

Corporate Buyers' Guide to Enterprise AI Platforms

AI sourcing strategies for controlling contract risk, token cost, and vendor lock-in



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Executive summary: The market

Global Corporate AI investment, adoption signals, and the cost of inaction

\$582B

Global Corporate AI investment doubled in a single year

Up from \$253B in 2024. Enterprises are signing production contracts, making platform commitments, and building long-term vendor relationships.

2x

Earnings gap between adopters and disrupted firms

Adopters expanded EBIT margins by 310 bps in 2024 to 2025, twice the MSCI World rate. Firms where AI disruption is core to the thesis have underperformed their moderate-disruption peers by 44% in share price since end-2023.

#1

AI overtook cybersecurity as top CIO priority

In the Morgan Stanley CIO Survey (2026), AI and machine learning ranked number one, pushing cybersecurity to number two.

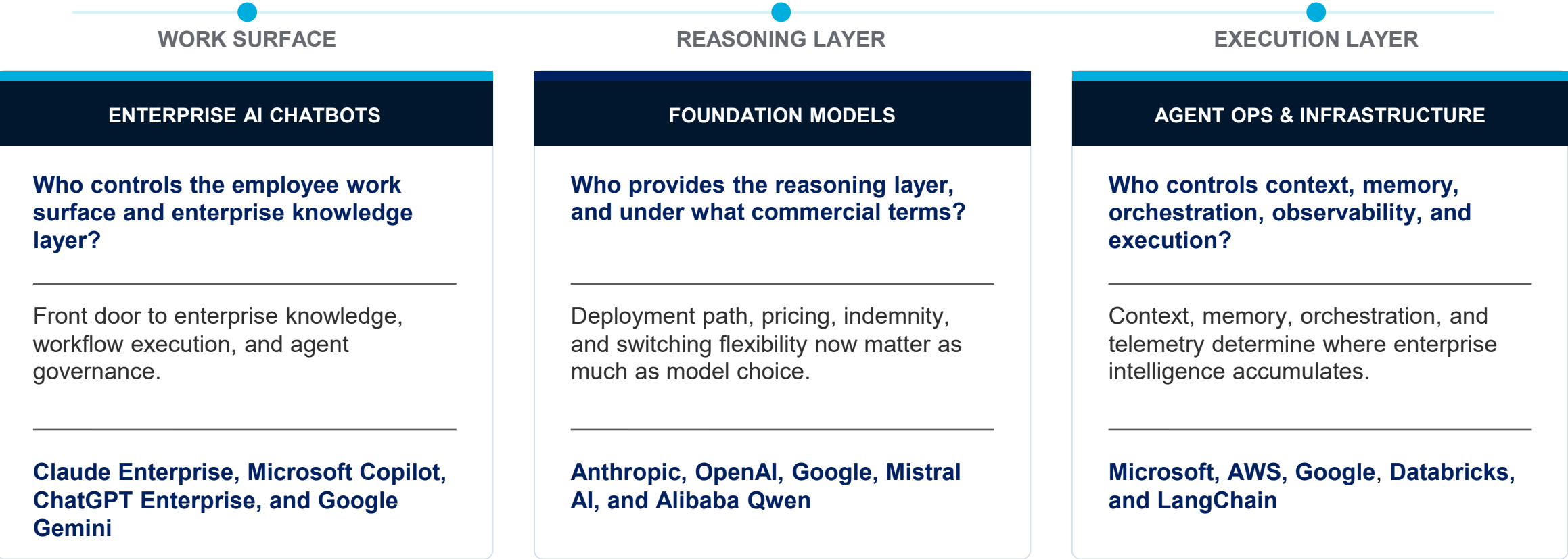
40%

of application AI spend may come through shadow adoption

Teams are buying tools, signing contracts, and building workflows that procurement has never seen.

The market has picked a direction. The companies that moved early are pulling away. The penalty for inaction is accelerating

Executive summary: Vendor landscape and outlook



- **By 2027, model quality becomes table stakes.** Durable buyer advantage comes from owning the execution layer, cost controls, and compliance gates.
- The enterprises that architect for ownership now will compound their intelligence. The rest will discover that the intelligence their systems accumulated belongs to the platform, not to them.

