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DAILY MARKET SCAN · FIELD NOTES LIVE

Your enterprise is running 80+ AI agents. Do you know which one just touched the ERP?

Google Cloud shipped cryptographic Agent Identity, Agent Gateway and Model Armor this year. A 2026 survey of 1,900 IT leaders found 96% of enterprises already run agents in production. Only 12% can govern them. Three days out from EU and California transparency law landing on the same date.

96% / 12%

run agents in production / can govern them (OutSystems, 2026)

45:1

non-human identities to human identities in the average enterprise

48%

of production agents run with no monitoring coverage

3 days

until EU AI Act Article 50 and California's AI Transparency Act both bind, Aug 2, 2026

THE READ

Google Cloud consolidated Vertex AI into the Gemini Enterprise Agent Platform this year and shipped the governance layer enterprises have been missing: Agent Identity gives every agent a unique cryptographic ID, Agent Gateway enforces runtime policy on every agent-to-agent and agent-to-tool call, and Model Armor guards against prompt injection and data leakage. The infrastructure is real and it is live. The adoption gap sitting underneath it is bigger than most executives realize.

WHAT THIS MEANS FOR REGULATED-INDUSTRY LEADERS

A 2026 OutSystems survey of 1,900 IT leaders found 96% of enterprises already run AI agents in production. Only 12% say they can govern them. Separate identity-security research puts the scale of the problem in sharper terms: non-human identities, including AI agents, now outnumber human identities roughly 45 to 1 inside the average enterprise, 92% of organizations lack full visibility into those identities, and mean monitoring coverage across production agents sits at 52%, meaning close to half of all agents in production today run unmonitored. Seventy-eight percent of organizations have no documented policy for creating or retiring an AI identity. Eighty-four percent could not currently pass a compliance audit focused on agent behavior or access.

96%	12%	45:1	78%
of enterprises run agents in production	say they can govern their agent fleet	non-human to human identities, average enterprise	have no documented AI-identity lifecycle policy

Read it straight

This is not a tooling shortage. AWS, Google and Snowflake have all shipped real agent-governance infrastructure within the last several months. It is an adoption and ownership gap, and it is compounding at the same rate the agent count is growing: doubling every quarter among the most active deployers.

Frontier & General AI Dynamics

OpenAI reports enterprise ChatGPT and Codex growth tied to its GPT-5.6 series, and launched OpenAI DeployCo, a majority-owned consulting subsidiary with more than $4 billion in initial investment, alongside its acquisition of applied-AI consultancy Tomoro, a direct move into systems-integration territory. Anthropic shipped Claude Opus 5 and is independently tracked as the current leader in enterprise usage share; it did not join NVIDIA's Open Weights letter, which has grown to roughly 50 signatories without Amazon or Anthropic. NVIDIA is reportedly weighing a financing guarantee near $250 billion tied to an OpenAI data center project in Ohio and has invested in Safe Superintelligence.

On the connective-tissue layer, Google, Microsoft, Salesforce, Snowflake, ServiceNow, Cisco, Databricks, GitHub, NVIDIA and Hugging Face backed a new Apache 2.0 standard called Agent Resource Discovery, positioned as an alternative path to Anthropic's Model Context Protocol, which sits at roughly 97 million monthly SDK downloads. Separately, a 28-plus member Open Secure AI Alliance, spanning Adobe, Capital One, Databricks, IBM, Microsoft, NVIDIA, Salesforce, SAP, ServiceNow and Snowflake, formed around open-weight model security after a Hugging Face breach where open-weight tooling reportedly aided forensic remediation faster than closed-source alternatives. Read this as ecosystem hedging on the standards layer, not a verdict on any single protocol.

Snowflake shipped Cortex AI Gateway specifically to control agent sprawl and prevent runaway AI spend, the same cost-then-risk sequencing seen at AWS on Bedrock in the prior edition of this scan, now appearing at the data-platform layer too.

Ecosystem Watch: Google Cloud's Agent Governance Stack

COMPONENT	WHAT IT DOES	WHY IT MATTERS NOW
Agent Identity	Assigns every agent a unique cryptographic ID mapped to authorization policy, enforced below the application tier.	Creates the auditable trail regulators and auditors will ask for starting Aug 2.
Agent Gateway	Control plane / "air traffic control" for agent-to-agent and agent-to-tool traffic; blocks unregistered outbound hosts.	Closes the over-permissioning risk OWASP names as the top structural threat to agentic systems.
Model Armor	Runtime guardrail layer against prompt injection and sensitive data leakage.	Extends the perimeter beyond identity into real-time content risk.
Agent Registry	Centralized catalog of registered agents, tools and servers.	The single-view register most enterprises still do not have, now native to the platform.

