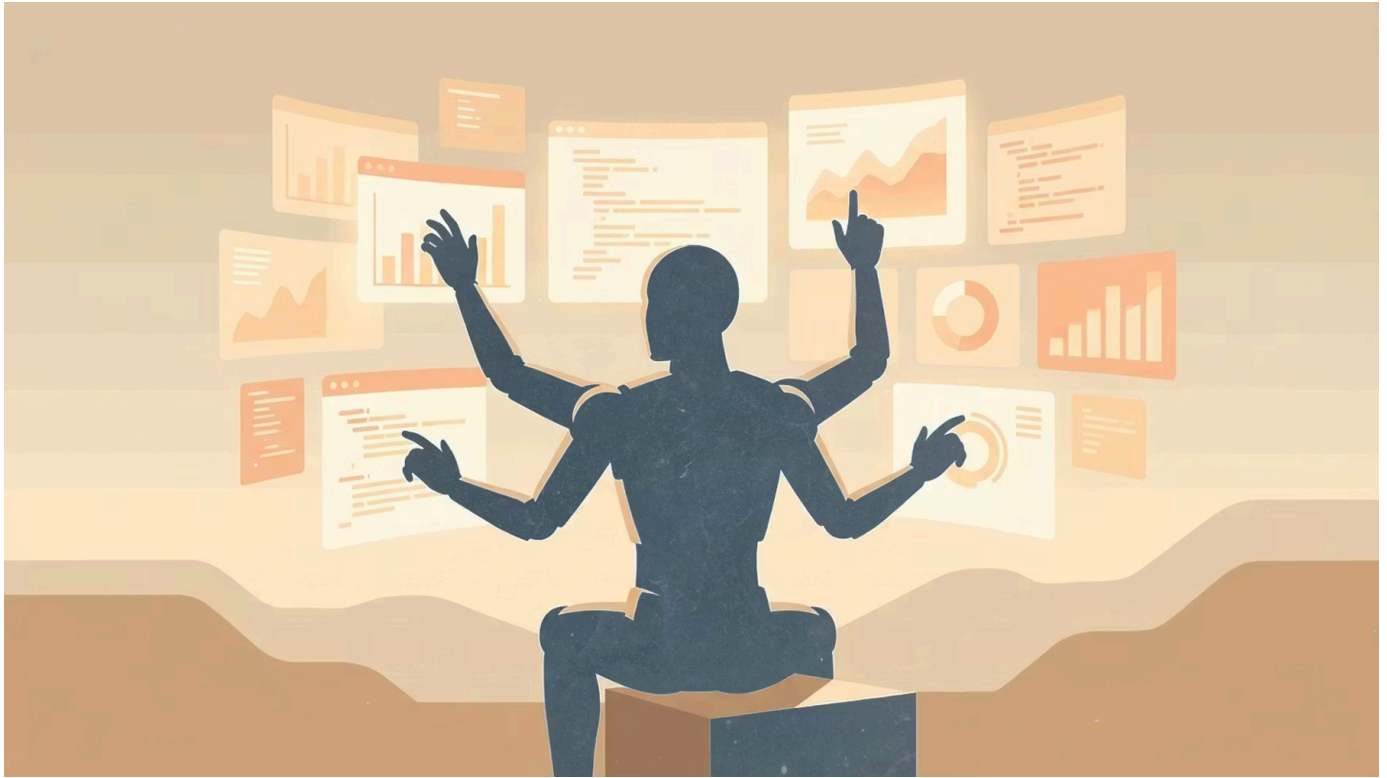# A New AI Superagent Race Is Pitting OpenAI and Anthropic Against Microsoft and Salesforce



Art via Mike Sullivan

By Aaron Holmes and Kevin McLaughlin

Feb 12, 2026, 6:00am PST

**Even as Anthropic** and OpenAI unnerve stock market investors with business-focused AI products that could undermine existing enterprise software firms, the software incumbents are trying to catch up. Companies ranging from Microsoft to ServiceNow and Snowflake have come out with products designed to help customers develop AI agents, sometimes called digital co-workers, that can use a variety of enterprise apps just as humans do.

But that's not all. As the chart below demonstrates, almost all of the AI and software companies are selling agent-building tools that enable customers to cobble together different custom AI agents for their specific needs. And the tech companies are also vying to sell an application customers use to manage the growing suite of AI agents they're employing from various vendors.

T h e   T a k e a w a y

OpenAI and Anthropic challenge enterprise software firms with AI agents.

Tech companies vie to sell agent-building tools and management dashboards.

New AI agents face security liabilities and adoption challenges for users.

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That raises the question of how many agent management dashboards—as some companies call these hubs—the industry needs. Every customer will presumably require only one.

The chart below shows which software sellers are competing in the newer categories of AI agent products. They include:

- **Browser-based agents** from the likes of OpenAI, Google and others that perform multistep tasks such as logging into a vendor's website to place an order

- **Computer-using agents** such as Anthropic's Cowork, Google's Gemini Computer Use and ServiceNow's desktop agent, which can use desktop applications and files to generate financial reports

- **Tools for creating agents** that can access a wide variety of enterprise apps, such as Salesforce's Agentforce and Google's Gemini Enterprise

- **Dashboards for managing agents** from various providers, also known as agent operations platforms, which include Microsoft's Agent 365 and OpenAI's Frontier

These tech companies are largely betting on a future in which white-collar workers no longer manually use different enterprise apps at work. Instead, they'll oversee a suite of AI agents that connect to applications on their own, either through application programming interfaces or by taking over desktops and browsers to perform computer work in the way humans do.