Choose vendors by the control they give you — not just the capabilities they provide

Enterprises are signing multi-year contracts for technology that changes every quarter making it difficult to govern them

1 Model continuity is not guaranteed and product/API lifecycles differ

OpenAI retired GPT-4o, GPT-4.1, and o4-mini from ChatGPT in February 2026 while keeping them available in the API. Separately, OpenAI’s API deprecation docs show that APIs and older models can require migration during a contract term.

2 Price protection is one-way

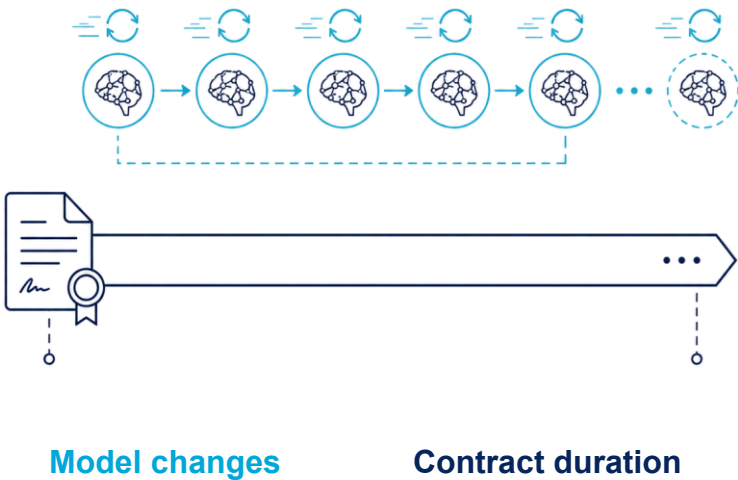
Public model prices can fall faster than enterprise commitments reset. Buyers should negotiate annual repricing, lower-of-public-price protection, and benchmark-based resets.

3 Governance triggers are missing

Model behavior, pricing, and vendor status can all change without notice. Most enterprise agreements have no contractual escalation point for any of these scenarios.

Duration mismatch

Fast model iteration sits above a long, fixed contract term.



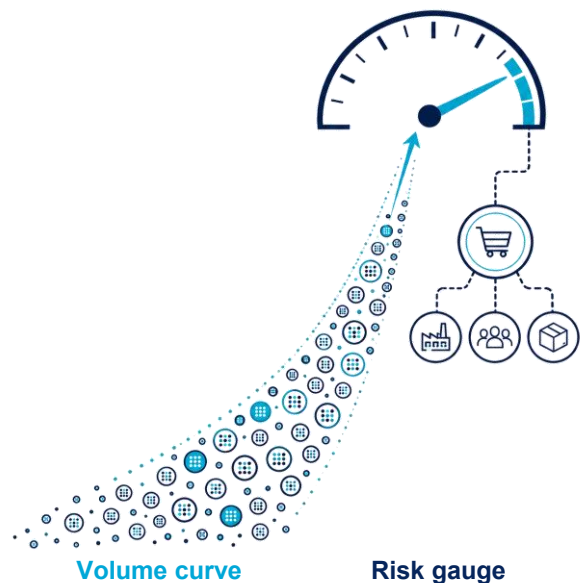
AI creates a duration mismatch: multi-year contracts governing services that can change materially in months

Sources: OpenAI Deprecations page (May 2026); TokenMix enterprise pricing analysis (2026); AI Empire Media (April 2026).

AI usage can multiply faster than budgets, contracts, and controls can absorb

What is token explosion?

Token explosion means usage multiplying as prompts, context, retrieval, tool calls, agent loops, and business adoption scale across the enterprise.



1

Agentic usage breaks static forecasts

Uber exhausted its 2026 AI coding budget in four months. A healthcare enterprise accumulated \$6M+ in unplanned annualized token cost growth before finance had visibility.

2

The volume curve is steeper than the price curve

Goldman Sachs projects 24x token consumption by 2030. Falling unit costs do not guarantee falling total spend.

3

Cost overruns punish the successful use cases first

The more teams adopt AI, the faster shared budget and executive patience get consumed. The programs that get cut are not the ones that failed.

Buyers need to decide before signing: does token risk sit with the vendor, the business unit, central IT, or the AI platform team?

