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Forecast Analysis: Agentic AI Spending in Software Markets

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Initiatives: Technologies and Markets

Agentic AI will redefine enterprise execution, advancing AI from task support to measurable, outcome-driven automation within core operations. Agentic AI software spend is projected to reach \$985 billion by 2030, growing at a 62.7% CAGR from 2025 to 2030 as enterprises scale adoption.

Overview

Forecast Assumptions

- By 2030, **agentic AI** will become a core enterprise execution layer, with 55% of enterprises running production agents across multiple functions, up from 5% in 2025.
- By 2030, cross-functional multiagent systems will execute 35% of enterprise workflows with minimal human approvals, up from 3% in 2025.
- Hybrid pricing models blending consumption, packaged, and outcome-linked structures will account for 35% of enterprise agentic AI spend by 2030, rising from 10% in 2025.
- By 2030, 85% of enterprise agentic AI investments will be bundled into existing SaaS and cloud renewals rather than net-new contracts, scaling up from 55% in 2025.

Market Impacts

- Vendors will increasingly compete for control of business execution flows rather than for superior stand-alone capabilities, shifting competitive advantage away from model or feature differentiation. This will compress differentiation at the agent level and concentrate strategic value in platforms that control enterprise identity, data access, and workflow orchestration.
- Margin and value capture will shift from individual agents to orchestration, governance, and data layers, where control over reliability, compliance, and cost predictability will determine long-term vendor profitability and differentiation.
- As multilayered pricing structures take hold in agentic AI, vendors will face growing pressure around value realization and transparency. This shift will drive differentiation through measurable business impact and accelerate the transition toward value-aligned enterprise relationships and resilient monetization architectures.
- Our current position is that agentic AI will not trigger the death of SaaS. Instead, these capabilities will be increasingly embedded within existing SaaS platforms, with buyers continuing to prefer established and incumbent providers that already manage their data and workflows. As trust and infrastructure centralize around these ecosystems, M&A activity will accelerate, with agentic AI startups that are unable to differentiate or scale independently exiting the market. This consolidation will significantly narrow the addressable market for stand-alone agent vendors and point solutions.

Notable Changes

This note covers the enterprise market for both functional and cross-functional AI **assistants** as well as the broader agentic AI landscape, including technologies that range from task-level support to autonomous, outcome-driven automation embedded in core business workflows. It includes a comprehensive five-year enterprise spending forecast by agent type, covering traditional AI assistants, simple AI **agents** used for task automation, and advanced autonomous AI agents orchestrating multistep, cross-department execution. It also highlights key adoption trends, value drivers, and economic implications for each category.

The analysis focuses exclusively on enterprise spending, excluding consumer spending and professional services spending, to ensure the forecast reflects investments tied to internal business operations, production deployments, and platform integration. For more details about the forecast methodology used, see [Market Definitions and Methodology: AI Spending](#).

Forecast Data Summary

Enterprise AI is shifting from conversational assistants to agentic execution, where software autonomously performs governed, outcome-driven tasks. Early adoption focused on AI assistants that improved productivity but delivered varying levels of transformation. Agentic AI goes beyond assistance by enabling systems to plan, act, and deliver outcomes with human oversight. As a result, enterprise spending is moving away from fragmented **generative AI** (GenAI) pilots toward production-grade agents embedded in core applications. Stand-alone agent solutions are emerging, but the market remains in an early and rapidly evolving stage.

AI assistants currently represent 70% of generative AI spend due to easy deployment and broad use, but their share will decline as budgets shift toward systems with clearer operational ROI and more controllable economics, and as rapidly advancing technical capabilities enable the development of more sophisticated agents. Simple AI agents will overtake assistants by 2028, expanding from 24% of overall spend in 2025 to 46% by 2030 as enterprises scale bounded automation with predictable performance and low governance overhead (see Figure 1).