Anthropic's Cowork and OpenClaw, an open-source computer-using agent that has gone viral among software engineers, have already gotten the attention of Microsoft CEO Satya Nadella and other top technology executives.

# Rise of the Agents

A look at major companies that have launched products that let customers automate complex, multi-step tasks

**Launched**  **Preview**  **Not launched**

| Company | Browser-Based Agent | Computer-Use Agent | Agent builders | Agent Management Dashboard |
|---|---|---|---|---|
| OpenAI | | | | |
| Anthropic | | | | |
| Microsoft | | | | |
| AWS | | | | |
| SAP | | | | |
| Google | | | | |
| Manus (Meta*) | | | | |
| Oracle | | | | |
| Salesforce | | | | |
| ServiceNow | | | | |
| Databricks | | | | |
| Snowflake | | | | |

*Meta has agreed to acquire Manus

Nadella has been waiting for such a moment. He said on the BG2 podcast in late 2024 that over time, traditional software applications will "collapse in the agent era" because they are "essentially ... databases with a bunch of business logic."

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Microsoft has even publicly talked about charging subscription fees to future AIs that access its apps, similar to the way it charges human workers today.

A lot has to happen before these agents become widely used. The newfangled browser- and computer-using agents still carry enormous security liabilities because they can inadvertently disclose a user's credentials or enable a remote attacker to take control of PCs. And some AI buyers say these products are far too difficult to use.

Some of the companies are making bolder claims about how ready these types of agents are to be used in the workplace. While OpenAI, Anthropic, and Google said their computer-using agents are only available in research previews, implying they aren't ready for large enterprises to adopt, vendors like ServiceNow—which rely on models from AI firms including OpenAI and Anthropic—have said their computer-using agents are generally available.

Meanwhile, OpenAI and Anthropic are ratcheting up the pressure. On Tuesday, Anthropic made Cowork available in a research preview to Windows computer customers. Microsoft has spent months developing similar tools that could take over Windows tasks and has previewed some of those features.

Last week OpenAI launched Frontier, which aims to help businesses such as Uber and Thermo Fisher Scientific create multiple AI co-workers and assign them different tasks that involve pulling in data from various applications.

**'Systems of Record'**

OpenAI didn't specify which well-known enterprise apps its AI would use to perform these tasks. But it included a graphic in its blog post about Frontier, showing how its technology for directing these agents would sit on top of companies' "systems of record." That's a reference to applications made by firms such as Microsoft and Salesforce that store critical corporate data.

Some executives at traditional enterprise application firms said they viewed OpenAI's Frontier graphic as the company's way of showing the heavy influence it wants to have over how businesses use and pay for software and AI.

So far, traditional enterprise app firms such as Salesforce or Microsoft don't appear to be preparing to outright block these new AI agents from using, tapping or modifying data in major existing apps like Salesforce's customer relationship management software or Microsoft's Office 365 productivity app suite.

Nadella, in the 2024 podcast, said there wasn't much his firm could do to stop someone from using an AI agent from accessing applications on the company's Windows-powered devices.

But some executives in the AI field believe the enterprise app firms could try to limit how frequently AIs can access the apps or the data they store. A version of this happened last spring when Salesforce's Slack chat app prevented other AI and software companies from searching or storing Slack messages even if their customers permit them to do so.

Ironically, many of the traditional enterprise firms have been powering their own agents with technology they purchased from OpenAI and Anthropic, even as those AI firms try to convince workers to use their own competing tools and apps. (Those include premium versions of ChatGPT and Claude chatbots, which workers can use to access traditional enterprise apps and automate tasks involving spreadsheets or CRMs.

**'$1 Trillion…Or Zero'**

Last fall, for instance, database firm Snowflake released a product powered by models from those AI firms to help its customers develop agents that can search for and get data on their sales or other corporate metrics. The agents tap information that resides in Snowflake databases or in apps such as Microsoft Teams and those of Salesforce and SAP.

Because AI is breaking down traditional barriers and enabling new competition, leaders of software firms feel like "either they go to a $1 trillion valuation or they go to zero," Snowflake CEO Sridhar Ramaswamy said at the time.

For their part, AI customers say there's a growing need for tools that manage and connect AI agents, but they're cautious about where to spend money.

"When I look at Salesforce and Oracle and all the other agents that I need to bring together, there's a conversation happening of who manages that data, where does it reside, do we need to have multiple agents bringing it together and controlled by one superagent—these are all active discussions," said Onkar Birk, chief technology officer of Hilton Grand Vacations, a time-share rental firm with more than $5 billion in annual revenue.

So far, the company has relied on a mix of AI products from OpenAI, Microsoft, Salesforce, Oracle and other vendors to run internal agents that automate tasks like forecasting revenue and staffing needs. It has also launched an AI agent powered by software from Cresta, a startup whose product is powered in part by OpenAI and Anthropic technology, to answer customers' questions about which properties are available to book.

Despite the abundance of new AI agent products, Birk said he's not rushing to sign up for new subscriptions.

"It's easy to say this is simple, but it's really not—it takes a lot of time to get results," Birk said, noting that the company spent nearly three years developing its customer support agent before launching it to customers. "This is not a simple architecture to invest in."

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