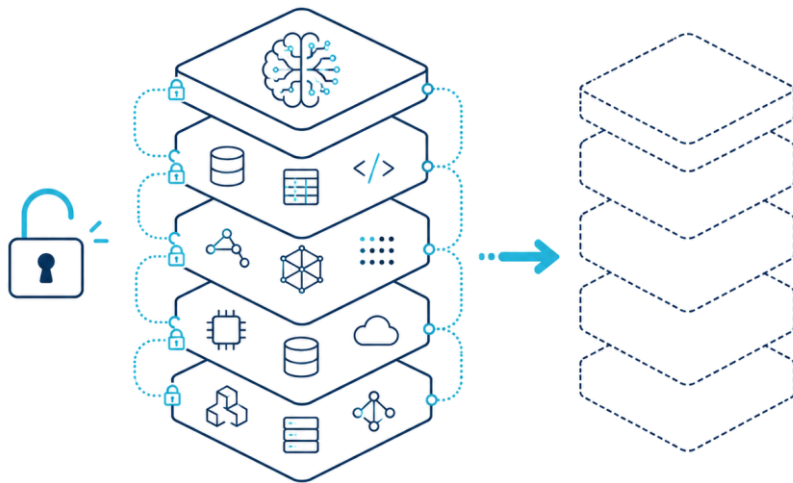
Sources: The Information / Uber CTO (May 2026); Deloitte CFO Guide to AI Token Economics (April 2026); Goldman Sachs (2026).

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Enterprises that have not made an ownership decision are seeing switching costs rise and negotiating leverage erode

Portability debt

Dependencies accumulate across the stack before the migration question is asked.



Current stack

Target stack

1 Lock-in compounds quietly

Each production workflow adds dependencies across data, orchestration, security, monitoring, and compliance. Most enterprises do not know what is portable until they attempt a migration.

2 Leverage declines after adoption

The deepest lock-in is capability, not contracts. Most organizations depend on technology they cannot evaluate or rebuild in-house. Fix that gap first, because exit terms do not help if you cannot judge what you are buying or replacing

3 The default is always the incumbent

Enterprises that have not made an explicit portability decision have already made one. It was made by whichever vendor they adopted first.

Architect for ownership before production; after production, portability becomes a rescue project

Table of Contents

A practical guide from market context to vendor decisions

A	The Market	Market growth, adoption signals, and early-mover advantage	WHY NOW
B	RISE Framework	Matching AI maturity to investment and vendor decisions	HOW TO DECIDE
C	Buying Landscape	Contract terms, cost traps, SLAs, and commercial benchmarks	WHAT TO NEGOTIATE
D	Vendor Evaluations	Comparative assessment across chatbots, foundation models, and agent infrastructure	WHO TO SHORTLIST
E	Takeaways	Priority moves for the next two quarters	WHAT TO DO NEXT



contextmaturitybuying termsvendor choicesaction plan

Appendix: 30+ Vendor Profiles Two-page evaluations combining secondary research and proprietary briefing data

Vendors covered in this report

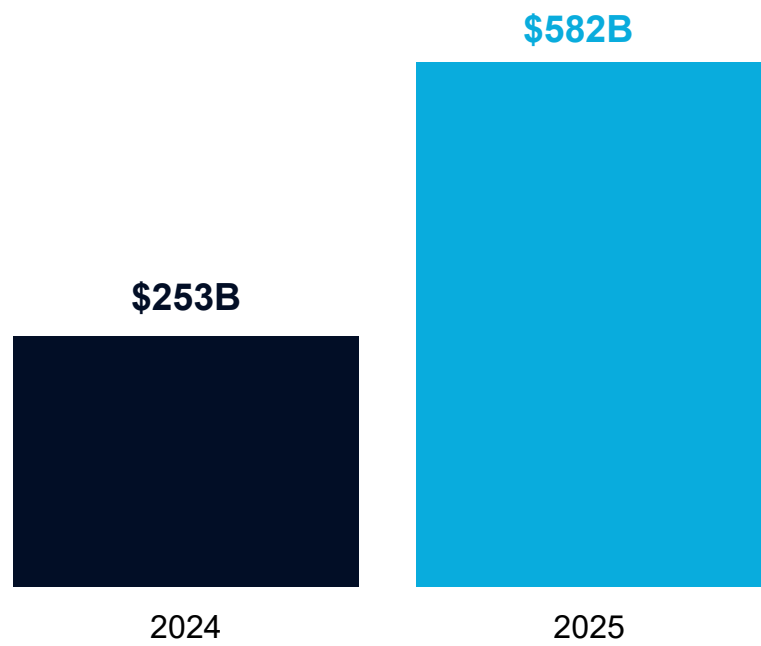


Section A: The Market

How fast the market is growing and how early adopters are pulling ahead

Corporate AI investment and vendor run-rates show enterprise AI is becoming table stakes in IT spend

Global Corporate AI Investment (\$B)



Enterprise AI investment more than doubled in a single year

Vendor ARR (\$B)

Vendor	Latest reported
Anthropic	~\$30B
OpenAI	\$25B+
Cursor	\$2B+
Perplexity	\$450M+
Mistral	\$400M+
Cohere	\$240M+
Glean	\$200M+
Sierra	\$150M+

The vendors receiving it are growing faster than any technology companies in history.

