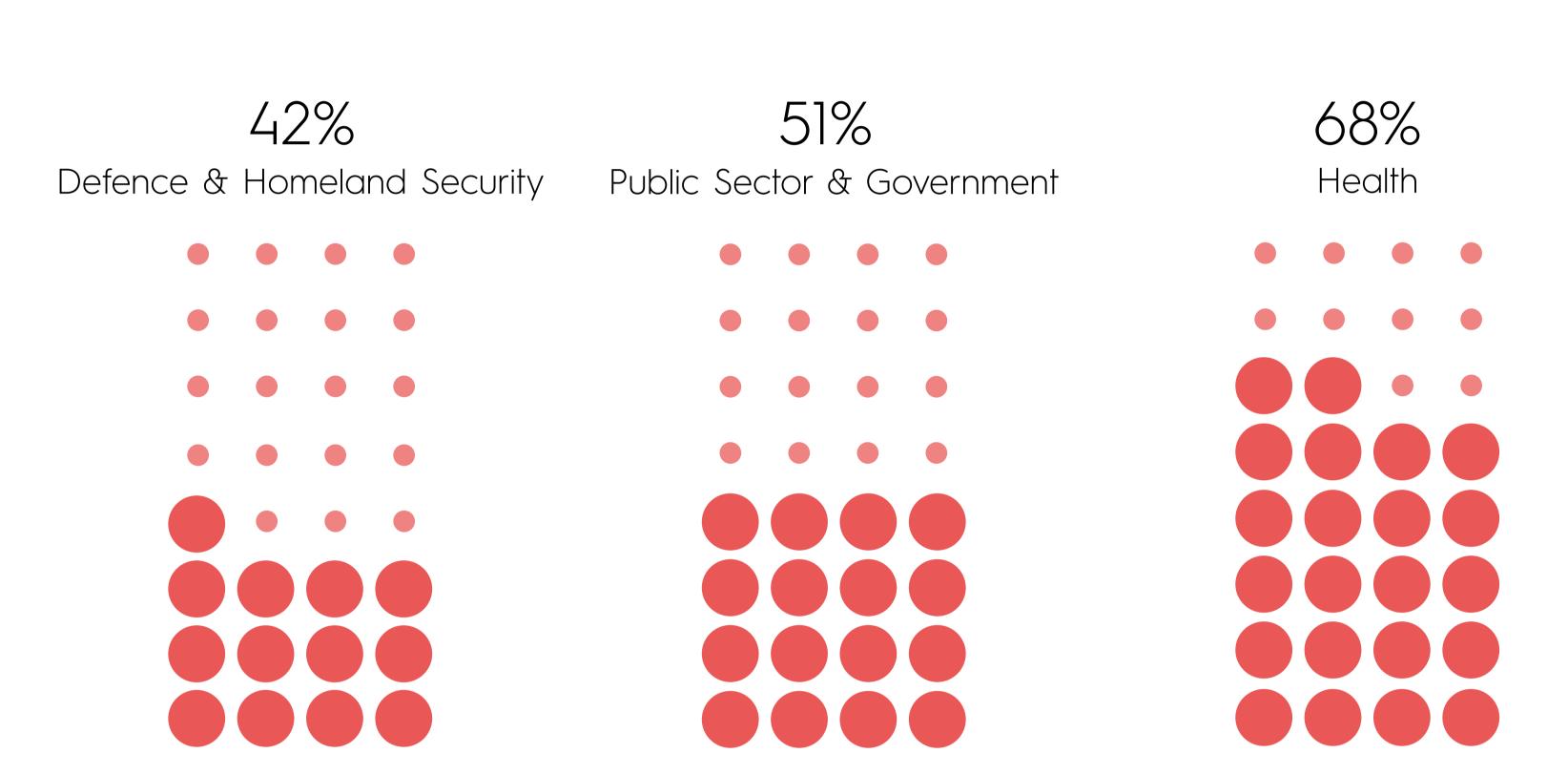
74% of Energy & Utilities organisations have collaborated with startups just above average for all industries

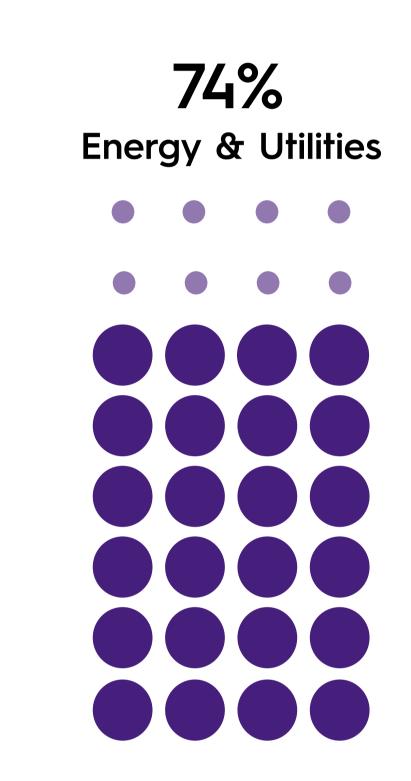
judge Open Innovation as important to strategy - the average for all industries

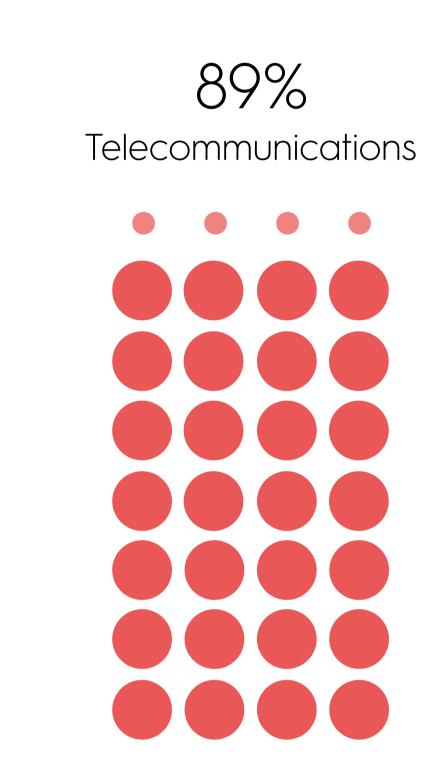
of Energy & Utilities organisations reach their objectives always or most of the time - the second lowest of all industries

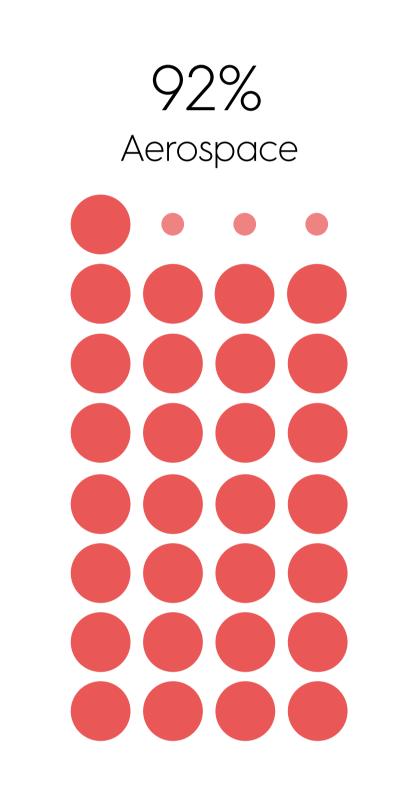
#### Almost three quarters of organisations have collaborated with startups

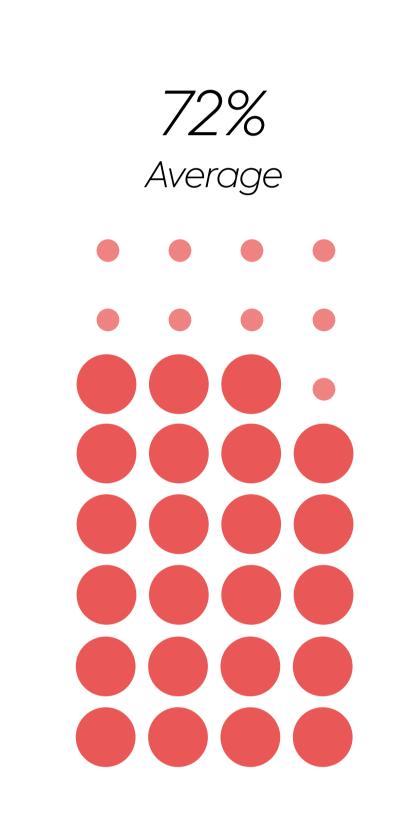
Q: Has your organisation ever collaborated with a startup? Companies selecting Yes, both Domestic and Foreign Startups, Yes, Domestic Startups and Yes, Foreign Startups











#### The overwhelming majority of organisations consider Open Innovation crucial to their strategy

86%	
RETAIL	LE
60%	
DEFENCE &	
HOMELAND SECURITY	

58% EGAL SERVICES

78%

INSURANCE

88% TELECOMMUNICATIONS

> 80% **AVERAGE**

**ENERGY &** 

UTILITIES

Second lowest level of successful collaborations

68%	
HEALTH	
20%	
DEFENSE &	

HOMELAND SECURITY

73% AEROSPACE

60%

PUBLIC SECTOR

& GOVERNMENT

75% TELECOMMUNICATIONS

65% **AVERAGE**  **ENERGY &** UTILITIES

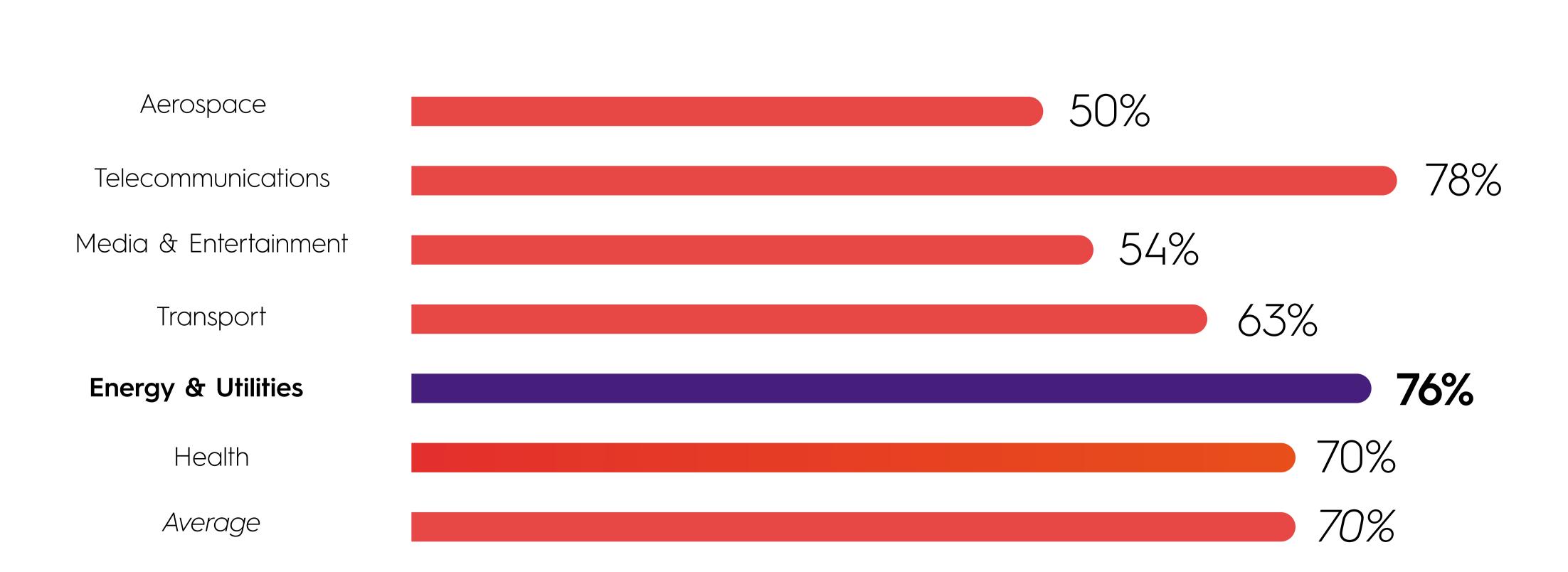
Q: How important is startup collaboration for your organisation's strategy? Companies answering Very Important (Mission Critical) and Slightly Important, but not Mission Critical

Q: Overall, how often in your collaborations with startups did you achieve your objectives? Companies answering Always and Most of the Time

#### Second highest industry

to see startups as important to executing their AI strategy

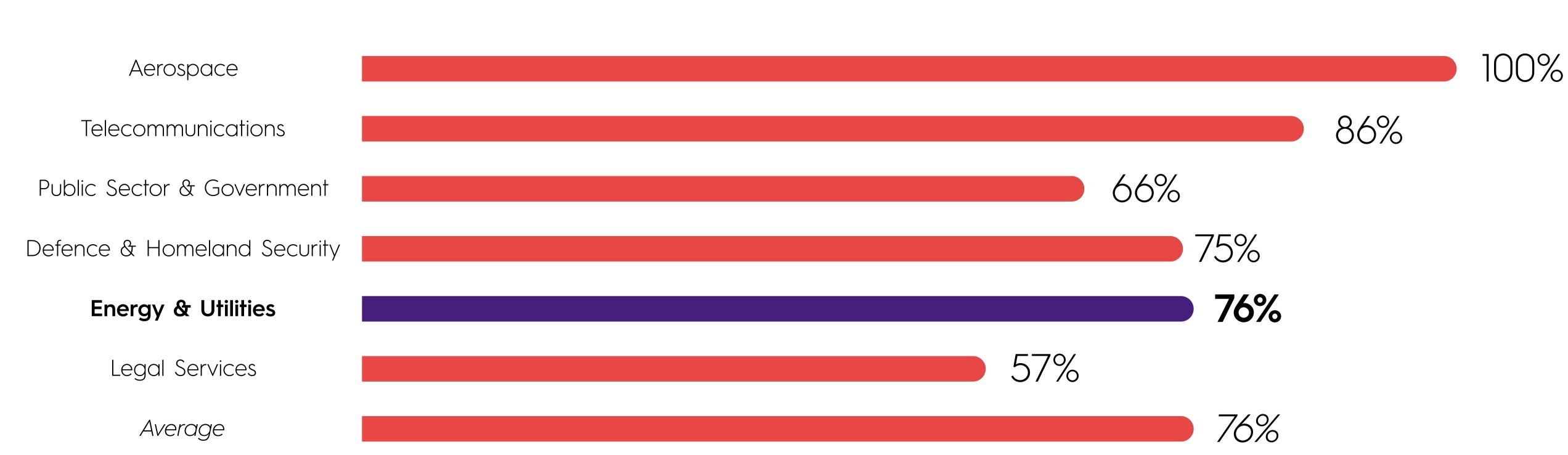
Q: What future role do you see for startups in the ongoing development and implementation of your organisation's AI strategy? Companies answering As key partners in driving innovation and As integral to your AI development process



#### () Majority of organisations are planning future collaborations with startups

Q: Are you interested in (or will you again) collaborate with startups within the next 24 months?