Agentic AI Wins and Challenges by Sector

Financial Services

Forty-four percent of finance teams expect to run agentic AI in 2026, up from roughly 6% in 2025. Fifty of the world's largest banks announced more than 160 agentic use cases in 2025, led by real-time compliance monitoring replacing periodic review. KPMG documents an average 2.3x return on agentic AI investment within 13 months, with top performers earning $8 for every $1 invested. EY's 2026 read: institutions pairing agentic AI with strong governance are demonstrating regulatory leadership, not attracting extra scrutiny.

Healthcare

WellSpan Health's 13-month deployment of an AI voice agent logged close to 2 million patient conversations across outreach and inbound call management, evidence agentic AI is operating as a system-wide capability rather than a pilot. More than 80% of healthcare executives in a 2026 Deloitte survey expect agentic AI to deliver significant clinical and back-office value. AI scribe tools are cutting physician charting time 40 to 45 percent and clinical note error rates 25 to 30 percent among adopters.

Manufacturing

Named production deployments now include Siemens, Bosch, GE Vernova and Schneider Electric, spanning engineering productivity, vision-based quality inspection, grid decision support and multi-site energy optimization. Companies with agents in production report roughly 34% average gains in both production efficiency and supply-chain efficiency.

Energy & Utilities

Energy monitoring and optimization ranks among the top-three near-term AI priorities for about 40% of manufacturers surveyed, and utility-scale deployments from GE Vernova and Schneider Electric show capital moving ahead of governance maturity, the same identity and access gap seen in finance and healthcare, with higher physical-safety stakes attached.

Field Notes Live: This Week's Question

Field Notes Live | Issue: Agent Identity

You have five AI models talking to five different systems. Do you know which agent is which?

Ninety-six percent of enterprises run AI agents in production. Only 12% can govern them. We are asking operators one question this week, live on LinkedIn and X:

What is actually stopping your team from governing its AI agent fleet today?

- No agent identity strategy exists yet
- We have policy on paper, not enforcement
- Tooling exists, nobody owns wiring it together
- We think we are already covered

Responses feed directly into Friday's Reg-Ready Field Note and this week's weekly digest. Vote on LinkedIn or X, or reply with where your organization actually stands.

Regulatory Watch

EU AI Act Article 50 transparency obligations bind August 2, 2026, three days from this edition. Unlike most of the Act, Article 50 applies instantly to all in-scope systems regardless of when they were deployed, covering AI-interaction disclosure, AI-generated content labeling, emotion-recognition and biometric-categorization notice, and deepfake or synthetic public-interest content labeling. Penalties run up to €15 million or 3% of global annual turnover.

California's AI Transparency Act also becomes operative August 2, 2026, the identical date as the EU's Article 50. Any enterprise serving both EU and California users faces two independent transparency regimes activating on the same day.

Texas's Responsible AI Governance Act (HB 149) has been in force since January 1, 2026, currently the broadest in-force US state model. **Colorado**'s rebuilt SB 26-189, signed May 14, 2026, now starts January 1, 2027 for covered automated decision technology.

Workforce Lens

The World Economic Forum finds more than 1 in 3 young workers globally sit in occupations with medium-to-high AI task exposure, and employers expect 39% of workers' core skills to change by 2030. Deloitte's 2026 Global Human Capital Trends report finds only 6% of leaders say they are making real progress designing how humans and AI actually work together day to day. McKinsey and PwC data show the most AI-exposed companies have tripled their productivity-growth lead since 2022, with the top quintile of AI-exposed firms averaging 163% productivity growth. US job postings requiring AI skills grew 144% year over year as of April 2026, and workers with demonstrable AI competencies earn roughly 56% more than peers without them.

39%
of core worker skills expected to change by 2030 (WEF)

6%
of leaders making real progress on human-AI collaboration design (Deloitte)

163%
avg productivity growth, top quintile AI-exposed firms

+56%
wage premium for demonstrable AI skills

Ariana.Digital Take

The platforms have stopped waiting for enterprises to ask for agent governance; they are shipping it ahead of demand. That is good news for anyone who acts on it in the next three days, and a real exposure for anyone who does not. The fix does not require a platform migration or a new vendor. It requires one register: every agent your organization runs, the identity or credential it operates under, the gateway or guardrail policy attached to it, the systems it can reach, a named owner, and a flag for EU or California-facing use. Build that this week, before August 2, and you walk into two simultaneous transparency regimes with an answer already in hand.

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Sidley

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Glacis

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