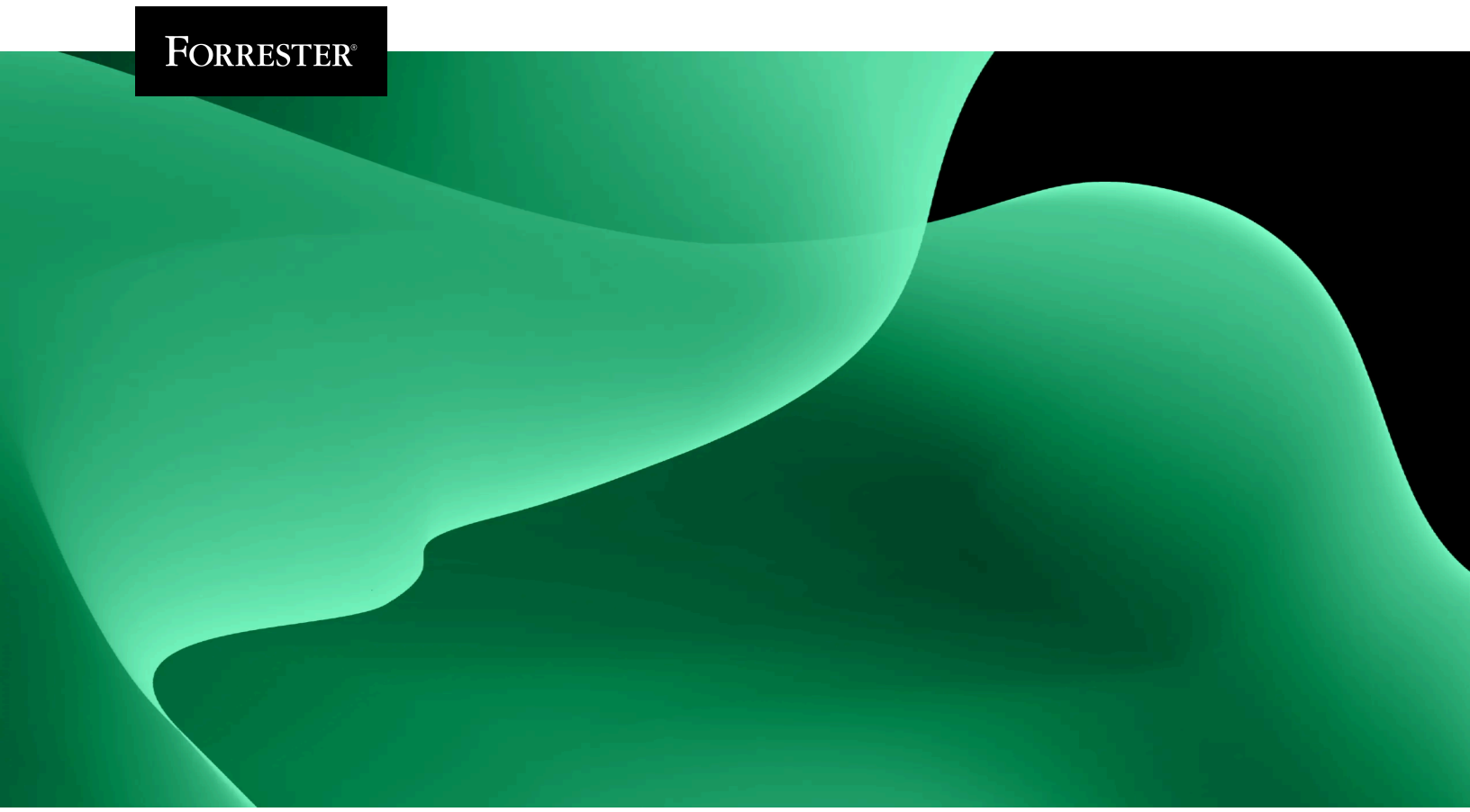
Total Economic Impact

New Technology: The Projected Total Economic Impact™ Of Microsoft Copilot+ PCs

Cost Savings And Business Benefits Enabled By Copilot+ PCs

A FORRESTER NEW TECHNOLOGY PROJECTED TOTAL ECONOMIC IMPACT STUDY COMMISSIONED BY MICROSOFT, JULY 2025



Executive Summary

Across industries, today's businesses face converging challenges that include rising operational costs, global workforces, and new, disruptive technologies. To stay agile and competitive, many organizations are exploring AI-enhanced solutions to empower their workforce and drive operational efficiency. Conventional PCs built for general-purpose computing are ill-equipped for the surge in AI workloads. In contrast, PCs purpose-built for AI deliver the on-device intelligence and performance needed to meet these modern challenges.