Companies answering Yes





## Financial Services

Financial Services utilises AI startup collaborations to maintain competitive edge

81% of Financial Service corporates have collaborated with startups

According to Sopra Steria Next's Open Innovation Report 2025, the race for AI adoption has spurred significant activity in the Financial Services sector, with Financial Services corporates keen to collaborate with startups to keep up with the rapid pace of development. 81% of surveyed corporates have engaged in startup collaborations in the past two years, the highest rate of engagement of surveyed industries in the report. While the rate of engagement is high, successes can be difficult to drive. The percentage of successful collaboration in Financial Services is around average level, indicating that this sector still has room to improve.

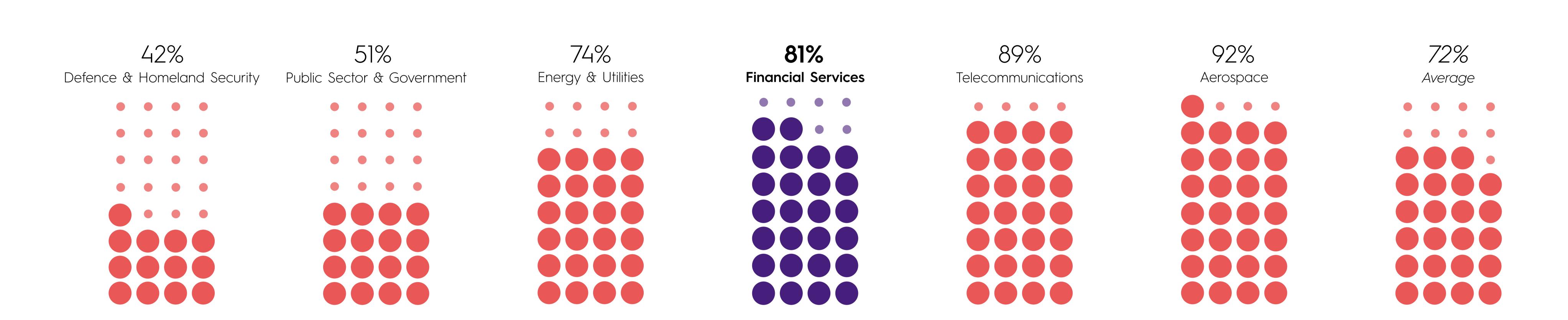
judge Open Innovation as important to strategy - just under average

Financial Services organisations significantly stand out from other industries in their AI efforts. 71% have collaborated with AI startups in the past two years, the most out of any industry. These corporates clearly emphasise the importance of integrating AI into their business operations, as Financial Services corporates are the second most active industry at engaging startups for collaborations, accounting for 34% of such engagements. The race is on, and the fear of missing out is real: 74% the Financial Service corporates who are not collaborating today want to start in the coming years.

Of Financial Services corporates reach their objectives always or most of the time - just over the industrial average

#### Third highest number of corporates to have collaborated with startups

Q: Has your organisation ever collaborated with a startup? Companies selecting Yes, both Domestic and Foreign Startups, Yes, Domestic Startups and Yes, Foreign Startups



#### Average level of corporates who judge Open Innovation to be strategically important

88% 86% 58% TELECOMMUNICATIONS LEGAL SERVICES RETAIL 78% 80% 60% FINANCIAL **SERVICES** INSURANCE **AVERAGE** DEFENCE &

ENERGY & UTILITIES 20%

52%

DEFENSE &

HOMELAND SECURITY

73% AEROSPACE

68%

HEALTH

75% TELECOMMUNICATIONS 65%

**FINANCIAL** 

of successful collaborations

**SERVICES** *AVERAGE* 

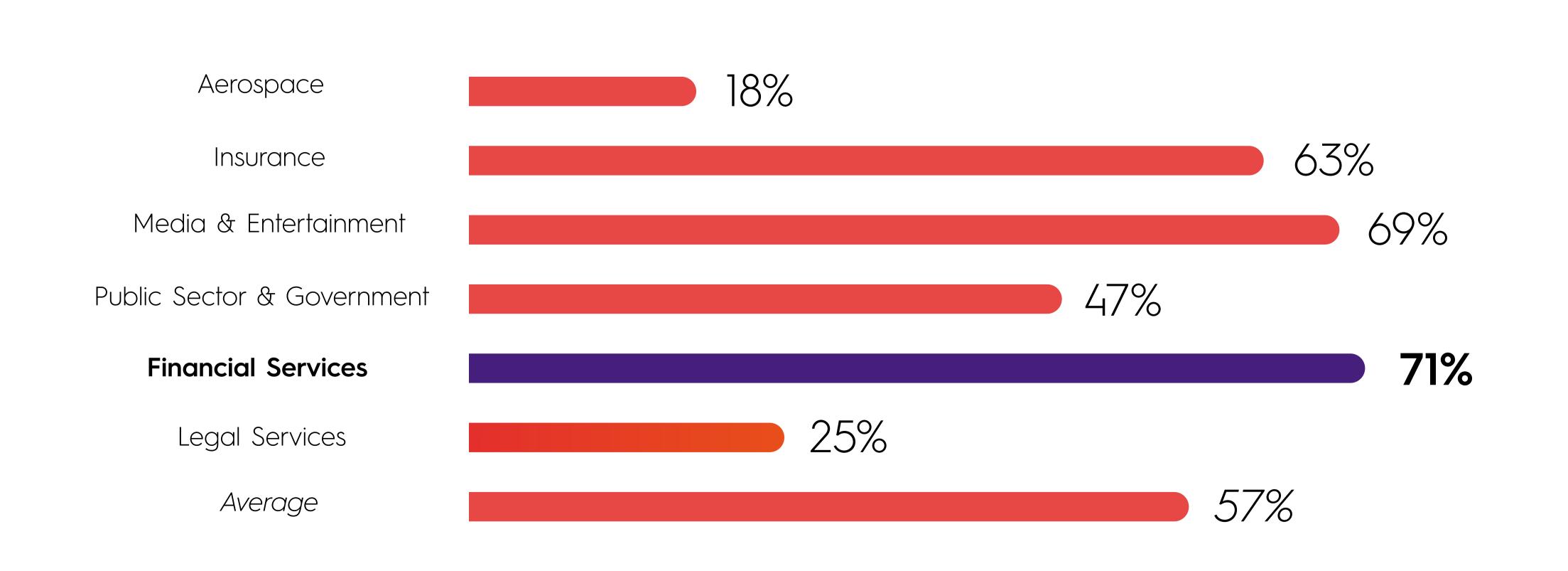
Q: How important is startup collaboration for your organisation's strategy? Companies answering Very Important (Mission Critical) and Slightly Important, but not Mission Critical

#### Q: Overall, how often in your collaborations with startups did you achieve your objectives? Companies answering Always and Most of the Time

#### Highest level of collaboration with Al-startups

HOMELAND SECURITY

Q: In which area(s) have you collaborated with startups within the last 24 months? Companies answering Artificial intelligence (AI)

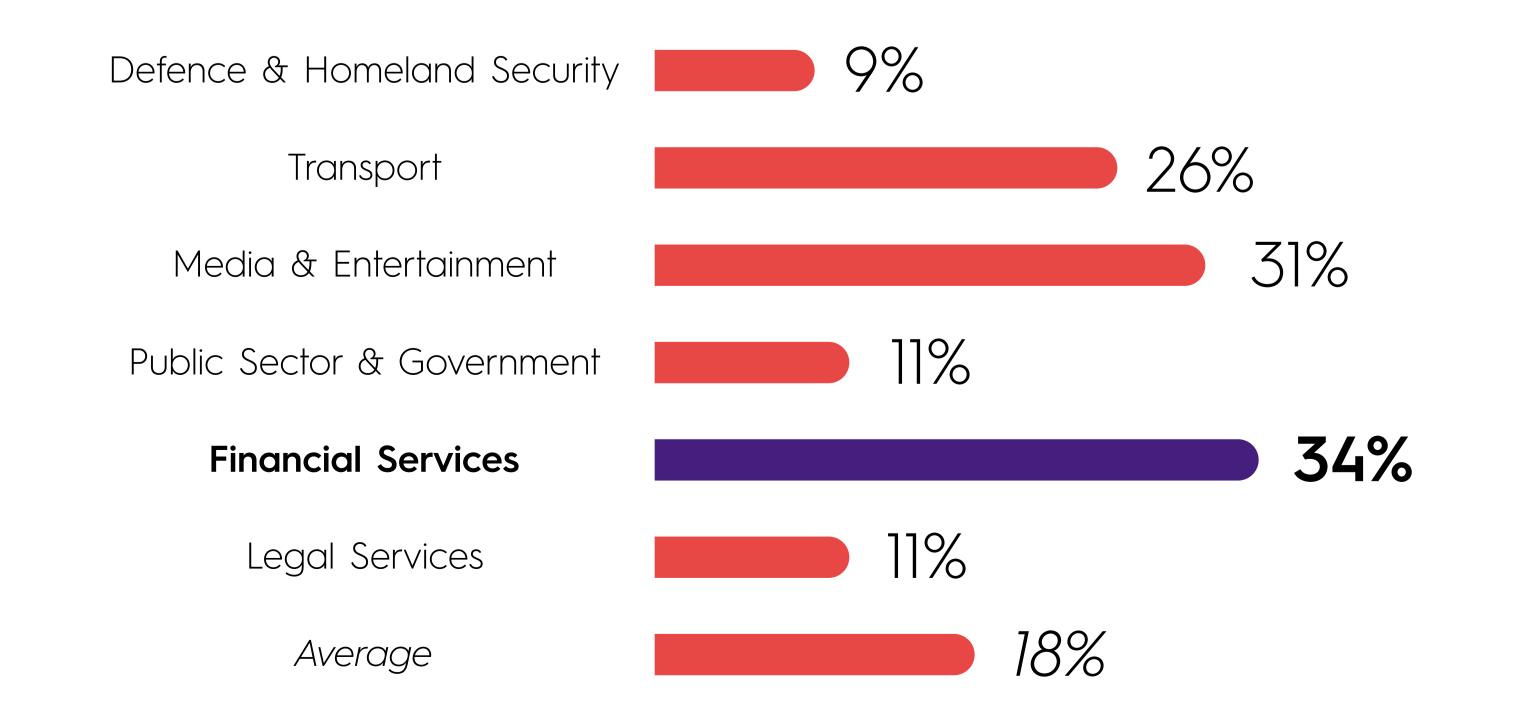


#### Most likely industry

Average level

to approach Al-startups for collaborations

Q: Which industries are most represented among the large organisations that seek AI-related collaborations with your startup? Answered by startups





## Health

Health sector leads in AI startup collaborations to boost capabilities

The Health sector stands out in its determination to partner with AI startups as a means of addressing internal capability gaps.

While most sectors aim to explore new solutions, Health organisations primarily seek access to AI expertise (58%) and to address their lack of internal expertise (34%), which is higher than any other industry.

While only 68% of Health organisations have participated in Open Innovation collaborations in the past two years, 77% consider it crucial to their strategy, according to the findings of Sopra Steria Next's Open Innovation Report 2025.

Of the organisations who have collaborated with startups, 68% achieved the objectives they set out to reach. These results indicate that Health organisations have achieved similar results to other sectors.

These organisations face the dual challenge of bridging expertise gaps and overcoming legal barriers. Notably, 62% of Health organisations already collaborating with AI startups plan to increase their focus in the coming years, more than any other sector.

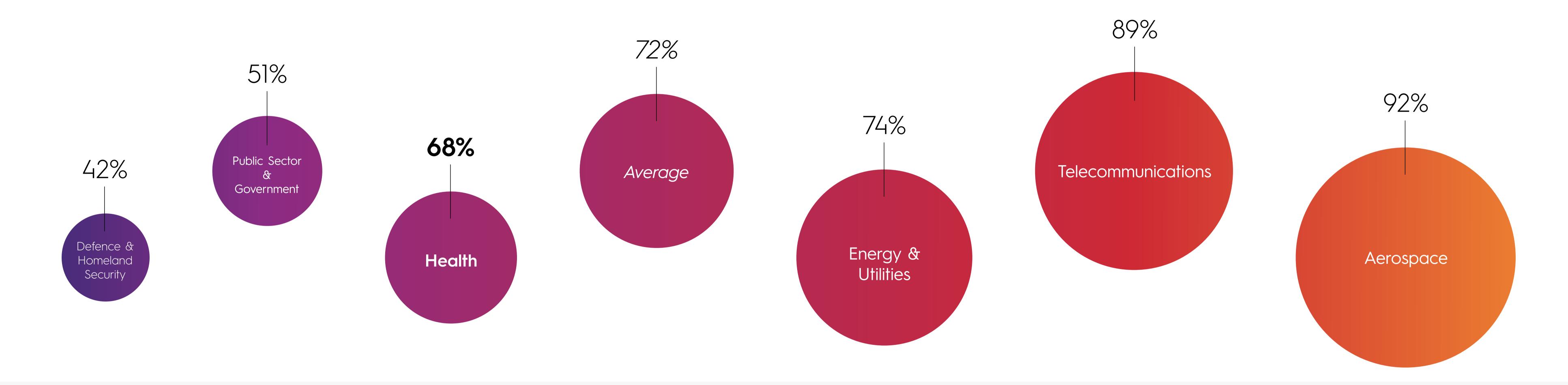
68%
of Health organisations have collaborated with startups – below the average level

Judge Open Innovation as important to strategy – below the average level across industries

66% of Health organisations reach their objectives always or most of the time, above the crosssector average

Average proportion of corporates to have collaborated with startups

Q: Has your organisation ever collaborated with a startup?
Companies selecting Yes, both Domestic and Foreign Startups, Yes, Domestic Startups and Yes, Foreign Startups



2. Average proportion of corporates who judge Open Innovation as strategically important

88% 86% 58% 77% LEGAL SERVICES 77% 80% HEALTH TRANSPORT AVERAGE

Q: How important is startup collaboration for your organisation's strategy?