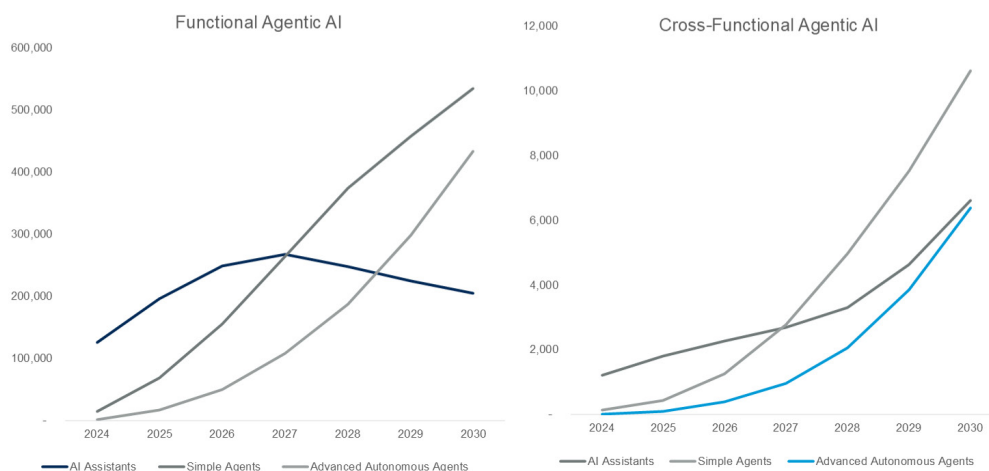
Autonomous agents will post the fastest growth, rising from 6% of overall spend in 2025 to 37% in 2030, reaching \$440 billion as confidence in data readiness, **observability**, policy controls and the ability to achieve outcomes reliably strengthens. Cross-functional autonomous agents are positioned to become a major engine of growth, albeit from a small initial base, as their ability to seamlessly interact across multiple systems matures. By eliminating handoffs and automating end-to-end processes, these agents are expected to scale rapidly, driving a projected 136% compound annual growth rate (CAGR) fueled by significant gains in speed, cost efficiency, and execution reliability.

Buying behavior is consequently reshaping around vendors that integrate into existing stacks and package agents around discrete outcomes, such as claims processing. However, adoption is currently tempered by integration hurdles, security requirements, and hidden operational costs. Trust is the primary inhibitor, followed by cost and market noise from “agent washing.” A significant nontechnical barrier is the “incentive gap”: individuals currently bear the personal risk of agent failures while the organization reaps the collective value, creating a natural caution against delegating complex autonomy.

To succeed, vendors must demonstrate operational readiness through “governance by design,” auditability, and transparent total cost of ownership. Long-term market winners will be those capable of turning data into trusted decisions at the lowest operational cost.

Figure 1: Functional and Cross-Functional Agentic AI Spending 2025-2030

Functional and Cross-Functional Agentic AI Spending 2025-2030



Source: Gartner (February 2026)
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Table 1: Spending on Functional and Cross-Functional AI Assistants and Agentic AI, 2024-2030 (Millions of U.S. Dollars)

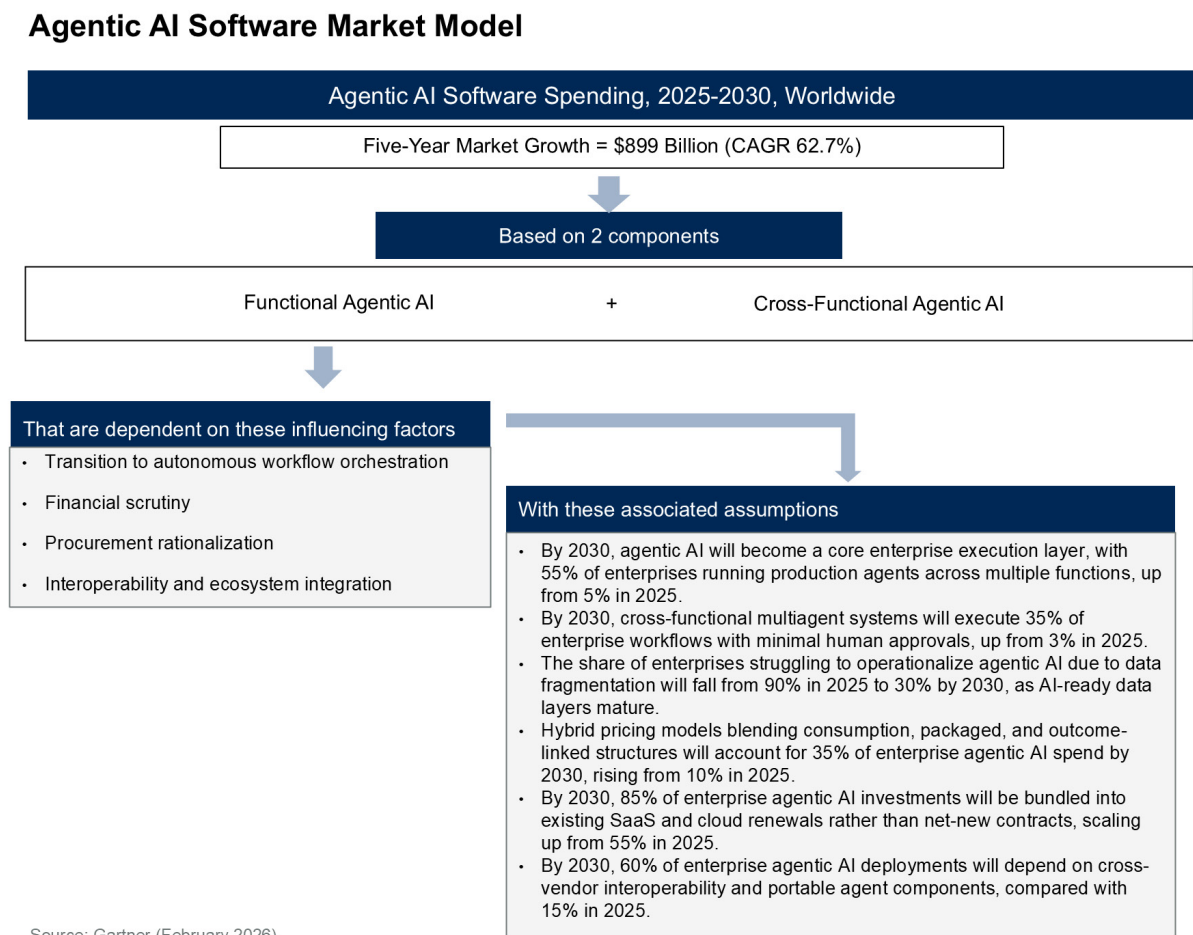
(Enlarged table in Appendix)

