November 2026
Infographic
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The Real Business Value of AI

Why Scaling AI Value Requires a New Management Discipline

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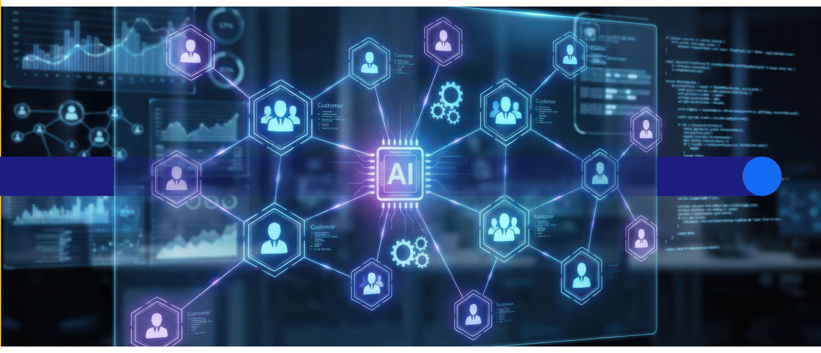


AI value is real; enterprise-wide scale is not guaranteed

Most organizations see results; fewer scale them across the business.

66% say AI has delivered substantial or transformative results

48% are scaling AI value consistently across multiple business units

The economic stakes are rising

71% expect AI spending to rise 10%+ in the next 12 months

22% expect increases above 25%

Where AI is strengthening the business

- Employee experience
- Revenue growth
- Customer experience
- Innovation
- Risk reduction

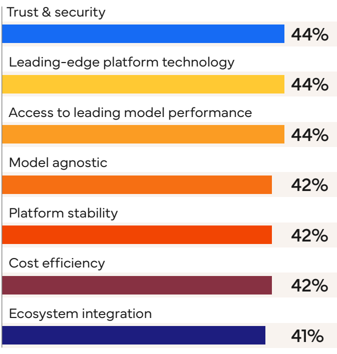
AI now spans 6.5 business areas on average. **Top five:**

- IT/technical infrastructure
- Cybersecurity
- Customer service
- Marketing/PR
- Sales/business development

AI is becoming a portfolio management challenge

Leaders must weigh adding models against security, IP protection, and the cost of change.

Top criteria for choosing an AI platform nearly tied.

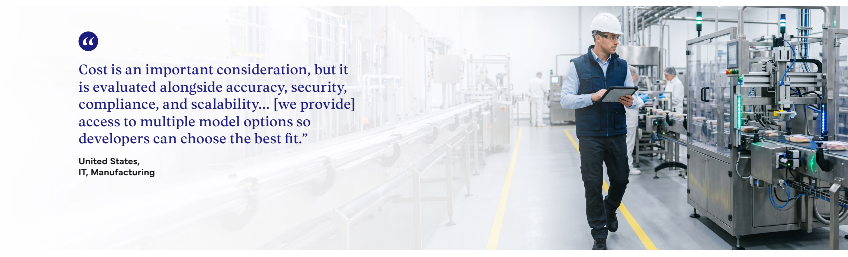


Note: All within 3 points.

Organizations use **3** AI models in production, on average.

Barriers to adding or updating models:

Intellectual property protection	Security concerns	Cost to replatform
43%	38%	37%



> “Cost is an important consideration, but it is evaluated alongside accuracy, security, compliance, and scalability… [we provide] access to multiple model options so developers can choose the best fit.”
>
> **United States,**
> **IT, Manufacturing**

Agents are moving from tasks to workflows

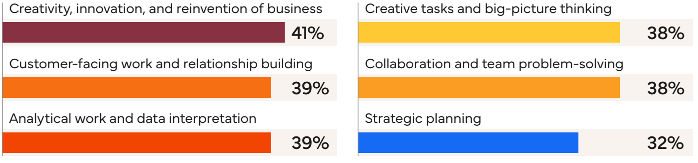
As organizations orchestrate agents across processes, the opportunity shifts from incremental productivity to redesigning work around people and agents.

43% are orchestrating agents across workflows.

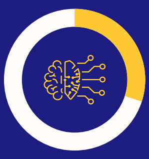
32% of organizations are actively rolling out agents at scale.

35% are using agents extensively in their part of the organization.