Companies answering Very Important (Mission Critical) and Slightly Important, but not Mission Critical

3. Average number of successful collaborations

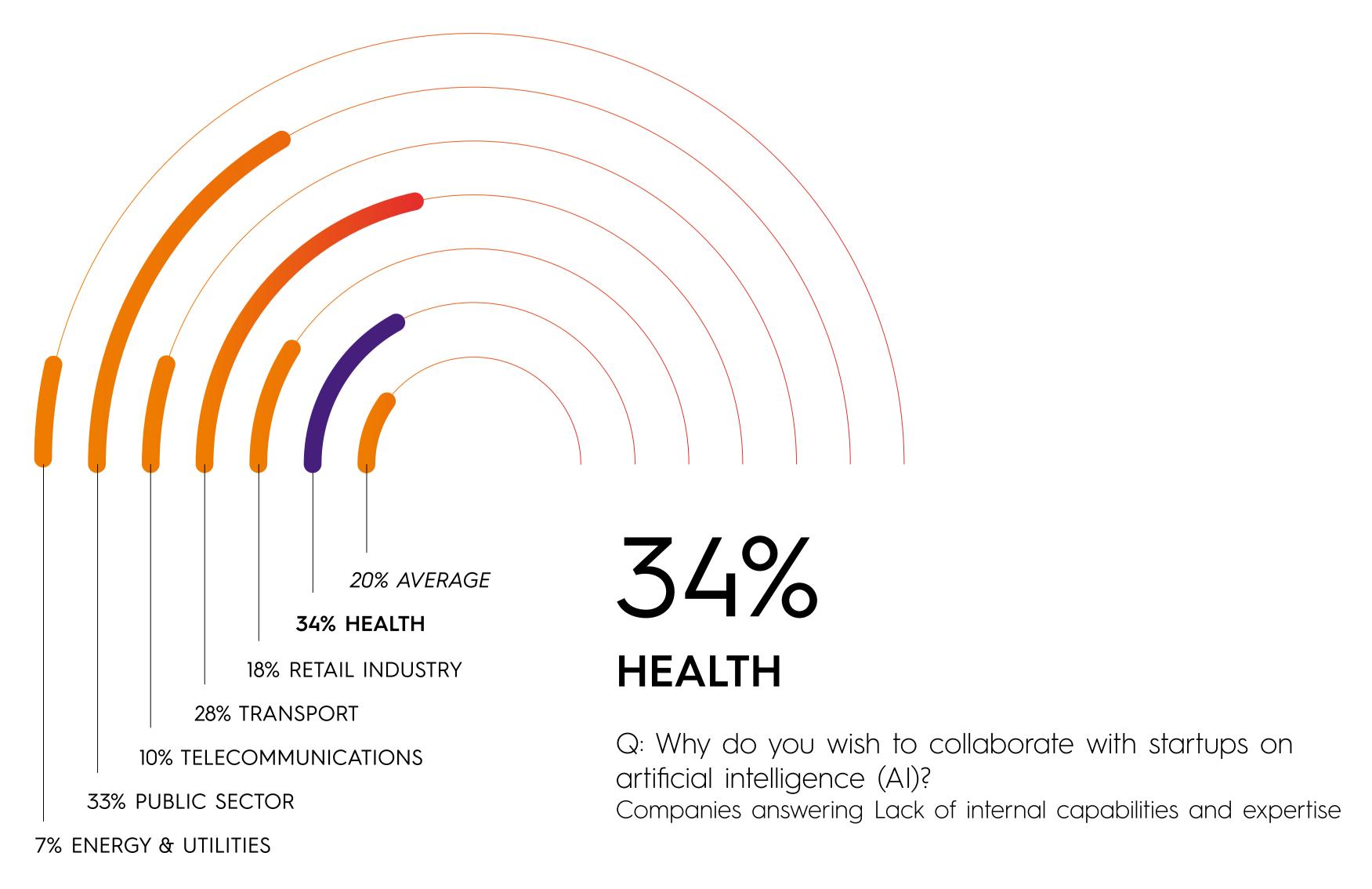
75% 52% 73% AEROSPACE ENERGY & TELECOMMUNICATIONS UTILITIES 20% 60% 65% **HEALTH** PUBLIC SECTOR DEFENCE & HOMELAND **AVERAGE** & GOVERNMENT SECURITY

Q: Overall, how often in your collaborations with startups did you achieve your objectives? Companies answering Always and Most of the Time.

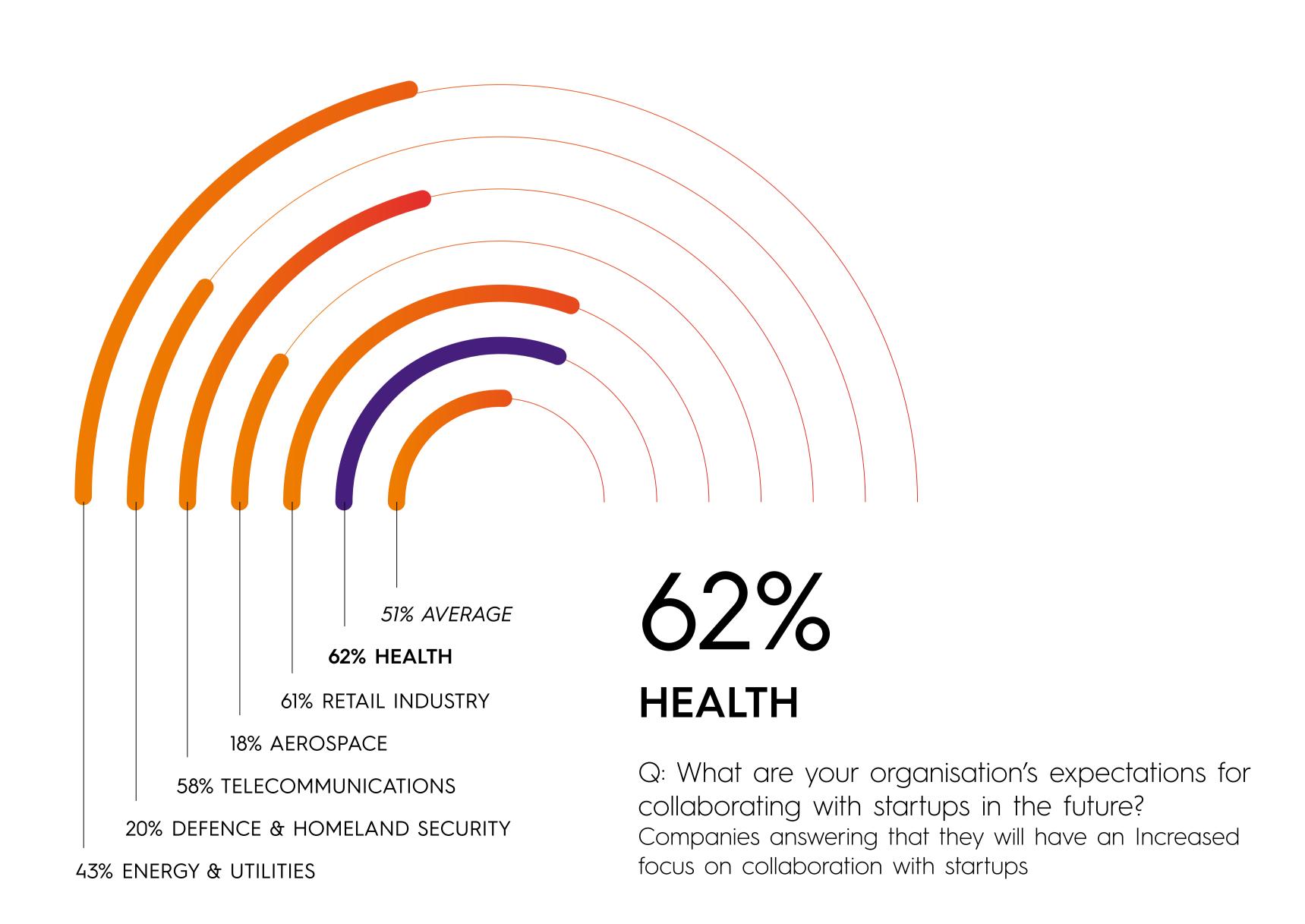
 $\bigcirc 4$ . The industry most likely

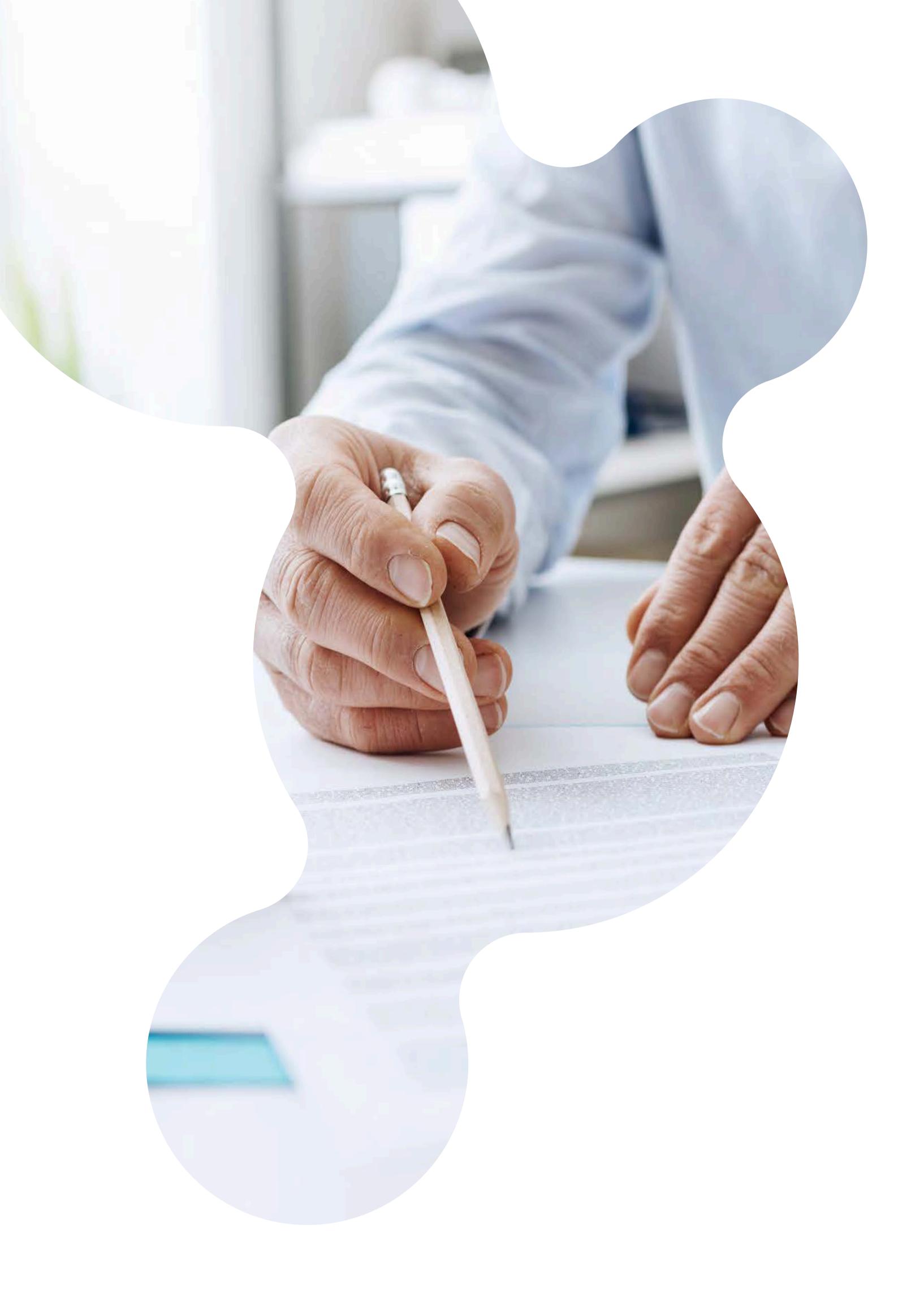
SECURITY

to enter AI collaborations due to a lack of internal expertise and capabilities



The industry to have a highest increased focus on Open Innovation from collaborating organisations





### Insurance

#### Insurance sector has Europe's longest Open Innovation tradition

With a longer history of Open Innovation than any other industry in Europe, the Insurance sector stands out for its early and sustained commitment to startup collaboration.

Open Innovation has a wide reach in the Insurance sector, with 82% having collaborated in the past two years according to Sopra Steria Next's Open Innovation Report 2025.

They are also some of the most experienced Open Innovation professionals, with 41% of them having collaborated for more than five years, the highest number of any industry. 78% say Open Innovation is important to strategy, but only 59% of projects reach the objectives they set out to do.

So where is it going wrong? Insurance companies experience the experimentation phase (41% of corporates) as the most challenging phase, and the biggest barrier is moving from pilot to implementation (44%).

Even though a high number of these corporates have a dedicated department, (81%, the third highest of all corporates) many corporates have not been able to establish a best practise process for the experimentation phase all the way to implementation, as only 31% have been in contact with a third party, the lowest of any industry.