Enterprises are now signing production contracts, making platform commitments, and building long-term vendor relationships

Source: Company disclosures, PYMNTS, Sacra, The Information. (Feb–Apr 2026 unless noted; Mistral and Cohere figures from 2025). © 2026 GAI Insights LLC. All rights reserved. | Q3 2026, Corporate Buyers' Guide

AI adopters are pulling ahead, but the penalty for inaction is growing faster

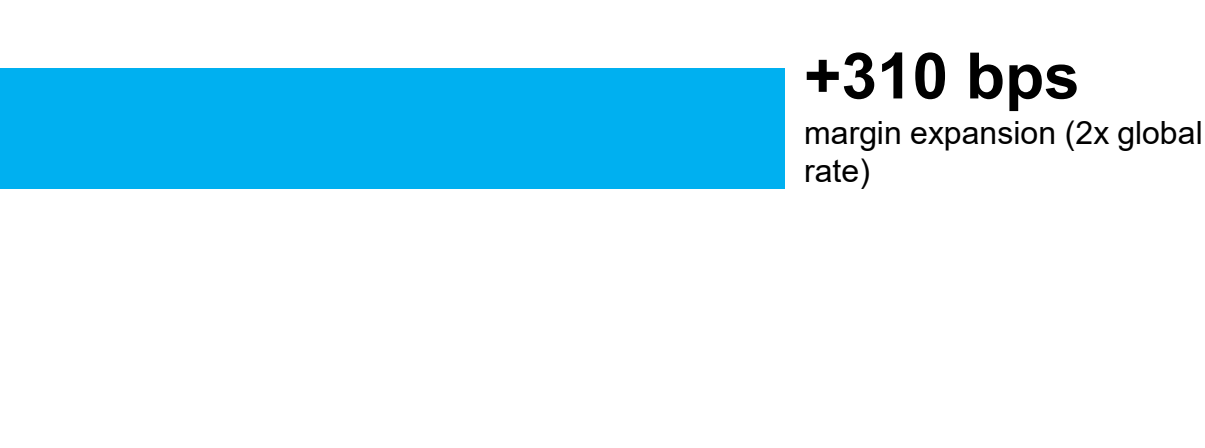
Companies affected by AI disruption

The market actively penalizes business models where AI poses structural threat.

-44%
-44% share price underperformance (where disruption is core vs moderate)

Beneficiaries of AI Adoption

Majority of gains are cost efficiency, not revenue growth



Level of AI Focus

Wait and See.....Selective Adoption.....All-In Transformation

Do not measure AI by pilot completion. Measure it by workflow adoption, margin impact, and operating-model change

Section B: RISE Framework

A framework for matching AI maturity to the right investments and vendor decisions

RISE: The four stages that separate AI pilots from enterprise impact

RISE Framework

	1 R - Research & Education	2 I - Islands of Innovation	3 S - Scaling	4 E - Emergent Intelligence
Activities	- Hands-on education, tooling, and basic guardrails. - Small, low-cost pilots to test where AI works.	- Business units adopt AI on their own. - Standalone wins like marketing personalization or fraud detection. - A Center of Excellence forms.	- Enterprise-wide AI and data strategy with formal governance. - Shared platforms and orchestration. - Cross-functional teams align on high-value use cases.	- Human and AI work as one system. - AI helps test, tune, and improve other AI models. - Adaptive decision-making across the enterprise.
Leadership needed	Explorers who tolerate failure. Permission-givers who allow testing without demanding instant ROI.	Connectors who spot common needs across teams. Translators who explain technical wins in business terms. Portfolio thinkers who decide which experiments to scale.	Integrators who align business and tech. Architects (CIO/CTO) who design coherent data and AI infrastructure. Change agents skilled in governance and alignment.	Visionaries who set direction and anticipate second-order effects. Ecosystem builders (CEO/board) who reshape strategy around AI.