Autonomy	2024	2025	2026	2027	2028	2029	2030	CAGR (2025- 2030)
AI Assistants	127,062	197,927	251,053	269,808	250,970	228,891	211,423	1.3%
Functional	125,841	196,127	248,793	267,108	247,663	224,249	204,804	0.9%
Cross-Functional	1,221	1,801	2,260	2,700	3,306	4,642	6,618	29.7%
Agentic AI	15,709	86,426	206,453	376,323	568,785	768,137	985,215	62.7%
Functional Simple AI Agents	14,646	68,679	154,851	264,354	374,812	458,182	534,574	50.7%
Cross-Functional Simple AI Agents	136	436	1,247	2,764	4,959	7,523	10,636	89.5%
Functional Advanced Autonomous AI Agents	926	17,224	49,966	108,241	186,947	298,590	433,623	90.6%
Cross-Functional Advanced Autonomous AI Agents	1	87	390	964	2,066	3,842	6,382	136.0%

Note: Totals may vary slightly due to rounding. For more information, see Note 1.

Source: Gartner (February 2026)

Figure 2: Agentic AI Software Market Model



Forecast Model Summary

Gartner's forecast methodology for the agentic AI market is based on a comprehensive market model that captures the structure and dynamics of this emerging segment. The model integrates forecast components with influencing factors across supply, demand, and macro economic conditions. On the supply side, growth depends on how quickly vendors advance agentic capabilities, such as autonomous task execution, multistep reasoning, and tool orchestration, along with secure frameworks and interoperability.

On the demand side, adoption is shaped by organizational readiness for autonomy, including workflow redesign, change management, explainability, and governance for trust and accountability. Macro-level drivers such as regulatory clarity on autonomous decision making, competitive pressure for productivity gains, and the growth of enabling ecosystems such as cloud, APIs, and multiagent platforms influence market trajectories. Unlike the initial phase of enterprise GenAI adoption, which focused on content generation, agentic AI introduces deeper operational transformation, making enterprise integration speed and governance readiness critical to forecasting growth. See Market Definitions and Methodology: AI Spending for more detail.

Influencing Factors and Assumptions

Influencing Factor: Transition to Autonomous Workflow Orchestration

AI adoption is evolving from conversational interfaces to systems capable of autonomously coordinating and completing business workflows. This progression enables enterprises to extend AI beyond support and interaction tasks, integrating it into operational processes that deliver tangible business results. As orchestration and integration capabilities mature, organizations will increasingly deploy AI agents that execute work with consistency, transparency, and operational reliability.

Forecast Assumption: By 2030, agentic AI will become a core enterprise execution layer, with 55% of enterprises running production agents across multiple functions, up from 5% in 2025.