Copilot+ PCs are a new class of Windows PC that add a high-performance neural processing unit (NPU) alongside the CPU and GPU processors. Dedicated to handling complex AI tasks directly on the device, the NPU enables capabilities like natural language processing, image and video enhancement, and context-aware task automation. Copilot+ PCs leverage the NPU for new Windows features including Recall (preview) with IT controls, Click to Do (preview), Windows Studio Effects, and Live Captions with real-time translation.[1] AI assistance is integrated into Windows apps and workflows, offering fast performance, extended battery life, and the security and manageability that organizations require.

Microsoft commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential return on investment (ROI) enterprises may realize by deploying Copilot+ PCs.[2] The purpose of this study is to provide readers with a framework to evaluate the potential financial impact of Copilot+ PCs on their organizations.

137%–367%

Projected return on investment (ROI)

$2,879,365–$7,687,382

Projected net present value (NPV)

To better understand the benefits, costs, and risks associated with this investment, Forrester interviewed nine decision-makers with experience using Copilot+ PCs. For the purposes of this study, Forrester aggregated the interviewees' experiences and combined the results into a single composite organization, which is a global organization with 2,000 employees and $1 billion annual revenue.

Interviewees said that prior to deploying Copilot+ PCs, their organizations relied on manual search and content creation, wrestled with inconsistent performance and frequent issues on legacy devices, and ran fragmented AI pilots on aging hardware. Legacy devices left organizations with slow workflows, constant context switching, and support backlogs. These limitations led to wasted employee time, uneven collaboration across hybrid teams, and delayed strategic initiatives.

After the investment in Copilot+ PCs, interviewees reported consistently responsive, reliable devices powered by on-chip AI and hardware protections, along with significantly longer unplugged run times. Native AI capabilities and device-centric automations simplified routine tasks and accelerated everyday workflows, while built-in meeting enhancements elevated virtual collaboration and accessibility. Key results included amplified end-user efficiency, improved IT operations (ITOps) efficiency, and reduced risk of security breach exposure.

Key Findings

Quantified projected benefits. Three-year, risk-adjusted present value (PV) quantified benefits for the composite organization include:

- **Amplified end-user efficiency.** Copilot+ PCs' dedicated NPUs accelerate AI search and automation in features such as improved Windows search, Recall, and Click to Do (preview), while fast performance from advanced chips and

architecture keeps users in flow. The projected efficiency improvement ranges from 6% to 13% across the workforce and is worth a three-year projected present value of $4.9 million to $9.6 million.

- **Improved ITOps efficiency.** Features that reduce help desk tickets for the composite include support for NPU-powered device self-healing, streamlined provisioning, easy setup, and faster issue triage via Secured-core safeguards, which enable four device support FTEs to refocus on high-value projects. The projected time saving on ongoing device management ranges from 20% to 30% and the reduction in help desk effort is 10% to 50%. These impacts are worth a three-year projected present value of $53,000 to $92,000.
- **Reduced risk of a security breach.** Built-in Microsoft Pluton security processors, virtualization-based safeguards, and support for AI threat detection at the chip level accelerate containment of addressable attacks, worth a three-year projected present value of $22,000 to $66,000.

Unquantified benefits. Benefits that provide value for the composite organization but are not quantified for this study include:

- **Improved employee experience from new, high-performing, AI-enabled devices.** Employees across roles — from customer support to finance — report smoother multitasking and faster context switching on Copilot+ PCs, reducing frustration and boosting day-to-day engagement.
- **Enhanced customer outcomes through AI-accelerated workflows.** Customers reported noticeable gains in data fidelity and decision speed with Copilot+ PCs, achieved by offloading intensive imaging and analytics to on-device AI — enabling more proactive service delivery and better customer satisfaction.
- **Improved meeting quality with enhanced accessibility and global collaboration.** Windows Studio Effects delivers enhanced audio/video, while Live Captions with real-time translation enable multilingual teams to collaborate with partners and customers worldwide efficiently and professionally.
- **Increased alignment with sustainability goals through power-efficient devices.** Copilot+ PCs' optimized power management and longer battery life cut electricity draw in offices and labs, supporting lower carbon footprints and reinforcing corporate environmental commitments.

Costs. Three-year, risk-adjusted PV costs for the composite organization include:

- **Copilot+ PC devices.** The composite purchases 1,600 Copilot+ PCs at an average cost of $1,320 each, with a projected three-year present value of $2,025,000.
- **Planning and provisioning.** ITOps efforts related to the planning, configuration, and provisioning of Copilot+ PCs have a projected three-year present value of $70,000.