What Changes: AI stops being a technology project and becomes a business operating model.

AI as IT Discretionary Fund
(Fragile, cuttable, measured by pilot completion)

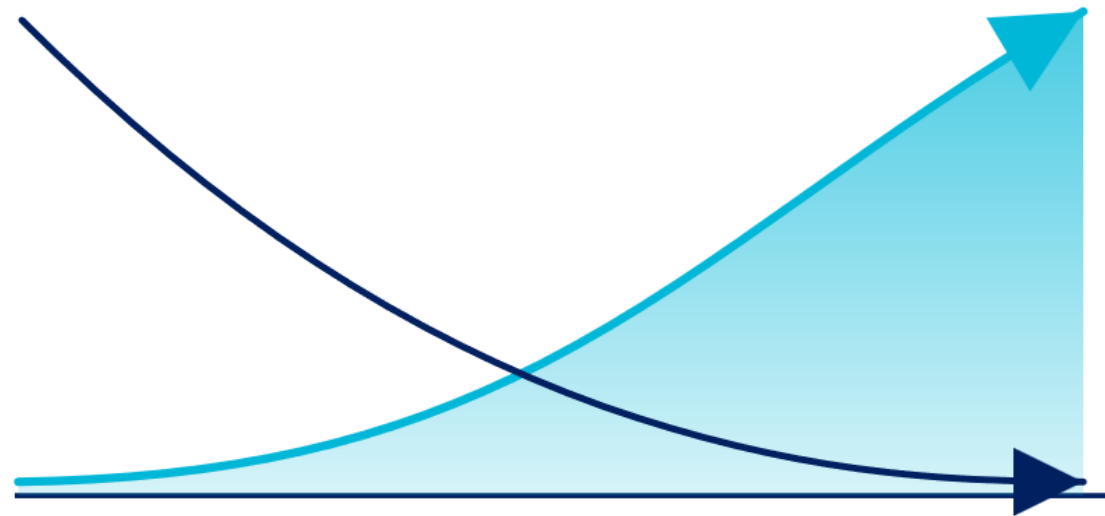


AI as Business Unit P&L
(Operational expense, measured by revenue / cost reduction)

Your AI maturity stage determines what you should buy, how you should contract, and which vendors will serve you best

Token demand is exploding faster than unit prices are falling

The paradox



The exponential sequence

GOOGLE IS SAYING IT OUT LOUD

9.7T → 480T → 3.2 quadrillion

Monthly tokens Google processes:
2024 → 2025 → 2026 (7× in the last year)

“Many companies are already blowing through their annual token budgets — and it’s only May.”

— Sundar Pichai, Google I/O 2026 keynote (May 2026)



