



From Pilots to Production: Why Agentic Transformation Runs Through the Ecosystem

Enterprises have funded the agentic era and now they have to deliver it. The organizations crossing from pilot to production are treating agents as a business transformation, and they are not crossing alone. Platforms, marketplaces, and delivery partners are converging into an ecosystem built around putting agents to work. Google is placing an early, explicit bet on that idea, committing \$750M to its partner program and, this month, adding industry-specific capabilities within Gemini Enterprise, built around bounded, high-frequency use cases.

Executive Summary

Agentic AI has become the center of gravity in enterprise technology spending. **Among AI decision-makers, 92% expect their budgets to grow over the next 12 months**, and agentic AI is the fastest-rising technology priority in enterprise software.¹ Futurum Intelligence forecasts the agent platform segment growing from \$3.2B in 2024 to \$83.5B by 2030, the fastest-growing category of AI software (see Figure 1).²

Figure 1. Enterprise AI Momentum at a Glance



Source: Budget, maturity, and ROI data: ETR (2026, May). AI Product Series, Theme 1 survey; N = 600 AI decision-makers. Priority ranking: Futurum Research (2026, February). 1H 2026 Enterprise Software Decision Maker Survey; N = 830 global IT decision-makers; Futurum Research (2026, July). AI Market Forecast, Polaris dataset. Gemini paid-deployment share reflects ETR's Google Gemini buyer cut (the Gemini product family), not the Gemini Enterprise SKU specifically.

The key adoption constraint has shifted from funding to execution. Most enterprises still rate their AI maturity at or below the midpoint of a five-point scale, and nearly half cannot point to a measured return. The stall points sit in process redesign, governance, and change management, the work that begins after the model is chosen.

That diagnosis reframes what buyers should evaluate, away from the model itself and toward the delivery layer around it, and toward use cases narrow enough to govern and measure. Google Cloud's response is taking shape along those lines: a full stack, an agent marketplace, a \$750M ecosystem commitment, and new industry-specific capabilities within Gemini Enterprise entering preview this month, a direction the buyer data suggests matches where enterprises are already heading, with nearly half of Gemini Enterprise buyers now in paid deployment (47.1%), with a 56.7 Net Score sustained across six consecutive surveys.

¹ Budget, maturity, and ROI data: ETR (2026, May). AI Product Series, Theme 1 survey; N = 600 AI decision-makers. Priority ranking: Futurum Research (2026, February). 1H 2026 Enterprise Software Decision Maker Survey; N = 830 global IT decision-makers.

² Futurum Research (2026, July). AI Market Forecast, Polaris dataset.



The Money Has Moved, But Production Lags Behind

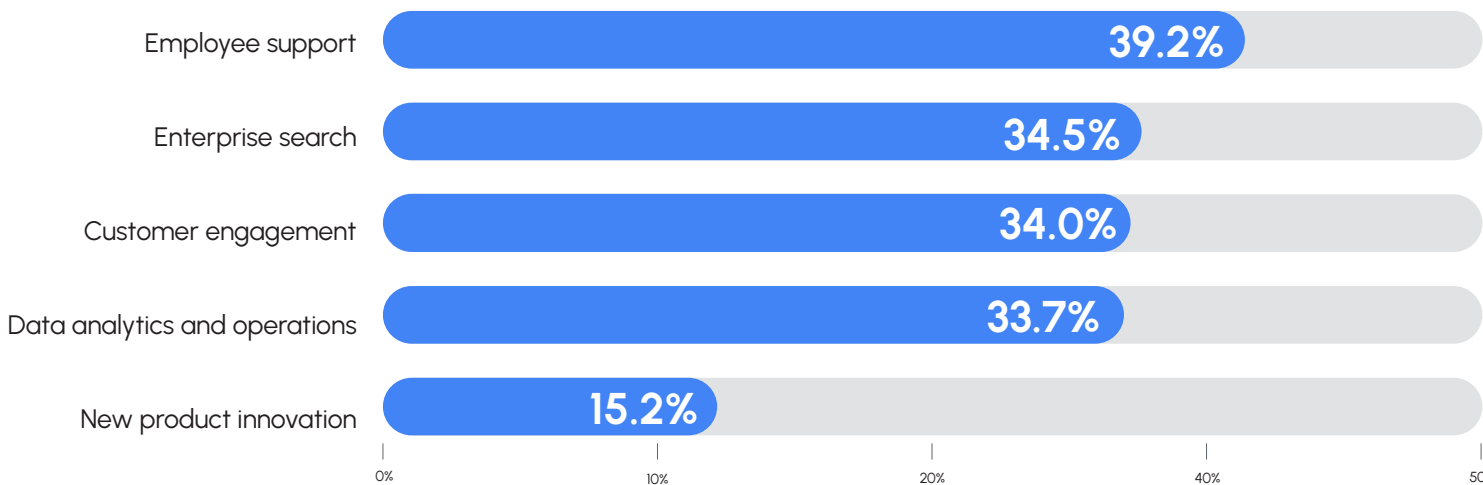
Budgets signal conviction, while maturity and ROI stay early