Agentic AI adoption in enterprises is currently in an experimental phase, with most organizations limited to pilots or narrowly scoped deployments focused on proof of value and risk containment. Gartner expects agentic AI will move from high-profile proofs of concept to production-grade systems executing routine, business-critical work end to end. The buying motive has evolved from exploring AI adoption to pursuing measurable business outcomes such as faster cycle times, lower error rates, and improved cash conversion. Boards and executive sponsors are funding initiatives that demonstrate hard ROI, maintain transparent control over agent actions, and provide auditable reporting of results. Initiatives that fail to meet these thresholds are being paused or defunded as enterprises tighten scrutiny on value realization.

Market dynamics now favor applications that deliver seamless, risk-managed activation of agentic capabilities (meaning existing expectations, governance, and accountability apply). Demand concentrates around vendors embedding agents directly into daily workflows and offering preconfigured guardrails such as permissions, approval checkpoints, audit trails, and rollback capabilities. Early enterprise successes share three attributes: clearly defined missions, measurable service levels with explicit cost ceilings, and governance that keeps business, legal, risk, and security aligned. Evaluation criteria are shifting from model capabilities to a partner's ability to deliver reliable, auditable throughput and sustainable unit economics.

Over the next three years, adoption will expand from departmental pilots to cross-functional operations as enterprises consolidate around a small number of standardized agent platforms with shared oversight frameworks. By 2030, leading organizations will redesign select processes entirely around agents rather than layering automation onto legacy steps, reserving human effort for exceptions and higher-value decisions. As a result, enterprise spending on agentic AI is expected to increase more than tenfold, from \$86 billion in 2025 to \$985 billion in 2030.

Forecast Assumption: By 2030, cross-functional multiagent systems will execute 35% of enterprise workflows with minimal human approvals, up from 3% in 2025.

Cross-functional orchestration is emerging as the next frontier for enterprise AI, shifting focus from optimizing individual workflows to enabling connected intelligence across departments. Over the next two years, organizations are expected to progress beyond simple, domain-specific tasks toward pilots of agents capable of collaborating across multiple business systems to align data, decisions, and actions.

However, achieving this vision requires overcoming significant hurdles in coherence and interoperability. As enterprises deploy diverse agentic environments, they face technical challenges and vendor resistance regarding security, control, and liability. Success depends on platforms that embed governance, observability, and cross-domain integration by design rather than as postdeployment additions.

While cross-functional agents are expected to deliver major operational impact by 2030, they will represent only a small share of near-term enterprise AI spending. According to our forecast, just 2% of total agentic AI investment by 2030 will target these use cases, as budgets continue to focus on simple AI agents and automation within specific domains. The current wave of functional agents already includes orchestration and reasoning capabilities, but these remain bounded within their domains. Cross-functional systems will emerge as enterprises begin linking mature functional agents through shared governance, unified data models, and oversight frameworks.

Forecast Assumption: The share of enterprises unable to operationalize agentic AI due to data fragmentation will fall from 90% in 2025 to 30% by 2030, as AI-ready data layers mature.

As agentic AI transitions into production, data readiness has emerged as the critical factor determining execution reliability, surpassing model capabilities in importance. Enterprises are finding that agents often fail economically, generating retries and hidden costs, not because of the models themselves, but because underlying business data lacks shared semantics, clear ownership, or execution traceability. Consequently, data readiness is now viewed as a prerequisite for production rather than a postdeployment fix.

The market distinguishes scalable deployments by the presence of **AI-ready data** layers that integrate governance, semantics, and observability. While pilots often collapse under production load due to fragmented data and inconsistent definitions, leading enterprises are successfully linking data quality metrics to agent performance. They utilize semantic frameworks to guide agent behavior and ensure actions adhere to business rules and risk boundaries.

Ultimately, dependable agentic AI is a data execution and trust challenge. In multistep workflows, even high model accuracy can suffer from compounding errors, significantly reducing overall reliability. Enterprises that invest in AI-ready data as strategic infrastructure will unlock repeatable operational capacity, whereas those ignoring this foundation risk remaining stuck in pilot cycles with limited business impact.

Influencing Factor: Financial Scrutiny

Rising AI expenditure is attracting financial governance and audit attention. Boards and CFOs want to know not only where AI spend is going, but what measurable value it returns. This scrutiny is driving a transition from experimental, usage-based pricing toward outcome-linked and performance-tied evaluation models. Enterprises prefer predictable, accountable pricing that ties directly to task completion or business KPIs.

Forecast Assumption: Hybrid pricing models blending consumption, packaged, and outcome-linked structures will account for 35% of enterprise agentic AI spend by 2030, rising from 10% in 2025.

