The Economic Potential of Generative AI — Methodology Review

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Document control

Field	Value
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Research cut-off	31 October 2026
Status	Independent source review — not an external audit
Publication type	Bottom-up global use-case and work-activity opportunity sizing
Source policy	Original public material only; no Dodone adaptation
Full source links	See section 14

Executive summary

McKinsey combines estimates of generative AI value across 63 enterprise use cases with assessments of technical automation of work activities. The research reports substantial global annual economic potential, while explicitly distinguishing technical potential from the pace and economics of realised adoption.

Scope: Estimate technical and economic potential of generative AI across business functions, tasks and occupations.

Important: This paper documents published source material only. A missing equation or input is reported as not available in the reviewed sources; no substitute model or artificial worked example has been created.

1. Purpose and scope

Estimate technical and economic potential of generative AI across business functions, tasks and occupations. This paper is an independent explanatory analysis of published methodology; it is not endorsed by the originating publisher.

2. Counterfactual and baseline

For use cases, the baseline is existing business-functional activity before generative AI. For work-activity analysis, capabilities are compared with human task requirements and previous automation technology estimates. The research is a global opportunity appraisal, not a single-company before/after assessment.

3. Published model inputs and variables

- 63 use cases across 16 business functions.
- More than 2,100 detailed work activities and approximately 850 occupations.
- Task time, technical capabilities and automation exposure.
- Economic activity/value estimates at function and industry level.
- Adoption and workforce transition considerations.

4. Cost methodology

The published report assesses economic potential, including technical automation exposure and labour productivity implications. A complete standard enterprise procurement, model-inference, governance and integration cost equation is not supplied as a universal calculation.

5. Benefit and value methodology

Value is estimated for use cases and for expanded technical automation potential of knowledge work. High-value functions include customer operations, marketing and sales, software engineering, and research and development.

6. Published formulas and calculation logic

- Published result is a combined opportunity-sizing framework; an executable single-firm ROI equation is not specified.
- Use-case values and occupation/activity technical automation estimates are different perspectives and should not be added without addressing overlap.

7. Publisher-reported worked examples or results

The publication estimates $2.6 trillion to $4.4 trillion in annual global economic value across its 63 analysed use cases; these are global opportunity estimates, not realised company ROI.

8. Sensitivity, attribution and uncertainty

The work discusses uncertainty, feasibility and adoption speed; economic potential assumes that tasks and workflows can be implemented over time. Its global value range is not a probabilistic company ROI interval.

9. Author-scope qualifications and methodological limitations

- Technical capability does not establish organisational adoption or financial realisation.
- Global opportunity estimates cannot be treated as realised revenue or margin for an individual company.
- Subsequent technological change can alter the technical automation frontier.

10. Independent reproducibility assessment

Partial. Published activity categories and high-level opportunity outputs can be inspected, but the underlying global research aggregation cannot be rebuilt solely from the public article.

11. Public-information gap register

Information unavailable or incomplete	Source review status
Uniform, auditable per-company ROI formula: not presented in the reviewed publication.	Not publicly available / insufficiently specified in reviewed source
Complete individual task-level underlying dataset and calculation code: not publicly established here.	Not publicly available / insufficiently specified in reviewed source
Standard company AI licence, rollout, inference or governance defaults: not specified as a single input library.	Not publicly available / insufficiently specified in reviewed source

12. Independent reviewer observations

These observations address verifiability and scope; they are not additions to the publisher's financial method.

Confirm each numerical claim against the original publication before relying on it for an investment decision. Do not treat conceptual frameworks or opportunity estimates as if they were a reproducible company-level ROI algorithm.

Do not fill source gaps using assumed discount rates, value multipliers, proprietary weights, industry benchmarks, model code or synthetic test fixtures. An independent audit of calculations is possible only where sufficient primary data and methodology are disclosed.

13. Audit and publication checklist

- Primary publisher and publication dates have been identified.
- Source-specific equations are separated from descriptive process narratives.

- All author-reported numerical examples are identified as publisher examples.
- Unavailable parameters and proprietary elements are explicitly marked.
- No Dodone adaptations or fabricated examples have been introduced.
- Claims of complete numerical reproducibility are limited to publicly verifiable material.

14. Original source links and attribution

The following are the original publisher resources reviewed. Each link is clickable in the PDF and editable Word file.

S1 — The economic potential of generative AI: The next productivity frontier — https://www.mckinsey.com/capabilities/tech-and-ai/our-insights/the-economic-potential-of-generative-ai-the-next-productivity-frontier

Research cut-off: 31 October 2026. Access conditions and source text may subsequently change.

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