Enterprise AI budgets are still expanding, and the growth is broad-based rather than concentrated among a few early adopters. Beyond the 92% of decision-makers raising budgets, 83% expect AI to grow as a share of total technology spend over the next two to three years, and agentic AI jumped 31.5% in six months as a top technology priority, the largest gain of any category.³

Production has not kept pace with that conviction. Only 18.5% of AI decision-makers rate their organization a 4 or 5 on a five-point AI maturity scale. Almost half either report no return yet (24.3%) or are not measuring ROI at all (21.5%). Buyers are also changing what counts as success: direct financial impact nearly doubled as the primary ROI measure, while productivity, the metric of the pilot era, fell from 23.8% to 18%.

Where AI has successfully reached production, the pattern is consistent: bounded workflows with clear owners cross first (see Table 1).

Table 1. Enterprise AI Production Rates by Use Case



Source: ETR (2026, March). AI Product Series, Theme 3 Survey; N = 600.

³ Spending and maturity statistics: ETR APS Theme 1, May 2026. Priority and ROI-measure statistics: Futurum Research (2026, February). 1H 2026 Enterprise Software Decision Maker Survey.



The Roadblocks Are Process Issues, Not Model Issues

Futurum's April 2026 analysis of agent platforms, published with Google Cloud, identified three barriers that keep agents in pilot, and none of them is a model-capability problem.⁴ Each is a question about how an organization operates once an agent joins the workflow:



Governance and Visibility: who approved each agent, what data and systems it may touch, and who is accountable for what it does in production.



Integration and Context: connecting agents to the systems, data, and business context where the work actually happens, so their output is grounded rather than generic.



Observability and Evaluation: measuring what agents did, catching quality drift early, and proving the outcome to finance and risk teams.

Buyer behavior data corroborates this idea. When ETR asked organizations building AI internally to rank deployment strategies, connecting models to internal data through retrieval and orchestration came out on top at 57.4%, well ahead of deploying pre-trained models as-is.⁵ Organizations are prioritizing exactly the work the barriers describe: connecting agents to enterprise context, governing what they do, and preparing the people whose processes change around them.

⁴ Patience, N., & Shimmin, B. (2026, April 23). Gemini Enterprise: Governing and Scaling the Agentic Enterprise. The Futurum Group, published in partnership with Google Cloud. ETR APS Theme 3, March 2026 survey (n = 467 for deployment-strategy questions).

⁵ ETR APS Theme 3, March 2026 survey (n = 467 for deployment-strategy questions).



Value Is Created Through Orchestration and Delivery

Futurum expects platforms, marketplaces, and partners to decide who scales

Futurum reads the agentic era as a restructuring of enterprise software, with value shifting from individual applications to the layer that composes agents across them. Global enterprise software grows from \$341B in 2024 to \$762B by 2031 in Futurum's Systems of Agency forecast, and agentic capability is the central driver of that expansion.⁶ Within it, Futurum Intelligence expects agent builder platforms to overtake prebuilt AI applications in revenue before 2030, which would make the platform decision, rather than any single application purchase, the defining procurement event of the next planning cycle.

The production data adds a second lesson: agents succeed where work is mostly repetitive and the custom remainder is bounded. Contract review, claims intake, research summarization, and service triage fit that shape; open-ended judgment work does not, at least not yet. That is why Futurum expects the next phase of the market to be packaged around use cases rather than around general-purpose capability, with vendors and partners shipping pre-built workflows for the repetitive core and leaving the custom remainder to configuration. Buying behavior is already reorganizing to match: two-thirds of decision-makers (65.9%) now prefer consolidated platforms over point tools, 41% are actively reducing their application count, and consumption-based pricing preference for generative AI features has climbed to 42.9% even as it declines for core software.⁷

The economics of delivery are shifting along with the packaging. Enterprises want to build with their own hands (56% still prefer building most applications in-house), yet the maturity data shows most cannot yet carry process redesign and change management alone. The ecosystem's role, in Futurum's view, is to bridge the widening gap between the pace at which agentic capability improves and the pace at which an enterprise can absorb it: services firms productizing agents they once delivered as projects, marketplaces distributing them, and platform vendors co-funding the crossings. As that partner economy matures, platform evaluations will look less like a software bake-off and more like choosing a delivery capability, with the platform, its marketplace, and the partners who build on it assessed together.