Agentic AI is forcing a fundamental rethink of software monetization. Today's market remains dominated by consumption-based pricing. Vendors charge through credits, usage tiers, or per-task pricing that abstract the underlying token consumption driving costs. Credit- or wallet-based models are expanding rapidly, offering enterprises flexible budgets that cap exposure while preserving elasticity. Major suites such as Microsoft 365 and Adobe Creative Cloud now embed baseline AI or agentic capabilities directly into standard licenses, illustrating a broader shift toward tiered or packaged pricing that monetizes advanced or compute-intensive functions through premium tiers or credit systems. While these structures enable scalability, they are increasingly strained by enterprise demand for cost predictability, ROI transparency, and clearer links between spend and business value.

In response, vendors are evolving toward hybrid structures that layer predictability and value assurance on top of consumption frameworks. Outcome-linked components are emerging as selective add-ons, tying portions of fees to measurable results such as task completion, resolution, or efficiency gains. Together, these developments reflect a clear convergence toward multilayered pricing architectures that combine bundled baseline capabilities with usage meters, credits, and outcome-linked elements. This blended model is expected to define the dominant trajectory for agentic AI pricing over the forecast period. As vendors seek to protect margins while strengthening customer trust, pricing transparency and governance will become critical differentiators, signaling maturity, accountability, and alignment between technical autonomy and enterprise outcomes.

Influencing Factor: Procurement Rationalization

Procurement teams are increasingly pursuing vendor consolidation to strengthen risk controls and reduce the administrative and contracting effort associated with managing large, fragmented supplier portfolios. As enterprises modernize their procurement and renewal processes, the integration of agentic AI into SaaS and cloud life cycle management is emerging as a potential enabler of greater efficiency. These capabilities streamline buying workflows, support reuse of existing compliance documentation, and help organizations manage negotiations more consistently across portfolios.

Forecast Assumption: By 2030, 85% of enterprise agentic AI investments will be bundled into existing SaaS and cloud renewals rather than net-new contracts, scaling up from

55% in 2025.

As agentic AI matures beyond early stand-alone pilots, organizations are increasingly co-termining agent capabilities with core suites to streamline procurement, reuse established security approvals, and capitalize on volume-based economics. This shift reflects a preference for administrative convenience and risk reduction. According to the 2025 Gartner AI Buying Behavior Survey, 55% of respondents reported that their organizations prefer to work with incumbent vendors with whom they have trusted relationships (see Figure 3).¹

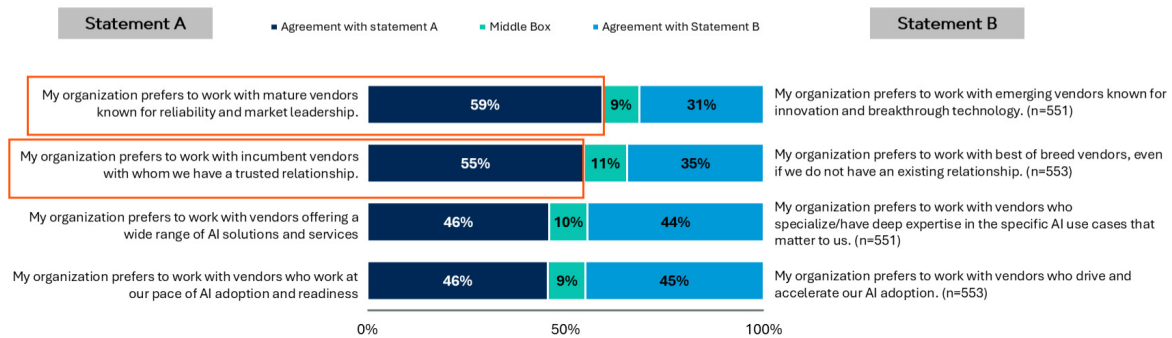
However, while commercial control is consolidating with large SaaS and cloud providers, operational control is diverging toward the enterprise. Regulatory pressures, performance constraints, and requirements for digital sovereignty are reshaping deployment strategies, with approximately 60% of European organizations preferring AI workloads to run locally in sovereign clouds. This creates a clear distinction between how AI is bought (via incumbents) and where it runs (increasingly in private or hybrid environments for regulated industries).