Forrester modeled a range of projected low-, medium-, and high-impact outcomes based on evaluated risk. This financial analysis projects that the composite organization accrues the following three-year net present value (NPV) for each scenario by enabling Microsoft Copilot+ PCs:

- Projected high impact of a $7,687,382 NPV and projected ROI of 367%.
- Projected medium impact of a $5,677,060 NPV and projected ROI of 271%.
- Projected low impact of a $2,879,365 NPV and projected ROI of 137%.

> *"It is clear that our next-generation platform ... will be using Copilot+ PCs as a default."*
>
> **Endpoint management architect, consumer goods**

Key Statistics

137%–367%

Projected return on investment (PROI)

$4.97M–$9.78M

Projected benefits PV

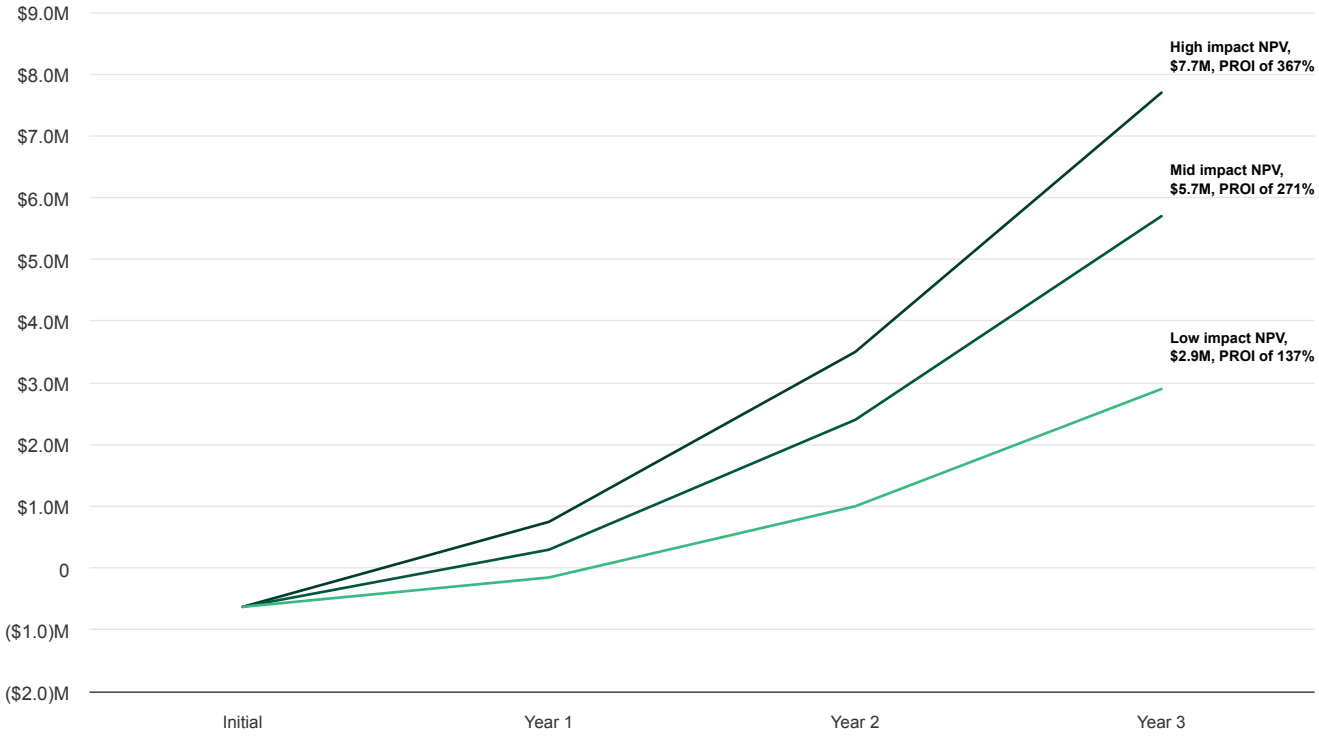
$2.88M–$7.69M

Projected net present value (PNPV)

$2.1M

Total costs

Three-Year Projected Financial Analysis For The Composite Organization



The Microsoft Copilot+ PCs Customer Journey

Drivers leading to the Copilot+ PCs investment

Interviews				
Role	**Industry**	**Region**	**Employees**	**Copilot+ PCs**
Vice president, information security	Hospitality	Global	25,000	600
Senior vice president	Healthcare	Global	200,000	200
Global director of IT	Retail/wholesale	Global	2,600	200
CIO	Healthcare	North America	1,800	150
Senior IT engineer	Travel	EMEA	600	60
Enterprise applications engineer	Healthcare	North America	10,000	40
Vice president of IT	Manufacturing	Global	50,000	25
IT manager	Municipal government	North America	1,000	20
Endpoint management architect	Consumer goods	Global	17,000	20