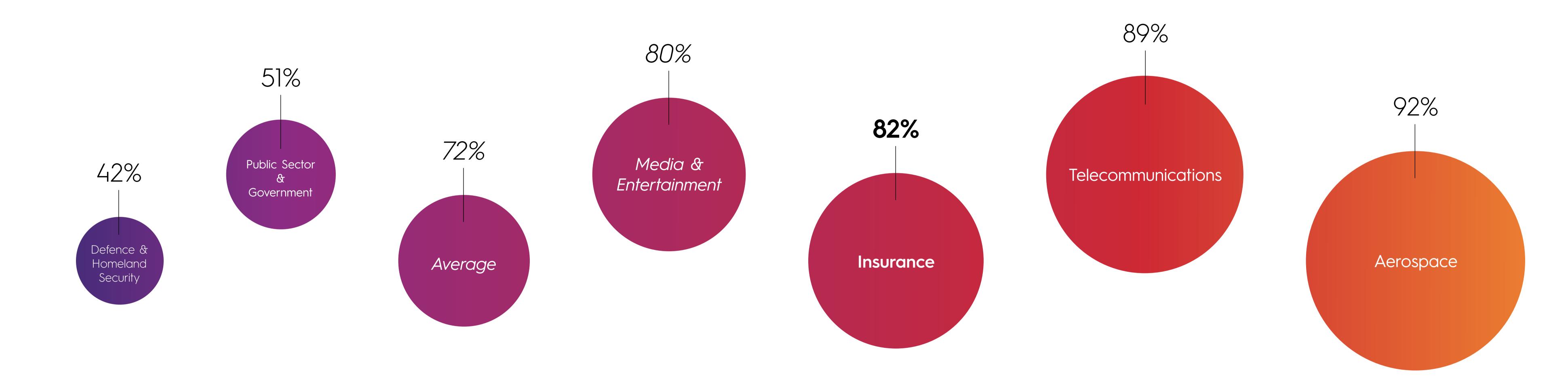
of Insurance corporates have collaborated with startups - third highest across industries

judge Open Innovation to be important to strategy - just below average

59% of Insurance corporates reach their objectives always or most of the time - below average

#### Third highest number of corporates to have collaborated with startups

Q: Has your organisation ever collaborated with a startup? Companies selecting Yes, both Domestic and Foreign Startups, Yes, Domestic Startups and Yes, Foreign Startups



Average level of corporates who judge Open Innovation as strategically important

88% 86% 58% LEGAL SERVICES RETAIL TELECOMMUNICATIONS 79% 60% 80% **INSURANCE** 

**AVERAGE** 

Q: How important is startup collaboration for your organisation's strategy? Companies answering Very Important (Mission Critical) and Slightly Important, but not Mission Critical

FINANCIAL

SERVICES

Average level of successful collaborations

SECURITY

75% 52% 73% ENERGY & TELECOMMUNICATIONS UTILITIES 20% 60% PUBLIC SECTOR DEFENCE & HOMELAND

& GOVERNMENT

AEROSPACE 65% **AVERAGE** 

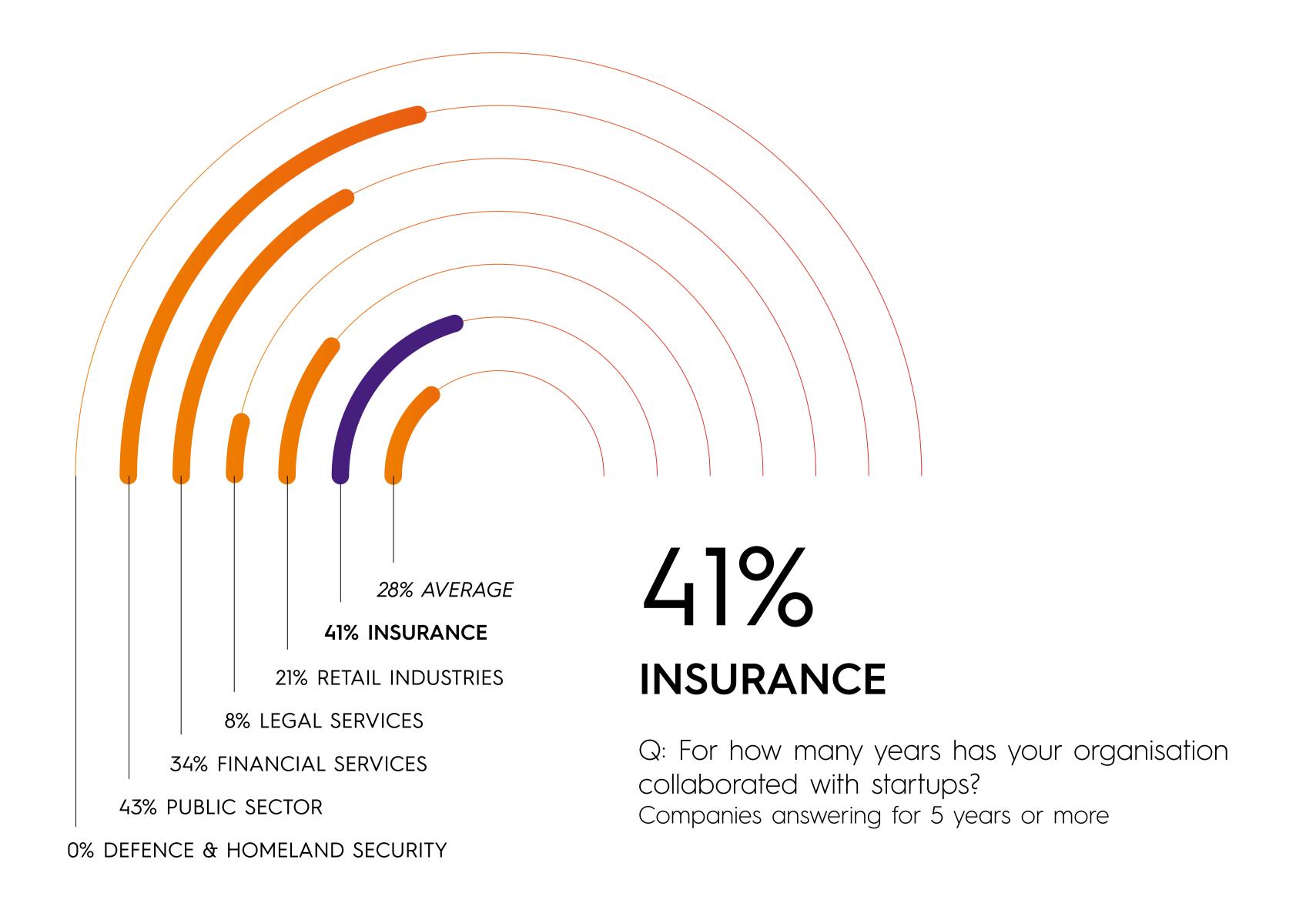
**INSURANCE** 

Q: Overall, how often in your collaborations with startups did you achieve your objectives? Companies answering Always and Most of the Time.

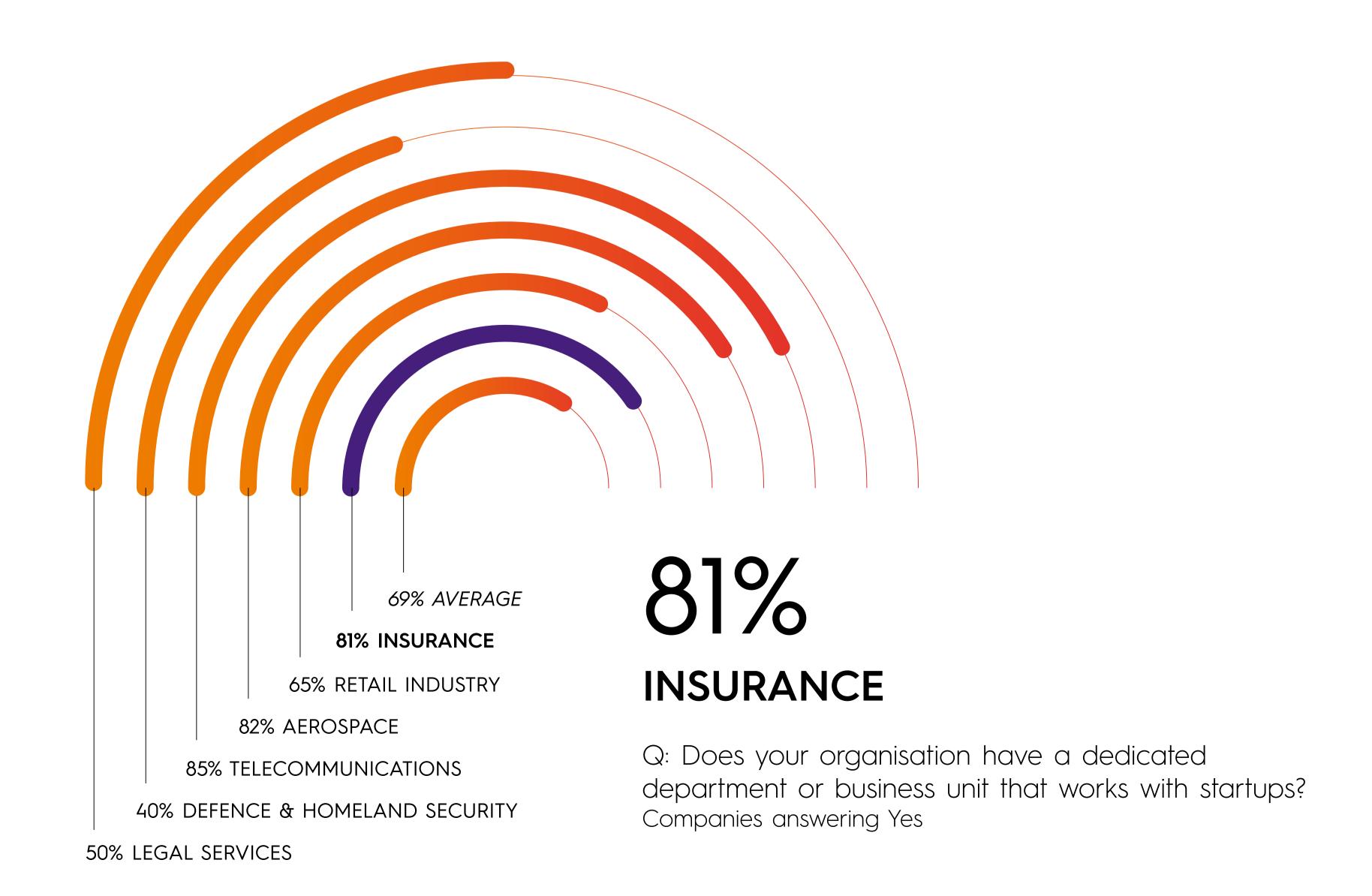
#### Second most experienced industry in collaborating with startups

DEFENCE & HOMELAND

SECURITY



Third highest presence of dedicated startup collaboration departments





## Legal Services

Slow to take advantage of Open Innovation

The Sopra Steria Next's Open Innovation Report 2025 reveals that Legal Services are just beginning to adopt Open Innovation but still have a long way to go. Only 57% of surveyed corporates engaged in such projects over the past two years, ranking third lowest among all examined industries. Moreover, only 58% consider Open Innovation strategically important, the lowest score across all industries, and 58% of projects met their original objectives, the third lowest score across sectors.

Legal Service organisations struggle with key success factors: only 25% place responsibility at top management, they rank second lowest for having a dedicated department (50%), and for having KPIs (29%). This is likely attributed to the fact that 92% of companies have only in the past two years started engaging in Open Innovation projects, meaning they lack the necessary structures for success.

57%
of Legal Services
corporates have
collaborated with
startups, the third lowest
industry score

58%
judge Open Innovation important to strategy the lowest proportion across sectors

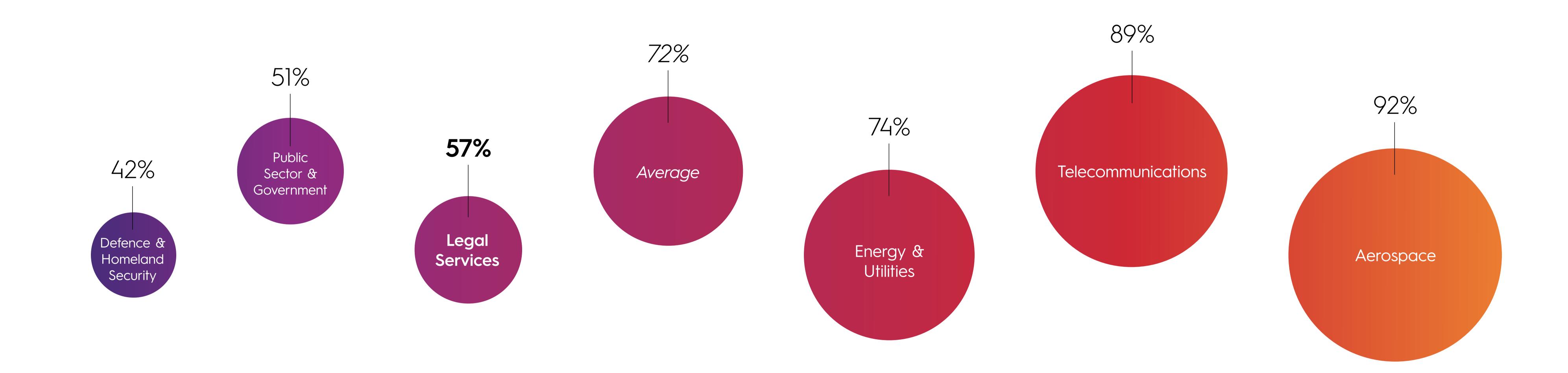
of Legal Services
corporates reach their
objectives always or most
of the time, below the
average score across all
sectors

LEGAL

**SERVICES** 

Third lowest number of corporates to have collaborated with startups

Q: Has your organisation ever collaborated with a startup?
Companies selecting Yes, both Domestic and Foreign Startups, Yes, Domestic Startups and Yes, Foreign Startups.