⁶ Futurum Research (2026, February). Systems of Agency enterprise software forecast; Futurum Research (2026, July). AI Market Forecast.

⁷ Consolidation, pricing, and build-preference statistics: Futurum Research.IH 2026 Enterprise Software Decision Maker Survey Report.



Google Cloud's Bet: Packaging the Stack Around Industry Use Cases

Gemini Enterprise is being built out as a partner-first, industry-first platform

Google Cloud is assembling its answer to the production gap around two commitments. The first is vertical integration: TPUs, the Gemini model family, the data platform, and Gemini Enterprise in one co-optimized stack, kept open with 200+ models and a growing catalog of partner applications and agents. The second is a wager on partner-led delivery. Services remain under 2% of Google's revenue, and the company has committed \$750M to building out the certified partner bench the strategy depends on, seeding those partners with referrals, and co-funding their first production deployments (see Figure 2).⁸

The newest, and most concrete, expression of the strategy is tailored industry solutions built on Gemini Enterprise, with a few industry-solutions entering preview in late August with general availability targeted for later this year. Rather than selling general-purpose AI capability, each solution packages industry-specific skills, data connectors, and first- and third-party agents into the existing Gemini Enterprise license, with no separate industry SKU, and aims them at the bounded, high-frequency workflows the production data favors:



Legal: contract triage and risk scoring, playbook creation, regulatory horizon scanning, privacy-request fulfillment, and deposition preparation, built with Google's own legal organization and validated with a small group of co-launch law firms



Financial Services: financial research, portfolio risk analysis, and deal preparation, tailored for capital markets and commercial banking, drawing on connectors to major market-data providers, with broader insurance workflows to follow; the launch workflows were validated with co-launch financial institutions.

Google estimates the launch skills cover a large share of the common starting-point workflows in each field, and integrated partners at launch include the major research, document, and data platforms of each vertical. Distribution follows the same ecosystem logic: partner agents surface in context inside Gemini Enterprise workflows, and the marketplace filters them by industry. Whether the packaging works is a question the preview period will answer; what it signals clearly is that Google is aiming the platform at specific use cases and personas rather than at AI in the abstract.

⁸ Program figures, launch timing, workflow coverage, and partner details in this section are vendor-reported, from Google Cloud briefings and launch materials, July 2026; not independently verified by Futurum. Preview and general-availability timing subject to change.

Figure 2. Google's Industry Strategy in Three Numbers



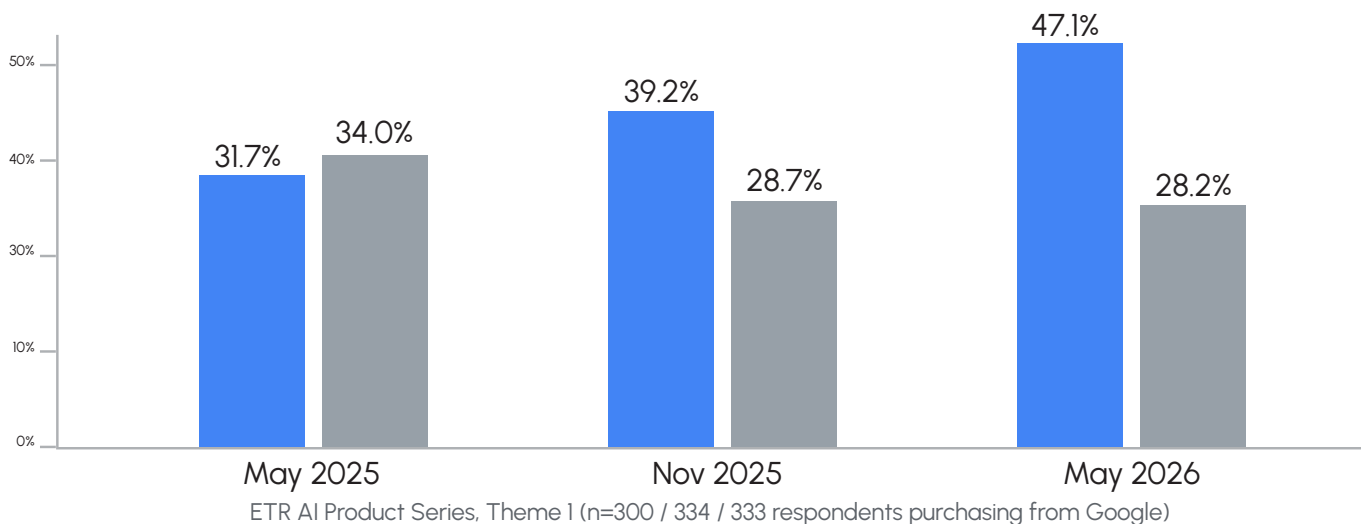
Source: Program figures, launch timing, workflow coverage, and partner details in this section are vendor-reported, from Google Cloud briefings and launch materials, July 2026; not independently verified by Futurum. Preview and general-availability timing subject to change.

