

MANATECH

Research Report

Global AI Strategy and Adoption: Navigating the Transition to Scaled Impact and Agentic Systems

Executive Summary

The global landscape of Artificial Intelligence (AI) has transitioned from a period of novelty and experimentation into a critical phase of organizational scaling and the emergence of "agentic" systems. As of late 2025, approximately 88% of organizations report regular AI use in at least one business function—a significant increase from 78% just a year prior. However, a "scaling gap" persists: while tools are commonplace, only about one-third of organizations have successfully embedded AI deeply enough into workflows to realize material enterprise-wide financial impact.

A distinct cohort of "AI high performers" (representing roughly 6% of respondents) has emerged, consistently seeing EBIT impacts of 5% or more. These organizations differentiate themselves by moving beyond simple efficiency gains to prioritize growth and innovation, fundamentally redesigning workflows, and securing active C-suite ownership. Simultaneously, the rise of Agentic AI—systems capable of planning and executing multi-step workflows autonomously—is shifting the focus toward "hybrid intelligence," where human verification remains a foundational requirement for trust and reliability.

National strategies, such as New Zealand's "Investing with Confidence," mirror these global trends by emphasizing private sector adoption over foundational development. The goal is to leverage AI for productivity gains while managing risks through robust governance and responsible AI frameworks.

Detailed Analysis of Key Themes

1. The Scaling Gap and Financial Impact

While AI adoption is nearly universal, capturing enterprise-level value remains a challenge for the majority of organizations.

- **Pilot vs. Scale:** Nearly two-thirds of organizations remain in the experimentation or piloting phase. Only 39% of survey respondents report a measurable EBIT impact at the enterprise level, and for most, this impact is less than 5%.
- **The Size Differentiator:** Larger companies (revenues >\$5 billion) are significantly more likely to have reached the scaling phase (nearly 50%) compared to smaller firms with less than \$100 million in revenue.

(29%).

- **EBIT Drivers:** High performers are three times more likely to seek transformative change. Revenue increases are most commonly reported in marketing, sales, and product development, while cost benefits are seen in software engineering and IT.

2. The Rise of Agentic AI

The next frontier of AI innovation is "Agentic AI," characterized by systems based on foundation models that can act in the real world.

- **Maturity and Adoption:** Approximately 62% of organizations are at least experimenting with AI agents. 23% report scaling an agentic system in at least one business function.
- **Primary Use Cases:** Agent use is most prevalent in IT (service-desk management) and knowledge management (deep research). Customer-facing applications are cited as the fastest-growing area for agentic deployment.
- **Human-in-the-Loop:** Despite the autonomy of these systems, human oversight remains critical. 69% of agentic AI decisions are currently human-verified, and teams are aiming for an even human-AI partnership rather than total autonomy.

3. Characteristics of AI High Performers

Organizations that realize significant value from AI share specific strategic and operational traits.

Feature	High Performers	Peers
Objective	Growth and Innovation	Efficiency and Cost Reduction
Workflow Design	Fundamentally redesigned individual workflows	Incremental changes to existing processes
Leadership	Senior leaders demonstrate active ownership	Implementation delegated to IT/Digital depts
Budget	>20% of digital budget committed to AI	Lower, piecemeal investment
Risk Mitigation	Active management of a broad range of risks	Limited focus on only 1 or 2 risks

4. National Strategic Approaches: The New Zealand Model

The New Zealand Government's AI strategy, led by the Ministry of Business, Innovation & Employment (MBIE), provides a template for national AI integration.

- **Strategic Focus:** The strategy deliberately prioritizes *AI adoption and application* over foundational development. This reflects a strategic choice to leverage international advancements to drive domestic productivity.

- **Responsible AI:** MBIE provides a "Responsible AI Guidance for Businesses" to help organizations—from sole traders to large non-profits—use systems in a trustworthy way.
- **Barriers to Uptake:** Key identified obstacles include a need for coordinated government response and a focus on overcoming interconnected barriers to broader private sector adoption.

Key Findings: McKinsey Global Survey 2025

1. **Innovation over Efficiency:** While 80% of organizations set efficiency as an AI objective, those seeing the most value also set growth or innovation as primary goals.
2. **Workflow Redesign:** This is identified as one of the strongest contributors to achieving meaningful business impact.
3. **Hiring Trends:** Organizations continue to hire for AI-related roles, with software engineers and data engineers in the highest demand.
4. **Risk Management:** Mitigation efforts are increasing. In 2022, organizations managed an average of two AI risks; in 2025, that number has grown to four.

Important Quotes with Context

On the Necessity of C-Suite Leadership

"The more we see organizations using AI, the more we recognize that it takes a top-down process to really move the needle... Many companies' instinct is to delegate implementation to the IT or digital department, but over and over again, this turns out to be a recipe for failure."

— **Alexander Sukharevsky, Senior Partner, McKinsey**

- **Context:** Discussing why AI governance and transformation must be an executive-level call due to the intensive resources and change management required.

On the Strategic Shift to Agentic Systems

"AI agents have been the subject of intense buzz and excitement... This gap highlights the contrast between the great potential that manifests in a 'hype cycle' and the current reality on the ground."

— **Michael Chui, Senior Fellow, McKinsey**

- **Context:** Commenting on the fact that while experimentation with agents is high, widespread enterprise scaling is still in the early stages.

On the Competitive Landscape

"New Zealand stands at a pivotal moment in the global AI revolution. The evidence is becoming clear: countries that embrace AI proactively will enjoy significant competitive advantages while those that hesitate risk being left behind."

— New Zealand's AI Strategy: Investing with Confidence

- **Context:** The foreword to the national strategy, emphasizing AI as an essential tool for maintaining global competitiveness and talent attraction.

Risk Management and Mitigation

Organizations are increasingly experiencing and mitigating the negative consequences of AI. 51% of organizations using AI have reported at least one negative consequence.

Top Experienced Risks vs. Mitigation

Risk Factor	% Reporting Consequences	% Actively Mitigating
Inaccuracy	High (Primary concern)	High Priority
Cybersecurity	Significant	Growing Focus
Intellectual Property	Significant	Increasing Priority
Explainability	Moderate	Low (Lagging in mitigation)

Note: AI high performers report more negative consequences than peers because they use AI in more mission-critical, sensitive contexts, which requires more robust monitoring.

Actionable Insights

- **Shift from Pilot to Product:** To overcome the "scaling gap," organizations must transition from use-case-by-use-case thinking to an enterprise-level transformative vision. This involves building foundational infrastructure that can be reused across domains.
- **Redesign, Don't Just Automate:** Meaningful EBIT impact is most strongly correlated with the fundamental redesign of workflows. Simply applying AI to existing processes limits the potential for value capture.
- **Empower "Hybrid Intelligence":** Maintain a "human-in-the-loop" approach, especially for agentic AI. 69% of successful projects currently verify agentic decisions to build trust and ensure reliability.
- **Focus on Growth Objectives:** Leaders should position AI as an enabler of growth and innovation. Focusing solely on cost reductions can limit the internal change management energy and restrict the total impact of the technology.
- **Adopt Formal Governance:** Implement tracking for well-defined KPIs for AI solutions. Only 20% of organizations currently do this, yet it is one of the management practices most correlated with realized bottom-line value.

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operates.**