2. Lowest level of corporates who judge Open Innovation to be strategically important

88% 86% 73% AEROSPACE

60% 78% 80% DEFENCE & HOMELAND INSURANCE AVERAGE

58% LEGAL SERVICES Thirds lowest level of successful collaborations

75%

TELECOMMUNICATIONS

ENERGY & DEFENCE & HOMELAND SECURITY

52%

AEROSPACE DISTRIBUTIONS

52%

AEROSPACE DISTRIBUTIONS

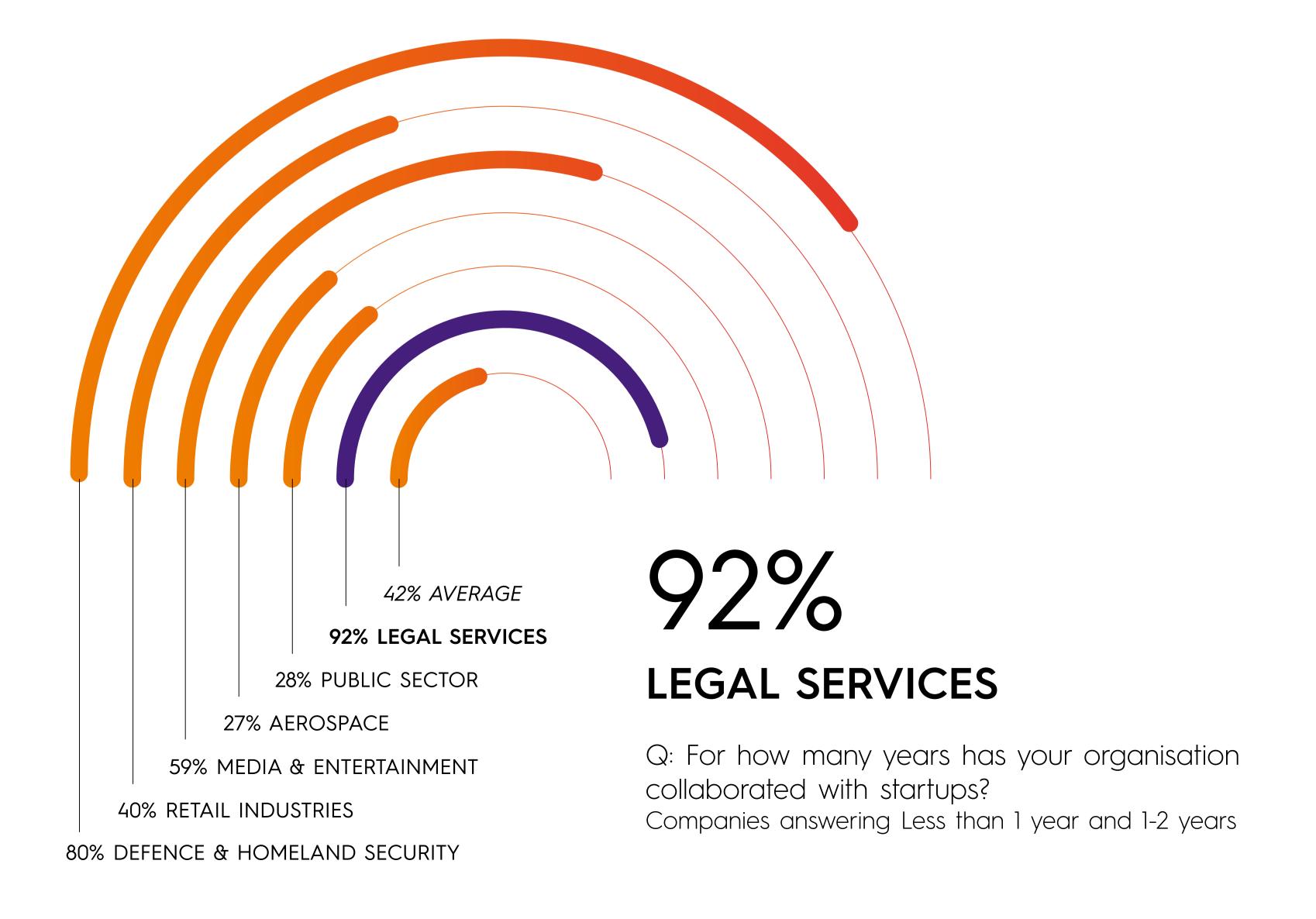
AVERAGE

Q: Overall, how often in your collaborations with startups did you achieve your objectives? Companies answering Always and Most of the Time.

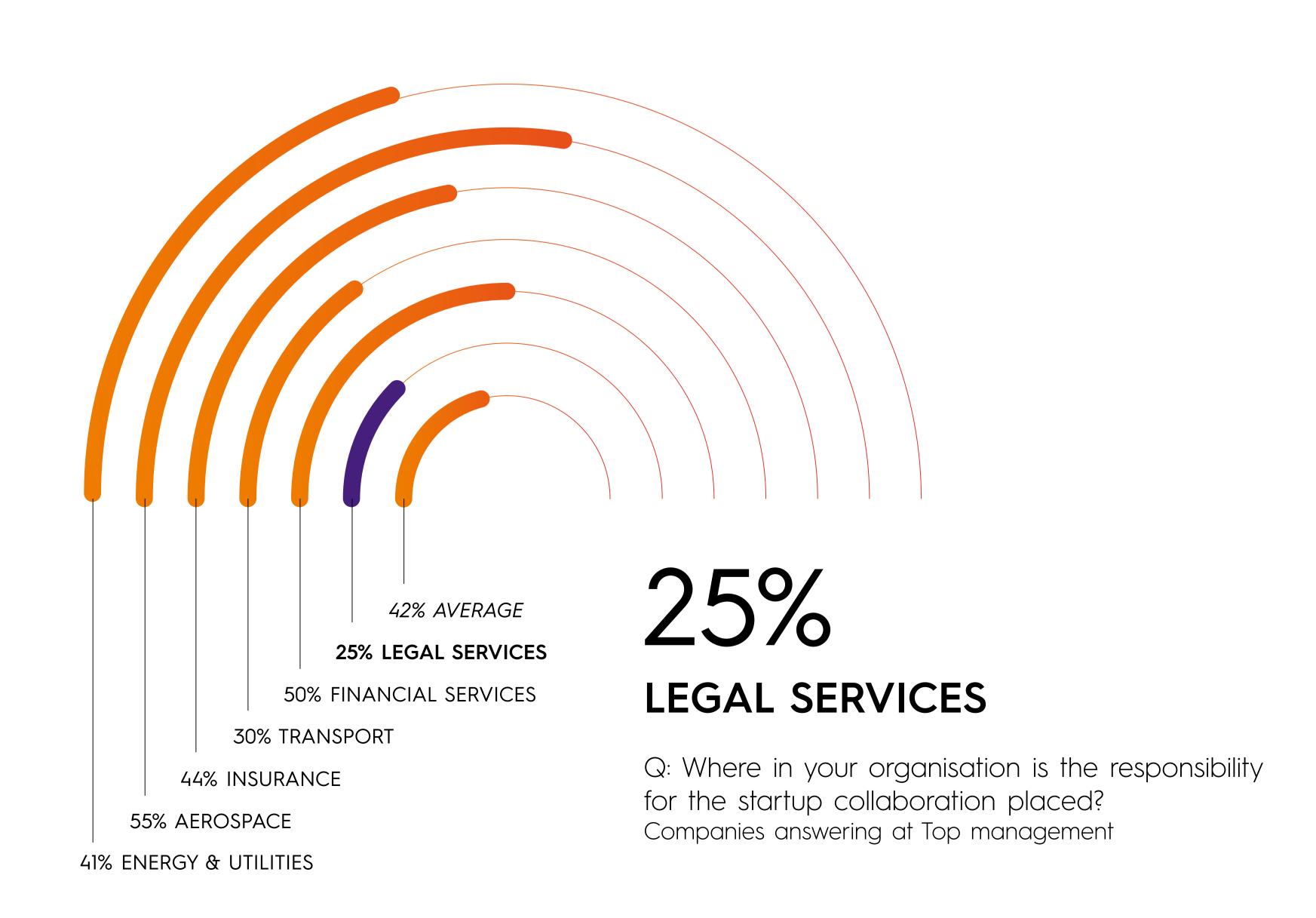
Q: How important is startup collaboration for your organisation's strategy? Companies answering Very Important (Mission Critical) and Slightly Important, but not Mission Critical

 $\bigcirc \triangle$ . Industry with the highest level of companies new to Open Innovation

SECURITY



15. Lowest industry to place responsibility at top management





# Media & Entertainment

Despite popularity in AI collaborations, corporates primarily view startups as occasional partners

Open Innovation is popular in the Media & Entertainment sector, according to the Sopra Steria Next Open Innovation Report 2025. 80% of corporates have engaged in startup collaborations and 74% deem Open Innovation to be important to their strategy. 63% of corporates reach their objectives in their projects, which is just below the cross industry standard.

Media & Entertainment companies are paying close attention to technology trends, as 69% of collaborating companies have done AI projects in the past two years, the second highest across all industries. It does seem, however, that they are not harvesting the value they're searching for. On average, 70% of those who have done AI collaborations say startups will be important in executing their AI strategy. Only 54% of Media & Entertainment companies do, which is the second lowest industry score. When asked about the most challenging phase, these corporates point to finding the right startup as the most difficult, suggesting that they need to pay more attention to the search phase if they are to succeed with utilising startups for the development of their AI offerings and integrations.

80%
of Media & Entertainment
corporates have
collaborated with startups above the average level

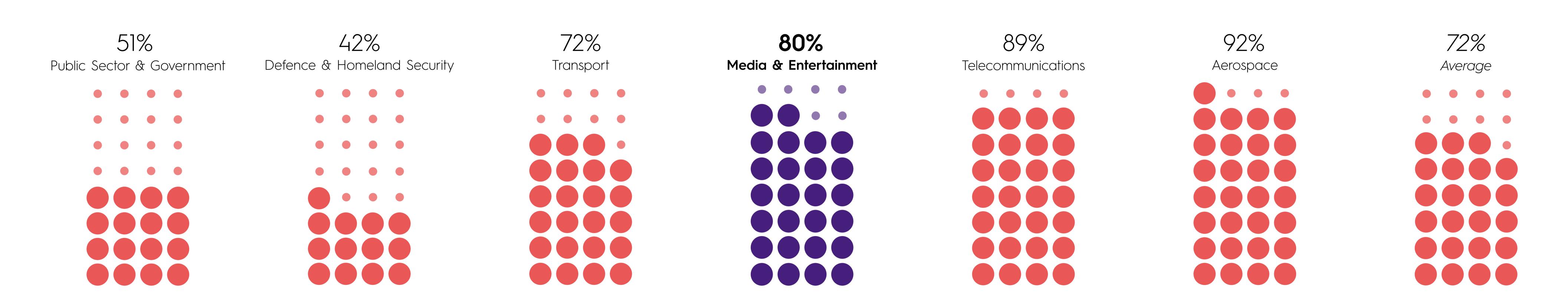
74%

Judge Open Innovation to be important to their strategy - below average

of Media & Entertainment corporates reach their objectives always or most of the time – just below average across industries

Third highest number of corporates to have collaborated with startups

Q: Has your organisation ever collaborated with a startup? Companies selecting Yes, both Domestic and Foreign Startups, Yes, Domestic Startups and Yes, Foreign Startups



2. Average level of corporates who judge Open Innovation strategically important

86% RETAIL 58% LEGAL SERVICES TELECOMMUNICATIONS 74%

82% PUBLIC SECTOR TRANSPORT AVERAGE ENTERTAINMENT

3. Average level of successful collaborations

52% 73% ENERGY & UTILITIES AEROSPACE 20% 68%

68% HEALTH 75%
TELECOMMUNICATIONS

65% AVERAGE

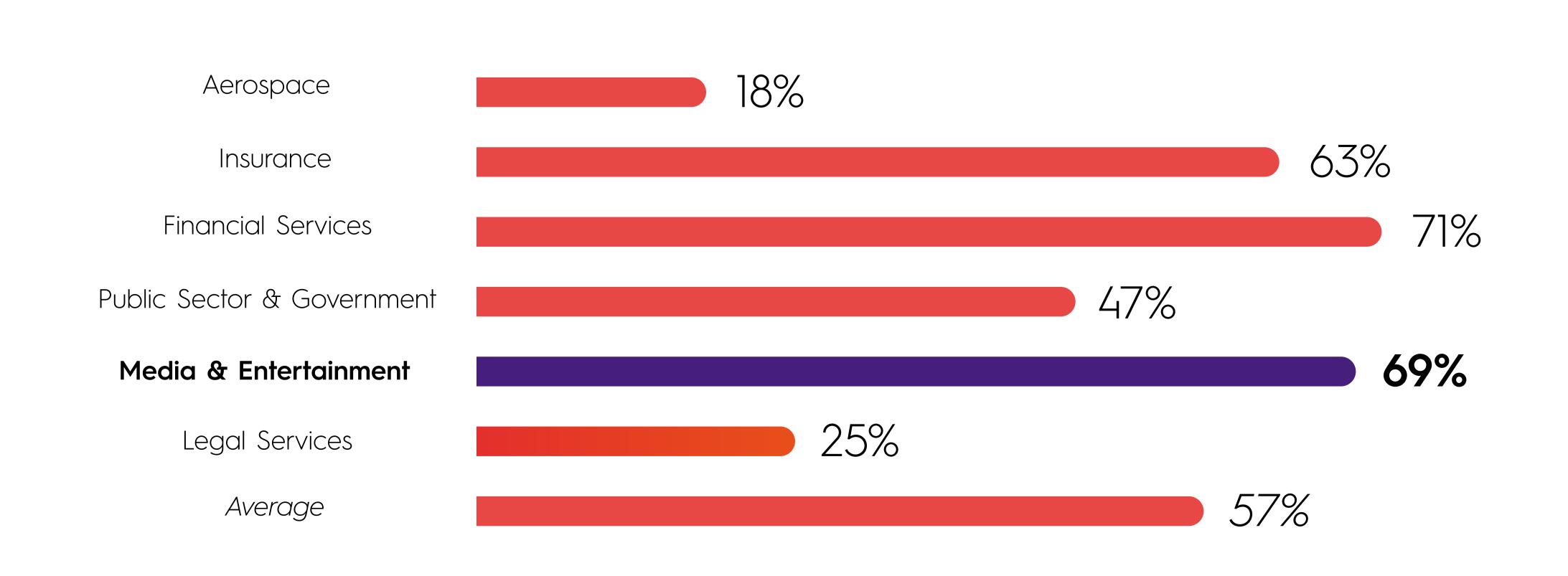
Q: How important is startup collaboration for your organisation's strategy? Companies answering Very Important (Mission Critical) and Slightly Important, but not Mission Critical

Q: Overall, how often in your collaborations with startups did you achieve your objectives? Companies answering Always and Most of the Time

○ ∠ Second highest level of collaboration with Al-startups

Q: In which area(s) have you collaborated with startups within the last 24 months?