Beyond time savings: where agents free people for higher-value work.



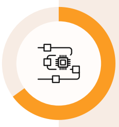
Human oversight remains the prevailing approach, but **30%** are comfortable letting agents make all decisions without human approval.



> “We are prioritizing an agentic AI platform where you can design, build, maintain, and govern agents in one place. That’s needed to not build agents with individual effort but be able to deploy many, many agents that scale and are governed.”
>
> **Germany,**
> **IT, Telecommunications**

Governance must extend to agent decisions and actions

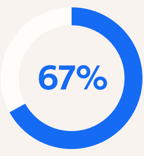
Strong oversight gives organizations the confidence to scale AI.



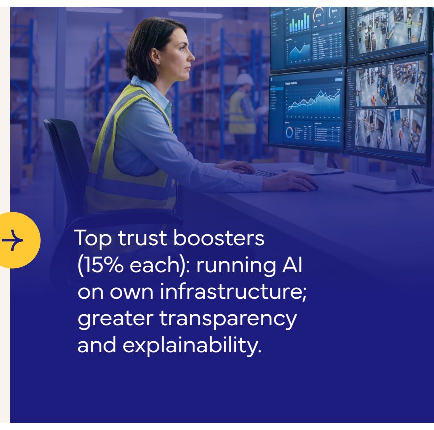
65%
have an established process to govern and oversee agents.

60%
of organizations have high confidence in their ability to address security and governance risks.

Trust is high



67% report high trust in their AI systems.



Top trust boosters (15% each): running AI on own infrastructure; greater transparency and explainability.

Frontier Firms show the payoff from AI at scale

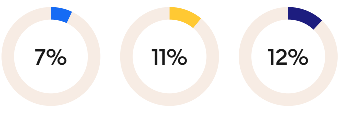
The strongest performers* reporting higher returns combine breadth of use, agentic adoption, skills, risk management, and spending discipline.

Frontier Firms report earning higher average ROI (average return for every dollar invested) than slow adopters.

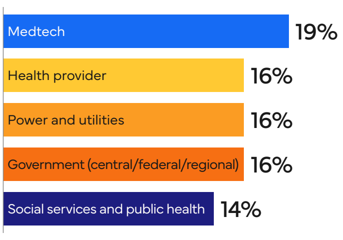
	Frontier Firms		Slow adopters
AI overall	4.0x	versus	2.7x
Agentic AI	3.8x	versus	3.0x

Surveyed organizations that are Frontier Firms

By region



Top industries



*IDC’s AI maturity scale measures behaviors, including spending discipline, breadth of use, agentic adoption, skills, confidence to address AI risks, and outcomes. The top 10% are classified as Frontier Firms, and the bottom 30% are classified as slow adopters.

Four disciplines for scaling AI value

Manage models, agents, governance, and measurement as one accountable enterprise system.

Unlock model choice	Use a trusted AI platform that protects IP and data security and gives you the flexibility to choose the right model for each job, cost-efficiently.
Redesign workflows around agents	Connect agents across processes, with human oversight where it matters, to transform work rather than automate isolated tasks.
Govern decisions and actions	Embed security, governance, accountability, and observability so that greater agent autonomy can scale with confidence.
Measure and optimize value	Connect investment and performance data to business outcomes, directing spending toward the right opportunities that deliver the greatest return.

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Message from the sponsor

Microsoft

AI value is real, but scale is not guaranteed. Frontier Firms in this research manage models, agents, governance, and measurement as one system—and report higher returns. That discipline turns fragmented AI into lasting advantage.

Microsoft calls this Frontier Transformation: redesigning work around people and agents so AI becomes a core enterprise capability. We connect the context of human work and business processes into intelligence that compounds across models, agents, and workflows—on an open, model-diverse platform with security, governance, and human oversight built in. AI in the flow of human ambition—empowered by intelligence and trust, at scale.

Learn more at Microsoft AI

Methodology

The global quantitative study (fielded June-July 2026) included 5,204 respondents across 24 countries, spanning 28 verticals and company sizes from 1,000 to 20,000+ employees — 50% IT and 50% line of business, with no roles below senior director.

The qualitative research included insights from 13 line-of-business senior executives participating in a three-day discussion board, referred to as a Qualboard, exploring AI adoption and decision-making.

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