Buyers Are Voting With Seats

Buyer data shows conversion, expansion, and standardization

The industry solutions are too new to show up in buyer data, but the platform they sit on is not, and its trajectory is the best available evidence on whether Google's approach converts. The share of Gemini buyers in paid deployment climbed from 31.7% in May 2025 to 47.1% in May 2026, while replacement intent held near 3%; among current customers, 51% expect seat counts to grow within six months (see Figure 3).⁹

Figure 3. Buyer Adoption Signals Continue to Strengthen



Source: ETR APS Theme 1 surveys, May 2025 through May 2026 (n=300/334/333 respondents purchasing from Google).

⁹ ETR APS Theme 1 surveys, May 2025 through May 2026 (n = 300/334/333 respondents purchasing from Google).

Paid deployment up 15 percentage points in 12 months, with evaluation still full.



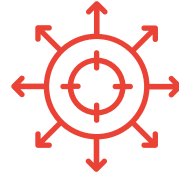
56.7

Net Score, Google ML/AI



6 of 6

Surveys Above a 53
Net Score



+4.3 pts

Account Penetration,
Year Over Year

Source: ETR APS Theme 1 surveys, May 2025 through May 2026 (n=300/334/333 respondents purchasing from Google).

Spending intent has stayed elevated as the customer base has grown, which separates durable platform demand from a promotional spike.¹⁰ Buyers describe these purchases as standardization decisions rather than experiments, often structured as multi-year platform commitments, and their reasoning echoes the openness Google leads with: respondents cite "short-term time to value and easiness to go live" and call the platform "a great way to avoid vendor lockdown and diversify across other cloud providers." Once Gemini Enterprise becomes the enterprise's AI platform, more workloads follow to Google Cloud as applications are migrated over to it. Where spending does pull back, cost and contract economics are the trigger far more often than capability, which keeps deployment economics at the center of what remains an open race.

"We have signed a strategic multi-year agreement with Google Cloud for cloud computing and their AI offerings. This is a fundamental pillar of our Agentic AI platform."

— Enterprise IT Decision-Maker, ETR Edge, April 2026

¹⁰ ETR (2026, July). Technology Spending Intentions Survey; Google ML/AI, n = 457. Commentary: ETR Edge, April and June 2026.



Conclusion

Agentic transformation is a rebuild of how work flows through an enterprise, and getting there affordably depends as much on platform design as on model choice. Cost and token economics weigh on every deployment, and an open, full-stack platform gives enterprises more room to manage them. When one provider optimizes the chips, models, security, and software together while still letting buyers bring their own models and partners, companies gain more ways to hold down cost and improve the return on their AI spending as they scale on their own terms and budget. The other half of the equation is execution: redesigning processes, governing agents in production, and bringing people along. A few enterprises can do all of that on their own. Most will get there by pairing a platform they can govern centrally with partners who bring industry and process depth, plus pre-built use cases that shorten the trip from buying a license to running something in production.

For buyers, the practical path starts narrow and measured. The use cases already crossing into production, such as employee support, enterprise search, and customer engagement, offer the shortest route to the financial returns that now define AI success, and the industry packages now arriving extend the same logic into legal, financial, and scientific work. The platform evaluation that follows should weigh grounding, observability, and the strength of a partner bench alongside the technology itself. For the services firms and software vendors on the other side of those deals, the same shift opens a growth market that Futurum Intelligence models at roughly 72% compound annual growth through 2030 as agents move from projects to products.¹¹

Google Cloud has pointed its agentic strategy at the part of the problem the data says is hardest, and its direction matches where the buyer data says enterprises are going. How far the bet carries will show up in the numbers soon enough: first in how the industry previews convert at general availability, and then in whether the newly funded partner bench starts closing deployments at scale.

¹¹ Futurum Research (2026, July). AI Market Forecast (Polaris).

Important Information About This Report

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[Google Cloud](#) offers a powerful, optimized AI stack—including AI infrastructure, leading models like Gemini, data management capabilities, multicloud security solutions, developer tools and platform, as well as agents and applications — that enables organizations to transform their business for the Agentic Era. Customers in more than 200 countries and territories turn to Google Cloud as their trusted technology partner.

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