Companies answering Artificial intelligence (AI)



Second lowest belief

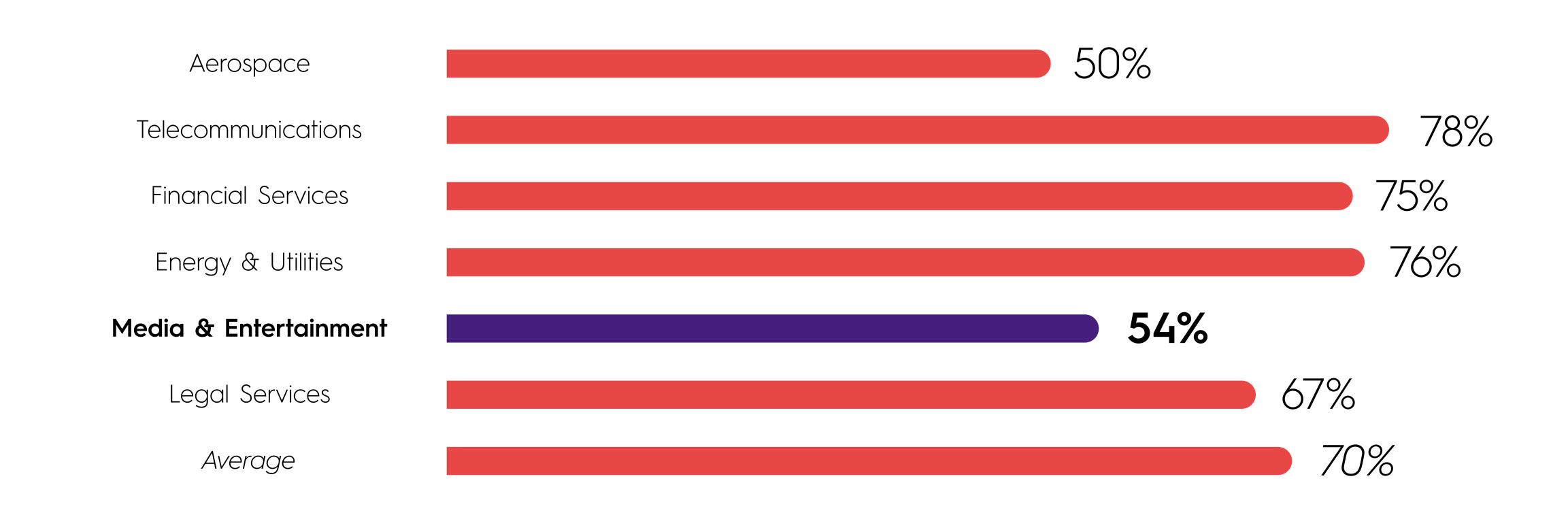
DEFENSE &

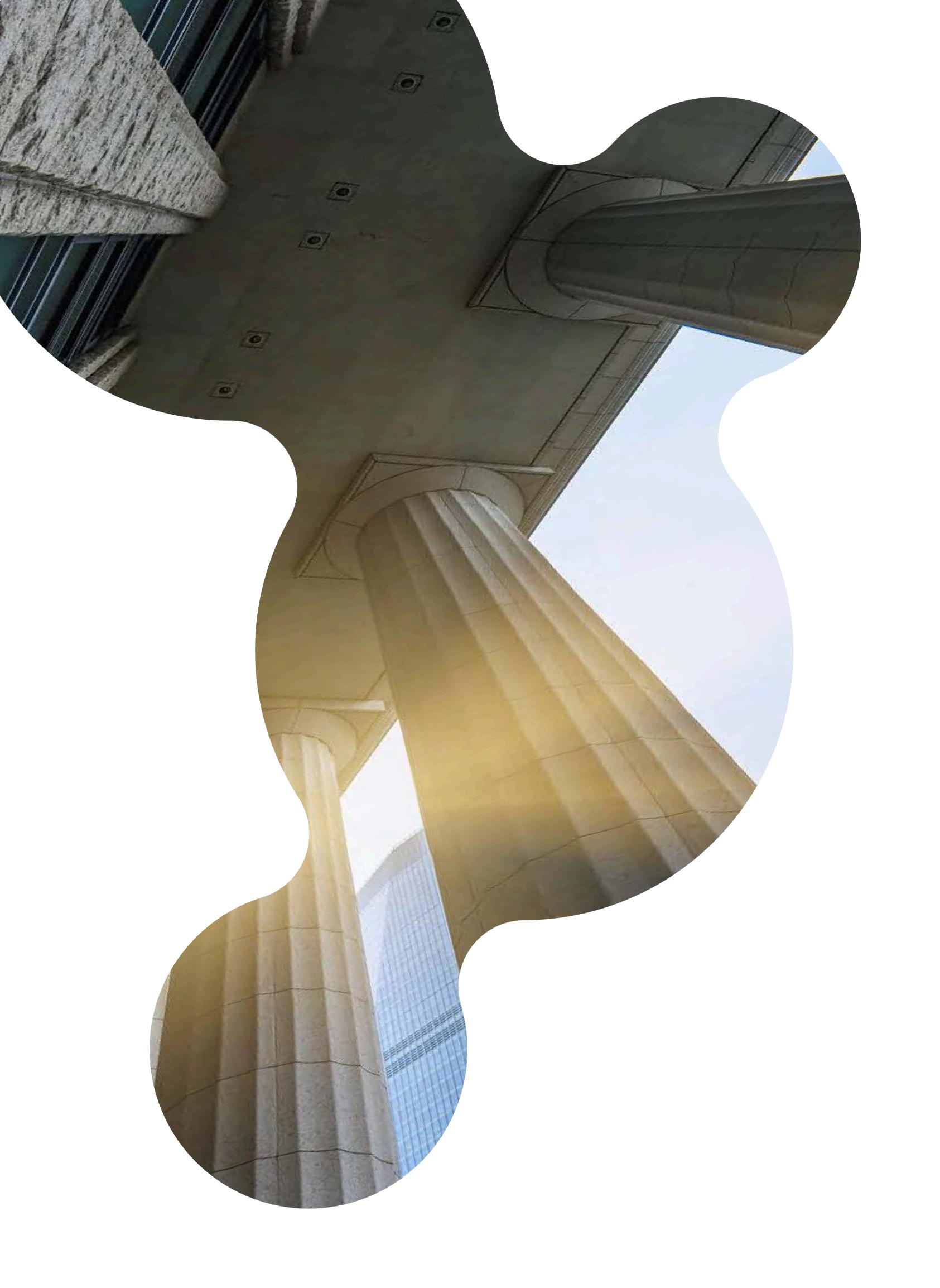
HOMELAND SECURITY

that startups will be crucial in executing AI strategies

Q: What future role do you see for startups in the ongoing development and implementation of your organisation's AI strategy?

Companies answering As key partners in driving innovation and As integral to your AI development process





# Public Sector & Government

Regulatory barriers halt progress for the Public Sector

Public sector & Government organisations are falling behind other industries when it comes to utilising Open Innovation, according to Sopra Steria Next's Open Innovation Report 2025. Only 51% of asked organisations have collaborated with startups, which is the second lowest frequency in any industry. However, those who have collaborated are the most experienced out of any industry, as 43% of these organisations have collaborated for more than five years. 82% of the collaborating organisations deem it important to strategy, which is the third highest industry, and 60% of them say they reach their objectives, which is below average.

Few public agents have dedicated departments, only 56%, and the most crucial barrier is legal and regulatory constraints, experienced by 60% - the highest of any industry. Strict interpretations of procurement regulations halt collaborations with startups, which they need to overcome in order to reach their strategic ambitions

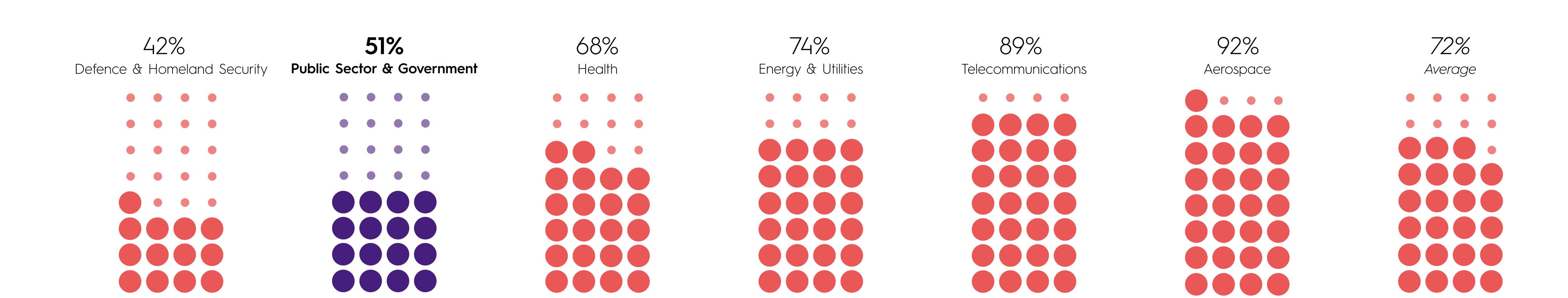
51%
of Public Sector &
Government organisations
have collaborated with
startups – the second
lowest level across
industries

82%
judge Open Innovation
to be important to
strategy - the third
highest level

60%
of Public Sector &
Government organisations
reach their objectives
always or most of the
time – below average

Second lowest level of organisations to have collaborated with startups

Q: Has your organisation ever collaborated with a startup? Companies selecting Yes, both Domestic and Foreign Startups, Yes, Domestic Startups and Yes, Foreign Startups



2. Moderate level of organisations who judge Open Innovation strategically important

86% 58% LEGAL SERVICES TELECOMMUNICATIONS

60% 77% 80% DEFENCE & HEALTH AVERAGE HOMELAND SECURITY

82%
PUBLIC SECTOR
& GOVERNMENT

3. Average level of successful collaborations

52% 73% ENERGY & UTILITIES AEROSPACE

20%

DEFENSE &

HOMELAND SECURITY

68% HEALTH TELECOMMUNICATIONS

75%

65% AVERAGE

OU/O
PUBLIC SECTOR
& GOVERNMENT

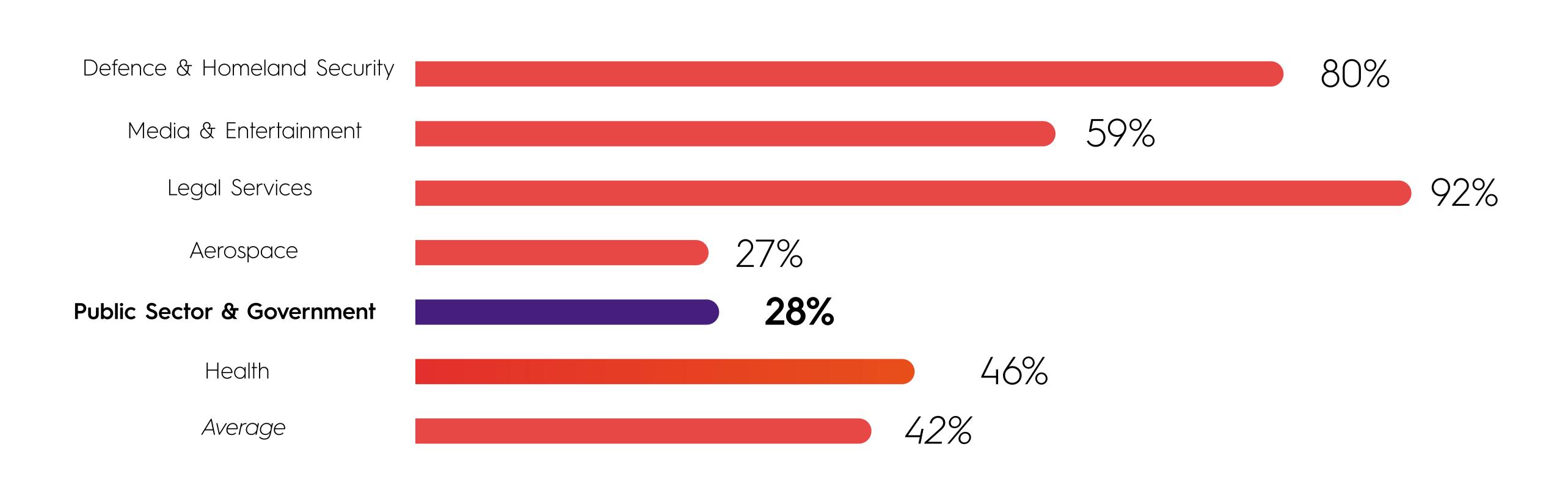
Q: How important is startup collaboration for your organisation's strategy? Companies answering Very Important (Mission Critical) and Slightly Important, but not Mission Critical

Q: Overall, how often in your collaborations with startups did you achieve your objectives? Companies answering Always and Most of the Time

 $\bigcirc 4$ . Industry with the second least amount of new organisations to Open Innovation

Q: For how many years has your organisation collaborated with startups?

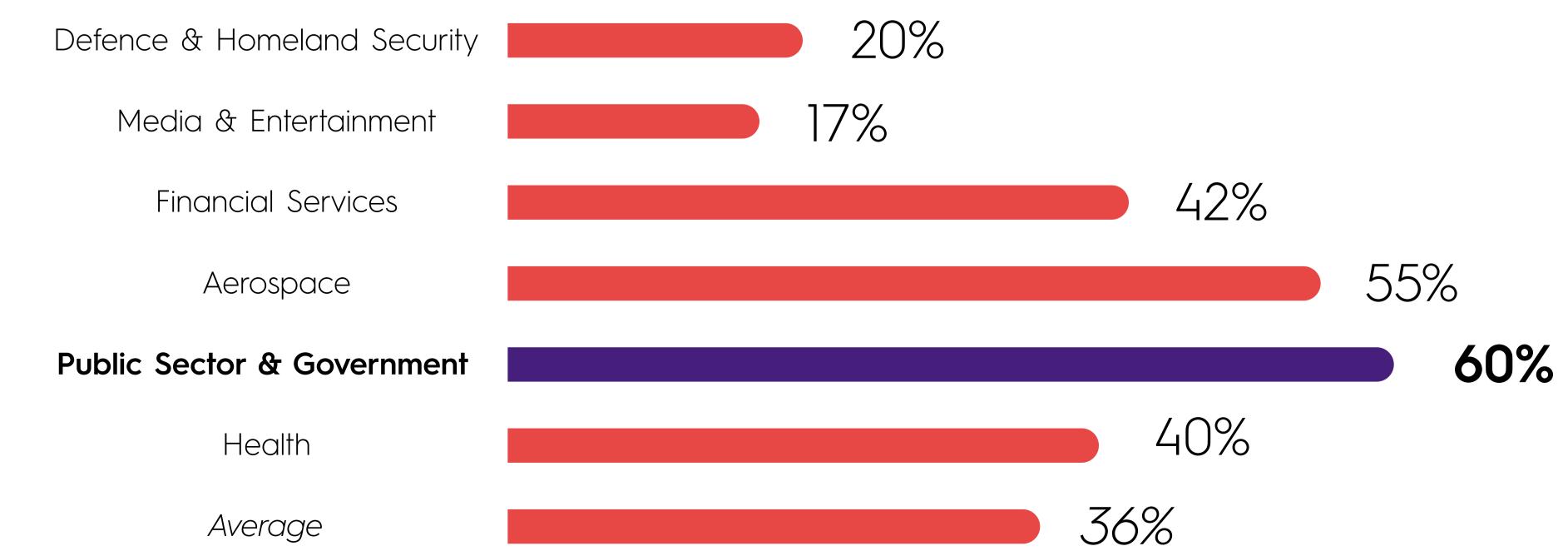
Corporates answering Less than one year and 1 - 2 years



15. The industry that finds regulatory constraints to be the biggest barrier for collaborating with startups

Q: Of the following, which are the biggest barriers (obstacles) for your organisation when collaborating with startups?