Key Challenges

Before Copilot+ PCs, interviewees' organizations relied on a mix of older Windows 10 and 11 devices that weren't optimized for AI workloads, impacting employees and IT staff. Help desk teams fielded frequent, repetitive requests. Interviewees noted how their organizations struggled with common challenges, including:

- **Diminishing device performance and battery life.** As devices aged, processors and batteries struggled to keep up with new and demanding workloads. Users experienced slower application launches and shorter unplugged run times — forcing them to pause work for recharges or wait on sluggish hardware.
- **Manual search and repetitive tasks.** Employees spent substantial time locating files, rebuilding documents, and switching applications, leading to errors and delays. These mundane activities diverted talent from higher-value work and slowed project delivery.
- **High volumes of routine support requests.** Everyday issues such as camera setups, VPN drops, or driver updates generated frequent tickets that consumed IT capacity. Addressing these easily fixed problems pulled resources away from strategic initiatives and innovation.

> *"There's been a desire to adopt AI capabilities in more use cases across the organization."*
>
> **Vice president, information security, hospitality**

> *"[With Copilot+ PCs,] you're putting equipment in place that you know is going to bring value to the organization now and in the future. … You're futureproofing that group."*
>
> **Global director of IT, retail/wholesale**

> *"The real magic comes from the actual quality of the computer."*
>
> **Vice president of IT, manufacturing**

Composite Organization

Based on the interviews, Forrester constructed a TEI framework, a composite company, and an ROI analysis that illustrates the areas financially affected. The composite organization is representative of the interviewees' organizations, and it is used to present the aggregate financial analysis in the next section. The composite organization has the following characteristics:

- **Description of composite.** The global organization has $1 billion annual revenue and 2,000 device users, 80% of whom work on a mixed device estate of Windows 10 and 11 PCs.
- **Deployment characteristics.** The composite provisions 400 Copilot+ PCs at the start of Year 1 and an additional 400 by year end. In Years 2 and 3, it deploys 400 additional devices each year to cover the remaining Windows PC users.

KEY ASSUMPTIONS

- $1 billion revenue
- 1,600 Windows PC users

Analysis Of Benefits

Quantified benefit data as applied to the composite

Total Projected Benefits					
Benefit	**Year 1**	**Year 2**	**Year 3**	**Total**	**Present Value**
Total projected benefits - Low	$1,120,052	$1,989,051	$3,077,401	$6,186,504	$4,974,171
Total projected benefits - Mid	$1,614,580	$3,128,786	$4,949,048	$9,692,414	$7,771,866
Total projected benefits - High	$2,110,403	$3,915,549	$6,159,399	$12,185,351	$9,782,188

Amplified End-User Efficiency

Evidence and data. Interviewees described a variety of ways that Copilot+ PCs amplified their day-to-day productivity through a combination of modern hardware, operating system enhancements, and built-in AI features:

- The IT manager in municipal government said, “The number one feedback is the speed of the device and responsiveness — just being able to turn it on and have everything ready to go.”
- The IT manager added: “The added battery life enhancements will be a huge benefit. [Users] have commented on several additional hours’ worth of use.”
- The senior IT engineer in the travel industry said, “The battery life is infinitely better compared to the devices we had before.”
- The global director of IT in retail/wholesale said: “We have a lot of documents, a lot of historical information, that’s very hard to find. … The improved Windows searches [are] a significant benefit for us. … And the Recall feature — we’ve gotten such good feedback on how people can easily look up what they’ve done over a period of time.”
- The global director of IT added, “[Employees] are able to do tasks 30% faster than they could on the previous hardware.”
- The vice president of information security in hospitality said: “[We have seen] the ability to more efficiently multitask. [Copilot+ PCs] help optimize resources as well as help the user better manage [applications]. … Search is a big one — it’s much easier to find contextual data within emails or files across your device than on a traditional asset or endpoint.”
- The endpoint management architect in consumer goods stated, “You don’t have to worry about your equipment. It’s just working.”
- Several interviewees noted that one-click automations with Click to Do (preview) and the Copilot button removed repetitive steps and accelerated ad hoc tasks.
- Interviewees also praised faster app launches, file loads, and meeting features that contributed to greater efficiency.
- A few interviewees described plans to introduce more local AI assistants (e.g., offline document helpers, on-device analytics, etc.) to further leverage the NPU.