Unit costs fall, but quality tokens don’t



BCBS saw a 50× token jump

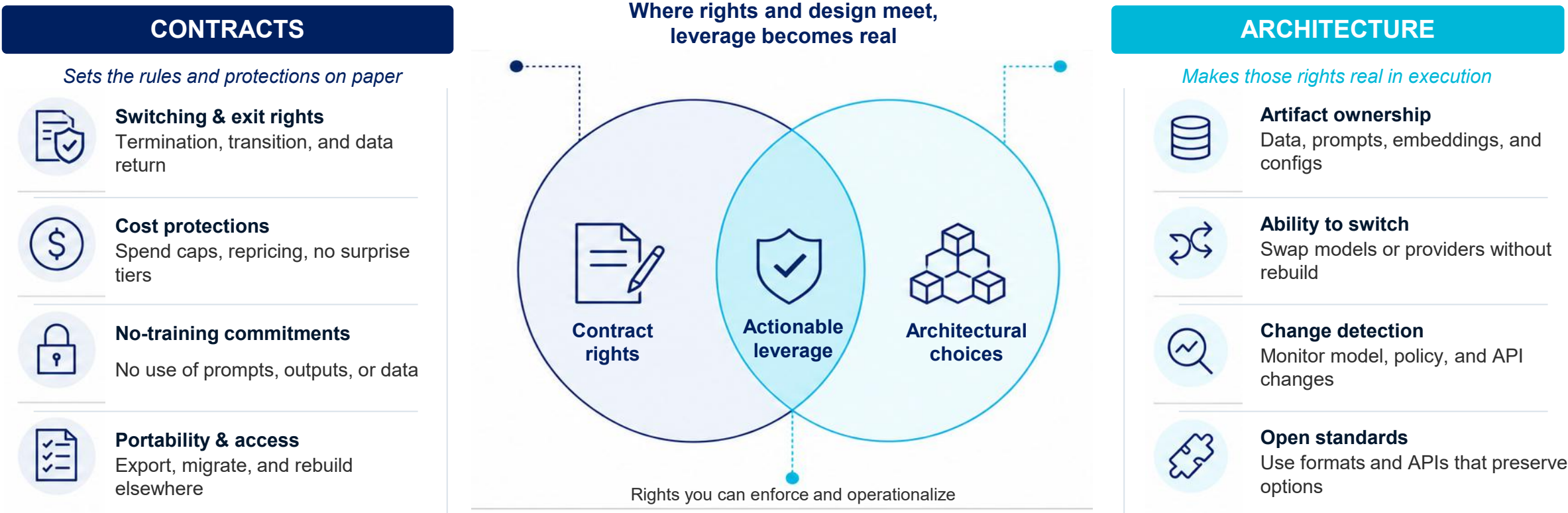


Cost governance is now CFO-level

Despite falling unit prices, total spend is set by volume, and volume is compounding faster than price is dropping

Source: GAI Insights analysis; Google I/O 2026 keynote (May 2026).

Contracts define your rights; architecture determines whether you can exercise them



From clause
to control

1

Negotiate
the right



2

Design for
ownership



3

Operate with
visibility



4

Retain leverage
over time

Leverage is not written into the contract; it is engineered through architecture that makes rights usable

Vendors scored using GAI Insights' proprietary methodology across five categories

Category	What We Evaluate	Axis Contribution
Product / Service Innovation	Benefits clarity, target-buyer fit, pricing transparency, deployment modes, IP/indemnity, agentic readiness, reasoning, multimodal, open-weight flexibility	Strategic Value (Y-axis)
Quality of Investors & Financials	Investor strength, total funding momentum, hyperscaler/chip commitments, published roadmap, revenue traction and commercial viability	Market Readiness (X-axis)
Strategic Relationships	Cloud and hardware alliances, ecosystem / MLOps / channel partnerships, responsible AI / compliance / audit tooling	Market Readiness (X-axis)
Publicly Disclosed Customers	Production deployments, domain diversity, adoption scale and community traction, customer evangelism and references	Market Readiness (X-axis)
Firm Strength / Team Quality	Engineering execution and release cadence, leadership credibility and AI vision	Strategic Value (Y-axis)

All three vendor categories use the same five-category rubric mapped to a Market Readiness × Strategic Value quadrant evaluation

By 2027, AI platforms converge on execution while model quality becomes table stakes

Differentiation moves up the stack

Models remain critical, but buying advantage shifts toward orchestration, governance, and operating controls.

Agentic execution

Reasoning budgets, SLAs, multi-agent orchestration

Workflow integration

Search, actions, research, computer use

Model optionality

Open-weight + proprietary deployment paths

Cost & trust controls

AI FinOps, certifications, regulated readiness

Foundation model quality

Converges across top 4-5 providers

FM

Foundation models

Quality converges across top 4-5 providers; differentiation shifts to cost, latency, reliability, and compliance packaging.

RA

Reasoning & agents

Reasoning becomes a priced product with budgets, transparent pricing, production SLAs, and early orchestration.

EC

Enterprise chatbots

Suite-native and AI-native tools converge on search, actions, and research; computer use reaches early production.

OW

Open-weight models

Frontier parity expands for enterprise tasks; sovereignty and fine-tuning flexibility become standard.

\$

Pricing & procurement

Consumption pricing dominates; token explosion risk requires cost monitoring before scaling.

OK

Compliance & trust

ISO 42001, FedRAMP, and EU AI Act readiness become baseline requirements.

Once model quality becomes table stakes, durable buyer advantage comes from owning execution, control, and cost discipline

About GAI Insights

GAI Insights is the leading resource for news, research, and learning communities focused on Generative AI (GenAI), serving both companies and AI vendors. We offer year-long contracts with AI analysts who provide valuable market insights, best practices, a comprehensive Buyers Guide, and a database of successful use cases. Unlike other firms, we do not sell AI implementation projects. Our exclusive focus on AI and independence from vendors make us a trusted and impartial source for all things AI. Our insights have been featured in four articles in *Harvard Business Review* (HBR) and are highly regarded by our customer references.

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