Corporates answering Legal and regulatory constraints (e.g., privacy, security, compliance)





## Retail

### Retail players see startups as a tool to boost revenue

According to Sopra Steria Next's Open Innovation Report 2025 the Retail sector is expecting significant results due to Open Innovation collaborations. 74% of Retail companies have carried out startup collaborations in the past two years, and 86% of them deem it important to their strategy, the second highest average for any industry. 70% of them reach their objectives always or most of the time, the third highest average for any industry.

Retail corporates also place higher than average value on Open Innovation, with 48% of corporates placing responsibility for Open Innovation projects with top management. Retail is the only industry to have open innovation revenue contribution (40%) as their most popular KPI. This focus has been successful, with 85% corporates stating they are satisfied with their Open Innovation collaborations thus far.

74% of Retail corporates have collaborated with startups - just above the average rate across sectors

86%

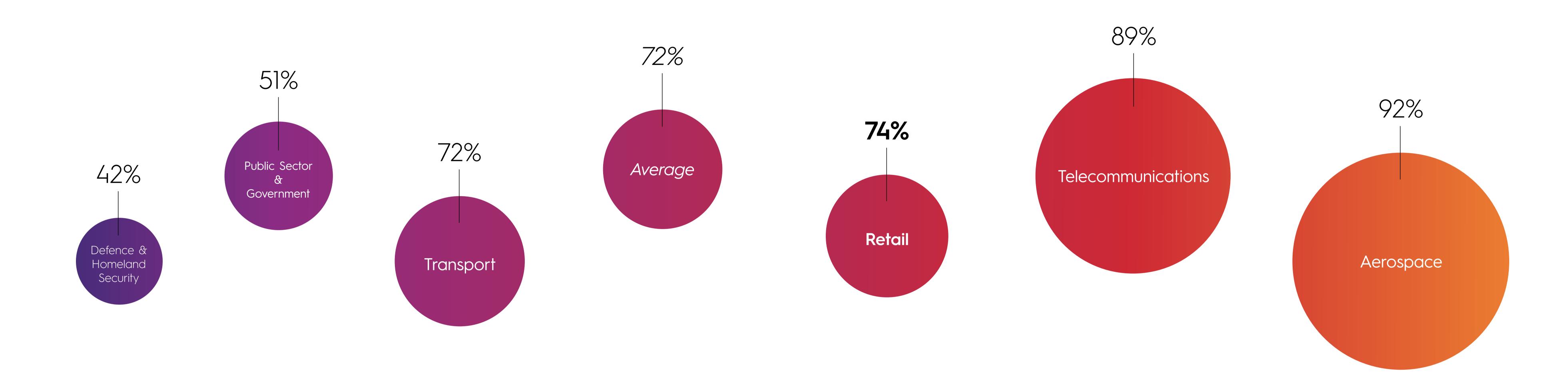
judge Open Innovation to
be important to strategy

- the second highest
rating across industry

of Retail corporates reach their objectives always or most of the time – third most successful industry

Average number of corporates to have collaborated with startups

Q: Has your organisation ever collaborated with a startup?
Companies selecting Yes, both Domestic and Foreign Startups, Yes, Domestic Startups and Yes, Foreign Startups



2. Second highest level of corporates who judge Open Innovation to be strategically important

88%
TELECOMMUNICATIONS

60%

DEFENCE & HOMELAND

SECURITY

77%
TRANSPORT

78%

INSURANCE

58%
LEGAL SERVICES

80% AVERAGE 86%
RETAIL

3. Average level of successful collaborations

75%
TELECOMMUNICATIONS

20%

DEFENCE & HOMELAND

SECURITY

52%
ENERGY &
UTILITIES

68% HEALTH 73%
AEROSPACE

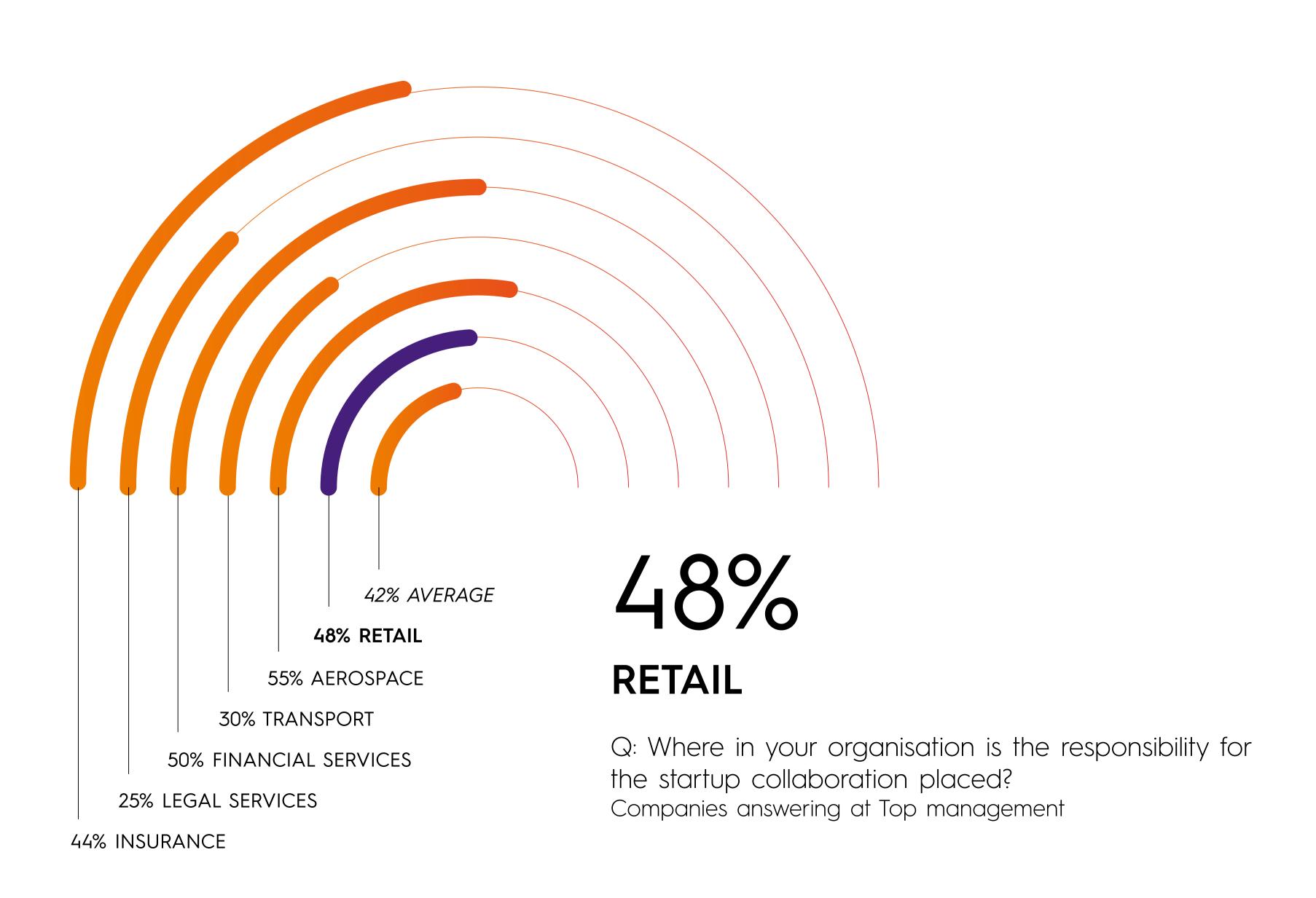
65% AVERAGE 70%
RETAIL

Q: How important is startup collaboration for your organisation's strategy?

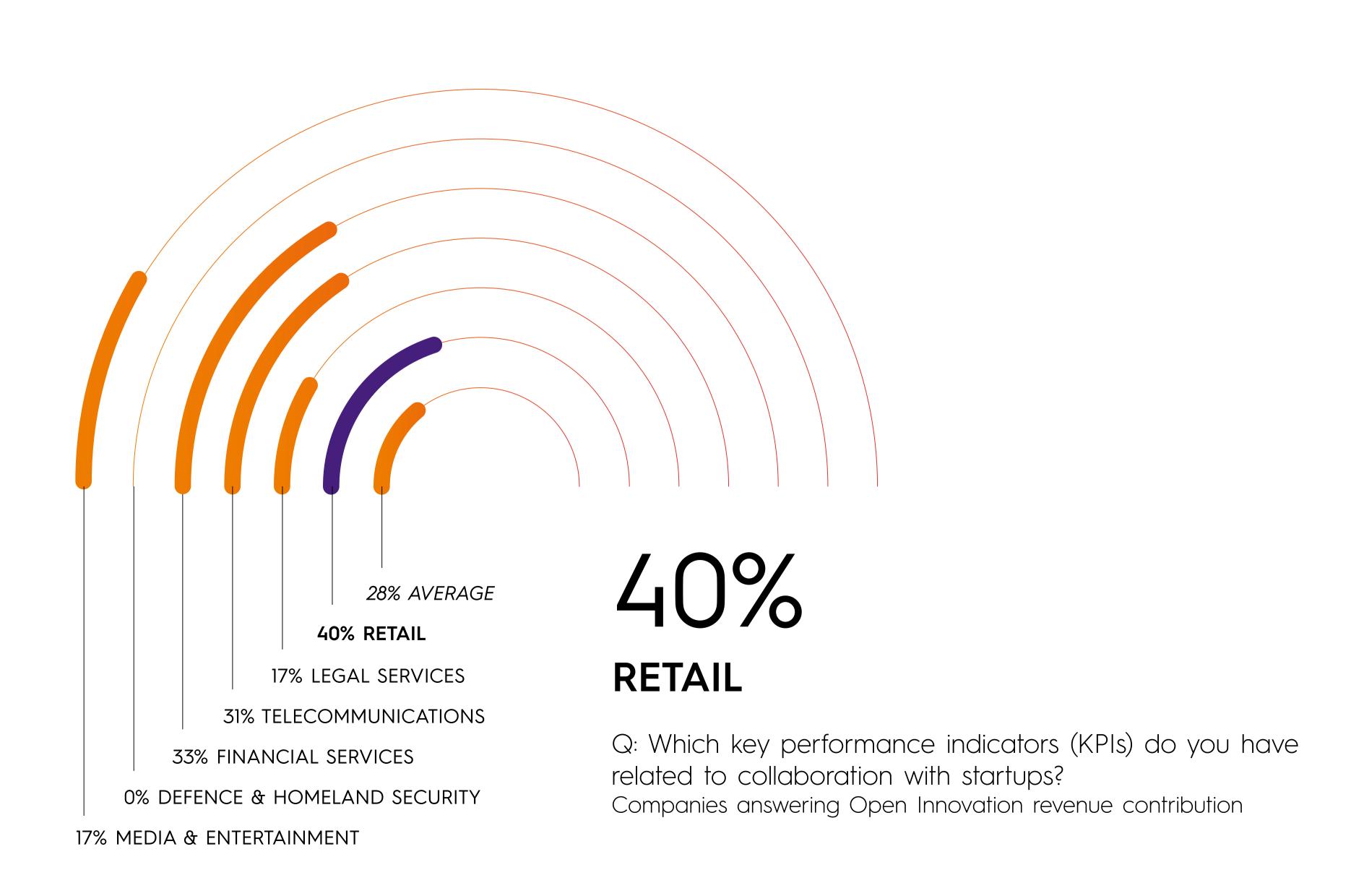
Companies answering Very Important (Mission Critical) and Slightly Important, but not Mission Critical

Companies answering Always and Most of the Time.

1 Third highest industry to place responsibility at top management



5. Revenue contribution is driving Open Innovation projects in Retail





## Telecommunications

#### Telecommunications sector most committed in Europe to Open Innovation

According to Sopra Steria Next's Open Innovation Report 2025, Telecommunication corporates are leading the way in successful Open Innovation practices.

Almost 9 out of 10 (89%) of surveyed corporates have collaborated with startups, the highest of any industry in the report. Moreover, 75% report success in their Open Innovation projects, with 88% of corporates considering Open Innovation to be crucial to their strategy, the highest response of any industry.

Telecommunication corporates also point to other essential elements for success in Open Innovation. 85% of corporates have a dedicated department for these initiatives, the highest of any industry.

Among those corporates who have run Al collaborations, 78% believe startups will be vital in executing their AI strategy, the highest of any industry. Overall, the Telecommunications sector is well positioned to capitalise on future growth and technological developments, with 86% of active Open Innovation collaborators aiming to continue and increase their focus on Open Innovation.

