

Thoughtworks Global CIO Survey 2026: Who governs enterprise AI?

Brazil: CEO-led decisions alongside business-unit budget autonomy

Executive summary

Brazil combines strong CEO influence over AI decisions with comparatively high business-unit control over AI budgets. That makes it a useful example of why influence, spending authority and accountability should not be treated as the same thing.

Brazilian CIOs also report high visibility and preparedness, while the CIO/CAIO relationship is more often described as a source of friction or unclear boundaries than in other surveyed markets.

Key findings

CEO influence is particularly strong. 40% of Brazilian CIOs identify the CEO as the function or role with the greatest influence over AI decisions, the highest figure among the 10 markets surveyed.

Budget authority is more distributed. 26% say AI investment decisions and budgets are controlled independently by business units outside IT, also the highest country figure. Another 21% describe budget management as shared across IT and the business.

Visibility and self-reported preparedness are

high. 91% report full or high visibility into AI tools or workflows adopted independently by business units, including 59% reporting full visibility. 65% describe their organization as very prepared to govern AI consistently.

CAIO boundaries remain a live issue. 72% report having hired a CAIO. 36% describe the CIO/CAIO relationship as a source of friction or unclear boundaries, the highest market-level figure in the survey.

Retail is a striking sector cut. Among Brazilian retail, catering and leisure respondents, 86% identify the CEO as having the greatest influence over AI decisions, 98% report an existing CAIO and 92% say their organization is very prepared to govern AI.

What this suggests

Brazil's findings demonstrate the difference between strategic influence and operational or budget authority. With CEOs prominent in decision-making and business units comparatively likely to control budgets, there is a clear case for making responsibilities explicit across leadership layers.