

Gardener Research

Market Report

AI Capability Information

No	Capability	Skew	Gov Employment
C1	Generative AI	Heavily Commercial	↓
C2	Traceability / Attribution / Analytics	Heavily Defense	↑↑
C3	Workflow / Logistics / Supply Chain	Mostly Commercial	↓↓
C4	All-Domain Autonomous Defense	Heavily Defense	↑↑
C5	Virtual Assistants / AI Bots	Mostly Commercial	↓↓↓
C6	Biological Models	Mostly Commercial	↑
C7	Foreign Language Processing	Mostly Defense	↓
C8	Advanced Cybersecurity	Strongly Both	↑↑

Private Sector Spend on AI Capabilities at End of Scene

	Scene 1	Scene 2	Scene 3	Scene 4	Total
C1	\$50M	\$150M	\$300M	\$500M	\$1,000M
C2	\$25M	\$45M	\$70M	\$100M	\$240M
C3	\$30M	\$50M	\$150M	\$400M	\$630M
C4	\$10M	\$25M	\$40M	\$70M	\$145M
C5	\$10M	\$30M	\$200M	\$600M	\$840M
C6	\$10M	\$15M	\$75M	\$400M	\$500M
C7	\$10M	\$30M	\$60M	\$75M	\$175M
C8	\$50M	\$120M	\$225M	\$500M	\$895M
Total	\$195M	\$465M	\$1,120M	\$2,645M	\$4,425M