

Agentic Arbitrage: When AI Agents Replace Classic Enterprise Software

MANAGEMENT SUMMARY & CORE TAKEAWAY

On July 1, 2026, Gartner published a forecast that should concern every enterprise software buyer: by 2030, up to \$234 billion in enterprise application spending—roughly 20 percent of the SaaS market—is exposed to 'agentic arbitrage.' AI agents complete tasks across multiple systems, rendering traditional UX-driven applications increasingly obsolete. For Swiss organizations with substantial investments in SAP, Salesforce, and Microsoft, this means software budget decisions must be recalibrated, governance gaps closed, and licensing structures rethought—before the arbitrage hits.

CONTEXT & EXECUTIVE RELEVANCE

Agentic arbitrage describes the mechanism by which AI agents autonomously complete tasks across multiple systems—without users needing to open traditional interfaces. Gartner VP George Brocklehurst puts it succinctly: 'Agentic AI changes the economics of software. Agentic systems deliver outcomes directly, bypassing traditional UX-heavy applications and making the software invisible. This breaks the link between user growth and revenue growth for many enterprise software vendors.'

Concretely: instead of an employee logging into SAP S/4HANA to create a purchase order, switching to Salesforce to check customer status, and then requesting approval in Microsoft Teams, an AI agent orchestrates these steps in the background. The agent accesses all three systems via API, executes the transaction, and logs it—without human interaction with the interfaces. Result: the number of required named-user licenses falls, concurrent licenses become obsolete, and the ROI of the original software investment shifts.

CORE ACTION ITEMS

- 01 2026: \$206.5 billion (+139 percent from \$86.4 billion in 2025)
- 02 2027: forecast \$376.3 billion (+82 percent)
- 03 2029: \$752.7 billion at a compound annual growth rate (CAGR) of 119 percent

SWISS COMPLIANCE & ARCHITECTURE GUIDELINES

- ☑ Full compliance with revised Swiss Data Protection Act (revDSG).
- ☑ Zero vendor lock-in on closed proprietary models.
- ☑ Seamless integration into Abacus, Bexio and M365 ecosystems.

Non-Binding Process Analysis

Let us review in 20 minutes where AI agents create immediate measurable efficiency in your workflows.

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