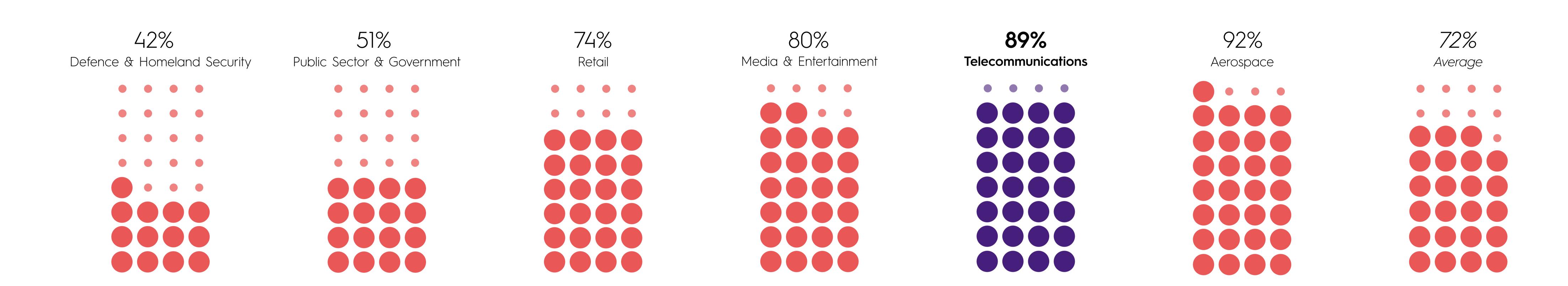
of Telecommunication corporates have collaborated with a startup - the highest participation of any sector

> of corporates judge Open Innovation to be of strategic importance - the highest rating of any industry

of Telecommunications corporates reach their objectives for collaborations always or most of the time - the most successful rate of startup collaborations

#### Second highest number of corporates to have collaborated with startups

Q: Has your organisation ever collaborated with a startup? Companies selecting Yes, both Domestic and Foreign Startups, Yes, Domestic Startups and Yes, Foreign Startups



#### Highest level of corporates who judge Open Innovation to be strategically important

86% 58% 73% LEGAL SERVICES RETAIL AEROSPACE **TELECOMMUNICATIONS** 60% 78% 80%

**AVERAGE** 

20% DEFENSE &

Highest number of successful collaborations

52% 73% 60% ENERGY & UTILITIES AEROSPACE TRANSPORT 68% HEALTH **AVERAGE** 

**TELECOMMUNICATIONS** 

Q: How important is startup collaboration for your organisation's strategy? Companies answering Very Important (Mission Critical) and Slightly Important, but not Mission Critical

INSURANCE

Q: Overall, how often in your collaborations with startups did you achieve your objectives? Companies answering Always and Most of the Time

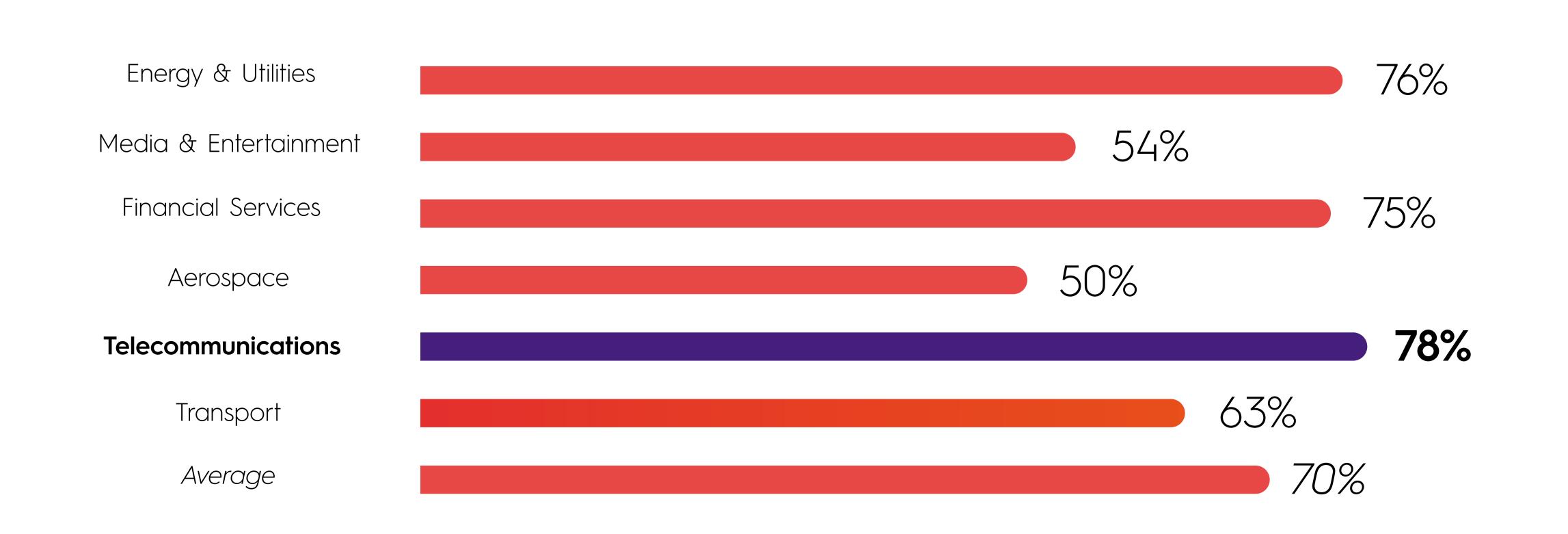
#### Strongest level of conviction

DEFENCE &

HOMELAND SECURITY

that startups will be crucial in executing AI strategies

Q: What future role do you see for startups in the ongoing development and implementation of your organisation's AI strategy? Companies answering As key partners in driving innovation and As integral to your AI development process

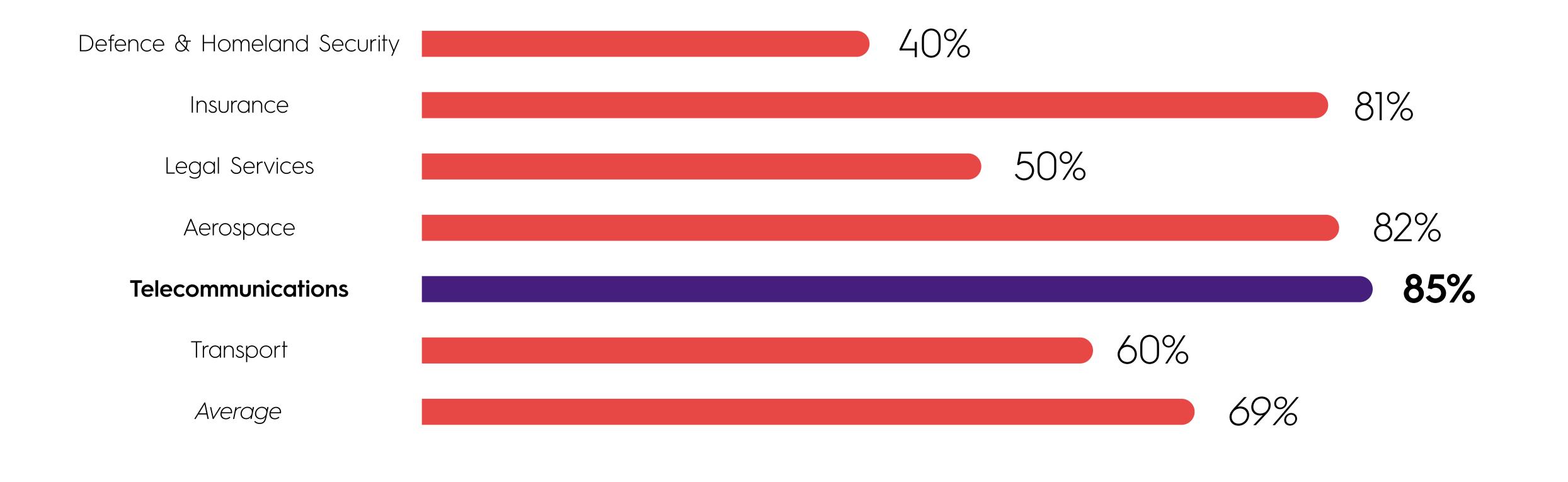


#### Highest prevalence

HOMELAND SECURITY

of dedicated startup collaboration departments

Q: Does your organisation have a dedicated department or business unit that works with startups? Companies answering Yes





## Transport

Lack of top management support holds back Transport sector's adoption of Open Innovation

According to Sopra Steria Next's Open Innovation Report 2025, organisations in the Transport sector have not quite reached the level of success they might be hoping for. 72% of organisations have collaborated with startups, 60% report successful projects, and 77% of them deem Open Innovation as strategically important. These numbers indicate that transport organisations have found moderate success in their adoption of Open Innovation and working alongside startups.

There is one significant element holding Transport organisations back, as only 30% report that responsibility is placed with top management, which is the second lowest of any industry. Transport corporates list their largest barrier to adoption as the lack of structure (34%). In the past two years the Transport sector has engaged in the most logistics and value chain projects of any industry, with 46% doing so. To increase their chances of success, transport organisations need to tackle these challenges head on, continuing their focus on business critical projects, and building the necessary structures and mechanisms to enable their businesses to engage with startups.

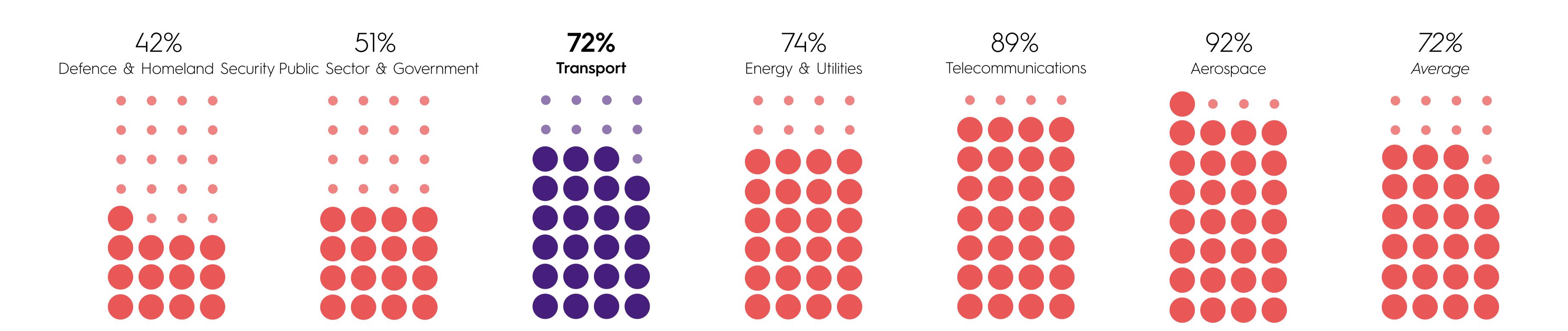
72%
of Transport organisations
have collaborated with
startups - the average level
for all industries

77%
of organisations judge
Open Innovation to be
of strategic importance
- just below average
for all industries

of Transport organisations reach their objectives for collaborations always or most of the time – just below average for all industries

Average level of corporates to have collaborated with startups

Q: Has your organisation ever collaborated with a startup? Companies selecting Yes, both Domestic and Foreign Startups, Yes, Domestic Startups and Yes, Foreign Startups



2. Average level of corporates who judge Open Innovation strategically important

86% 58% 88% RETAIL LEGAL SERVICES TELECOMMUNICATIONS

82% 77% 80% PUBLIC SECTOR HEALTH AVERAGE & GOVERNMENT

77%
TRANSPORT

3. Average level of successful collaborations

52% ENERGY & UTILITIES

20%

DEFENSE &

HOMELAND SECURITY

73% AEROSPACE

60%

PUBLIC SECTOR

& GOVERNMENT

75%
TELECOMMUNICATIONS

45%

60%

65% AVERAGE

TRANSPORT

Q: How important is startup collaboration for your organisation's strategy? Companies answering Very Important (Mission Critical) and Slightly Important, but not Mission Critical

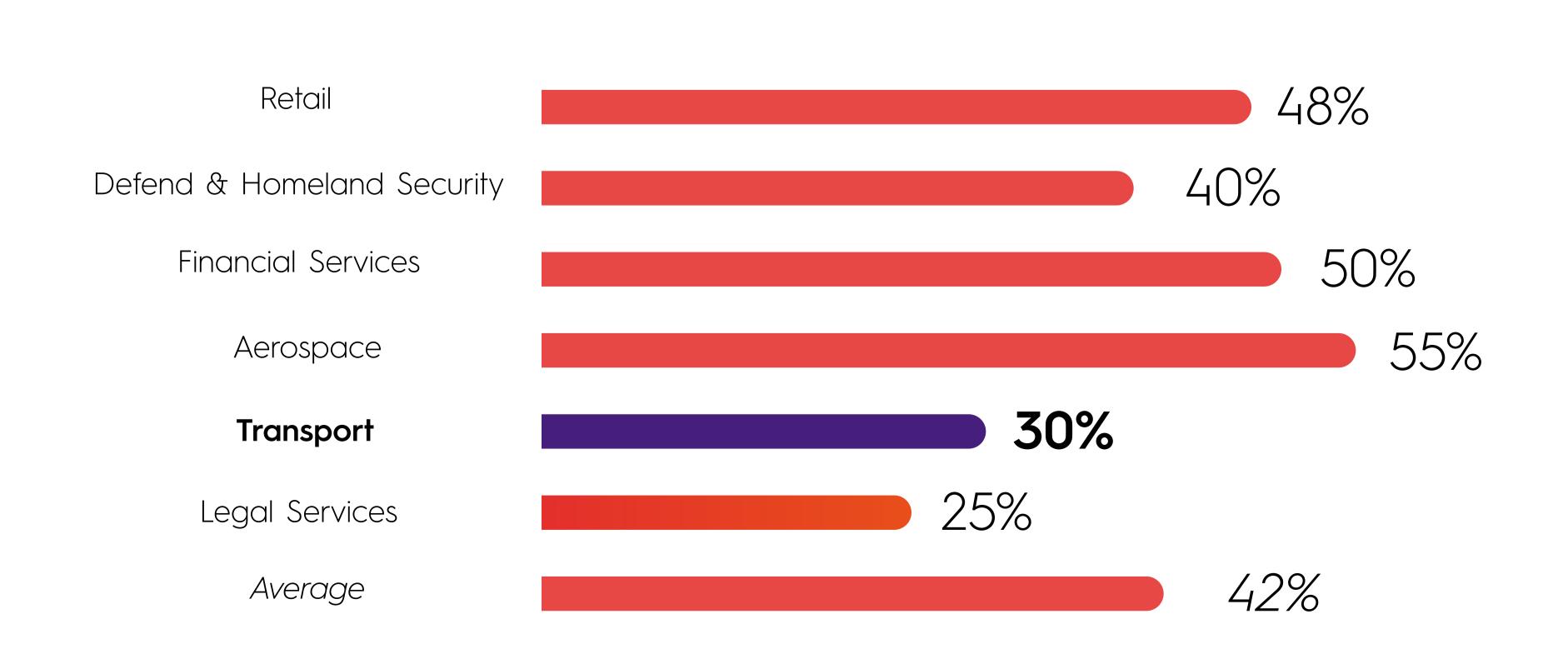
Q: Overall, how often in your collaborations with startups did you achieve your objectives? Companies answering Always and Most of the Time

#### ) \( \square \) Second lowest industry

to place responsibility at top management

Q: Where in your organisation is the responsibility for the startup collaboration placed?

Companies answering at Top management



### 1 Societies/Value chain collaborations

Logistics/Value chain collaborations

Q: In which area(s) have you collaborated with startups within the last 24 months?

Companies selecting Logistics/Value chain