This dual dynamic forces vendors to demonstrate flexibility. Those capable of offering consistent capabilities across both SaaS and customer-controlled footprints, with minimal friction in policy enforcement, are best positioned to win. While incumbents and hyperscalers will dominate broad distribution through marketplaces, specialist providers retain an opportunity to capture market share by delivering material KPI improvements in complex domains. To succeed, these specialists must integrate natively with enterprise approvals and audit systems. For buyers, the strategic advantage lies in treating agents as portable operational capacity rather than mere bundled features, ensuring long-term accountability and leverage.

Figure 3: Preference for Mature and Incumbent Vendors

Preference for Mature and Incumbent Vendors

Level of agreement



n varies; all respondents excluding not sure/not applicable

Q06f: For each pair of statements below, please select the point on the scale that best reflects your organization's preference for AI vendors.
 Source: 2025 Gartner AI Buying Behavior Survey conducted November-December 2025 among 556 with knowledge of AI use cases within their enterprise or function. Fielded by Gartner using an external panel
 ID: 845041

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Influencing Factor: Interoperability and Ecosystem Integration

As agentic AI handles regulated data and autonomous decision making, enterprises are asserting more control over where systems run and how they interact. At the same time, enterprises operate heterogeneous tech stacks and demand interoperability to prevent vendor lock-in. Portable agent architectures, open APIs, and policy-aligned controls allow organizations to orchestrate workloads securely across vendors and environments, building resilience and trust in large-scale deployments.

Forecast Assumption: By 2030, 60% of enterprise agentic AI deployments will require cross-vendor interoperability and portable agent components, compared with 15% in 2025.

Agentic AI is evolving into an open ecosystem where agents and applications must operate seamlessly across vendor boundaries. Enterprises now expect agents to invoke capabilities and share context securely across different platforms, making interoperability a critical buying criterion rather than a secondary feature. Emerging frameworks are driving vendors to adopt standardized interfaces, moving competitive differentiation from closed feature sets to the quality of integration and backward compatibility.

This shift is accelerating enterprise spending by fostering trust, reducing vendor lock-in, and increasing the reusability of existing assets. As budgets expand from pilots to multivendor production rollouts, market power is accruing to platforms that simplify agent composition through stable APIs and certified integrations. Buyers specifically favor agent portability, which allows logic, context, and policies to move across environments without rebuilding.

To succeed, vendors must support clean migration paths and transparent dependency management so upgrades do not disrupt workflows. Future contracts and marketplaces are expected to mandate compatibility guarantees and portability assurances, such as exportable agent context. Ultimately, enterprises are prioritizing vendors that treat interoperability as a core product capability to ensure long-term operational flexibility.

Evidence

¹ **2025 Gartner AI Buying Behavior Survey.** This survey was conducted to gain insight into the current and future state of AI adoption within enterprises, focusing on usage patterns, vendor engagement, outcomes, and satisfaction levels. The research was carried out online in November and December 2025, with participation from 556 respondents across North America (n = 276), Western Europe (n = 207), and the Asia/Pacific region (n = 73). Participating organizations represented a diverse range of industries, each with planned enterprisewide revenue of at least \$50 million USD (or equivalent) for the fiscal year 2025. All organizations surveyed had implemented at least one AI use case. Qualified respondents held IT or business unit roles and possessed knowledge of AI use cases across their enterprises or within specific business units or functions. Their primary responsibilities included setting or influencing the organization's AI strategy and planning, determining which AI use cases to deploy, and managing the implementation of these use cases. Disclaimer: The results of this study do not represent global findings or the market as a whole, but reflect the perspectives of the respondents and organizations surveyed.

Note 1

- Functional agentic AI encompasses spending related to:
 - Application software markets: analytic platforms, **customer experience** and relationship management, content services, email and authoring, enterprise resource planning, project and portfolio management, supply chain management, and other application software.
 - Infrastructure software markets: application development, application infrastructure and middleware, CPaaS, data management software (excluding DBMS), database management systems, IT operations, networking software, and storage software.
- Spend on agentic AI is the spend on software with embedded agentic AI capabilities and associated consumption costs.

Note 2: Exchange Rate Alert

In the current environment, currency exchange rate fluctuations will remain volatile. Foundational factors, such as interest rates, tariffs and economic sanctions, can change with more rapidity and with less predictability than historic norms. For the near term, expectations for exchange rates should be treated with heightened caution.

Document Revision History

Forecast Analysis: GenAI Spending in Software Markets - 3 April 2025

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[Forecast: AI Spending, Worldwide, 2024-2029, 4Q25](#)

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Autonomous AI
Agents

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Source: Gartner (February 2026)

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