WEEKLY AI PULSE · VOL. 02

WEEK OF 15 TO 21 JULY 2026

# AI collectors count. AI investors compound.

*One number. One story. Three signals. One pattern. The discipline that separates AI programs that show up in the P&L from AI programs that just sit in the tech stack.*

IN THIS EDITION

02 One number worth sitting with
03 The story that matters
04 Three things to know
05 The pattern I see

**56%**
OF CEOs SEE ZERO ROI

**28%**
MEET ROI EXPECTATIONS

**171%**
ROI WHEN MEASURED WELL

ONE NUMBER

# Where every AI dollar is going in 2026.

Enterprise AI spending will pass $2.5 trillion this year. Only a fraction of it will show returns.




## Same market. Same tools. Different discipline.

THE 28% MOVED

| | | |
|---|---|---|
| *Line-item expense* | → | **Capital investment** |
| *Adoption metric* | → | **Return on capital** |
| *Pilot report* | → | **Return statement** |

THE STORY THAT MATTERS

# Two AI programs. Same tools. Opposite outcomes.

Both organisations bought the same models. Both hired the same vendors. Only one is showing up in the P&L. The difference is not the technology. It is the discipline around it.

AI COLLECTORS

## Count.

- Count licences
- Track pilots
- Present dashboards
- Report activity
- Chase productivity

AI INVESTORS

## Compound.

- Define outcomes
- Own workflows
- Attribute returns
- Measure continuously
- Grow the P&L

THE DELTA

**Same technology. Different discipline. Opposite results.**

THREE THINGS TO KNOW

# The signal underneath the noise.

AI SPEND IN 2026

**$2.5T global** **+47% YoY** **83% CFOs raising budgets**

## 01 Budgets are growing. Scrutiny is growing faster.

83% of CFOs plan to raise AI budgets by more than 15% over the next two years. And 25% of planned AI spend has already been postponed to 2027 as CFOs demand proof.

*Your budget is safe if you can name the P&L line. Otherwise it moves.*

## 02 The success metric changed.

Direct financial impact (revenue and profitability) doubled to 21.7% as the leading AI success metric. Productivity gains dropped 5.8 points as a stated success measure.

*Productivity gains no longer earns you funding. Show revenue or cost. That is the new bar.*

## 03 The pilot phase is over.

62% of organisations are now experimenting with agentic AI. Autonomous agents surged 31.5% year-over-year as a top technology priority.

*Your competitors are past pilot. If you are still in pilot, you are behind.*

THE PATTERN I SEE

# The AI budget question has changed.

The old question: how much are we spending on AI?

The new question: what is our AI spending returning?

This is not an AI story. It is a capital allocation story. The tools are cheaper, more capable, and more available than they have ever been. What is rare, and what compounds, is the discipline to measure them against business outcomes.

Boards that adopt the second question will pull years ahead of boards still asking the first.

FOR EVERY AI INITIATIVE, NAME

**The business outcome that moves.**
**The owner accountable for it.**
**The P&L line that will show it.**

IF YOU RUN A P&L

- → Move from licence utilisation to outcome measurement.
- → Move from project sponsors to accountable owners.
- → Move from annual review to continuous measurement.

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SEE YOU NEXT MONDAY

# Weekly signal. Filtered for operators.

*One carousel every Monday. The signals that matter to leaders running organisations, cut from the noise of the week.*

COMING UP IN VOL. 03

- → How three MENA banks quietly moved past the pilot phase
- → Why 'human-in-the-loop' is being redefined this quarter
- → The vendor conversation you should be having

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