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Of the 2,000 device users, 80% use Windows PCs.
- In Year 1, the composite deploys 800 Copilot+ PCs, and it deploys 400 additional Copilot+ PCs in both Year 2 and Year 3.
- Power users comprise 10% of Windows device users (160 individuals) and are in roles that demand frequent AI-driven interaction, such as field sales and consulting teams who rely on all-day battery life; executive assistants and

marketing professionals who generate and refine complex documents; and data scientists, business intelligence analysts, and software engineers who run large models and routinely leverage local AI apps.

- All 160 power users receive Copilot+ PCs in Year 1 and amplify their efficiency by 1.5 to 2.5 hours per week on day-to-day work through Recall and improved Windows search, Click to Do (preview), local AI agents, and the high-performance NPU and battery — expediting a significant portion of regular tasks and workloads and reducing support calls.
- In Years 2 and 3, as the composite rolls out more local AI applications and teams grow more proficient, power user efficiency gains increase by 2 to 3.75 hours per week in Year 2 and 2.5 to 5 hours per week in Year 3.
- The fully burdened hourly rate for a power user is $66.
- The remaining 90% of Windows users are general users who perform standard office tasks, such as email, document editing, light data lookup, and intermittent AI use. General users amplify their efficiency between 1 and 2 hours per week in Year 1, and these gains increase to between 1.5 and 3 hours per week by Year 3.
- Efficiency gains are directed toward other value-added work at a rate of 50%.

Results. This yields a three-year projected PV ranging from $4.9 million (low) to $9.6 million (high).

$4.9 million to $9.6 million

Amplified end-user efficiency

> *“We had users move to [Copilot+ PCs] and they were just blown away. … The issues they had with the battery lifetime were gone. … What we have seen in our benchmarks is around 16 hours compared to 4 hours before. That’s insane.”*
>
> **Endpoint mangement architect, consumer goods**

Amplified End-User Efficiency					
Ref.	**Metric**	**Source**	**Year 1**	**Year 2**	**Year 3**
A1	Total end users	Composite	2,000	2,000	2,000
A2	End users using Windows-based PCs	A1*80%	1,600	1,600	1,600
A3	Cumulative end users receiving Copilot+ PC	Composite	800	1,200	1,600
A4	Windows PC power users with Copilot+ PC	A2*10%	160	160	160
A5	Fully burdened hourly rate for power users	Composite	$66	$66	$66
$A6_{Low}$			1.50	2.00	2.50
$A6_{Mid}$	Amplified power-user efficiency from Copilot+ features (hours per week)	Interviews	2.00	3.00	3.50
$A6_{High}$			2.50	3.75	5.00
A7	Windows PC general users	A2*90%	1,440	1,440	1,440
A8	Windows PC general users with Copilot+ PC	Year 1: A3-A4; Year 2-3: prior year + (25%*A2)	640	1,040	1,440
A9	Fully burdened hourly rate for general users	Composite	$44	$44	$44
$A10_{Low}$			1.00	1.25	1.50
$A10_{Mid}$	Amplified general user efficiency from Copilot+ features (hours per week)	Interviews	1.50	2.00	2.50
$A10_{High}$			2.00	2.50	3.00
A11	Productivity recapture	Composite	50%	50%	50%
At_{Low}		((A4*A5*A6Low*A11)+ (A8*A9*A10Low))*A11*50	$1,100,000	$1,958,000	$3,036,000
At_{Mid}	Amplified end-user efficiency	((A4*A5*A6Mid*A11)+ (A8*A9*A10Mid))*A11*50	$1,584,000	$3,080,000	$4,884,000
At_{High}		((A4*A5*A6High*A11)+ (A8*A9*A10High))*A11*50	$2,068,000	$3,850,000	$6,072,000
	Three-year projected total: $6,094,000–$11,990,000		**Three-year projected present value: $4,899,174–$9,623,802**		

Improved ITOps Efficiency

Evidence and data. Interviewees described how Copilot+ PCs reduced routine support loads for the device support team through AI-driven device stability and self-service capabilities, unlocking capacity for higher-value projects.

- The IT manager in municipal government explained: “We have a lot of requests to help find documents. … Copilot+ PCs seem to prevent that from happening. … It’s like having support staff built into the computer for them. … [Copilot+ PCs] are taking care of it and lifting a lot of that burden from us. … I feel like at least 80% of questions could be answered through [the device].”
- The senior IT engineer in travel added: “I expect [initial ticket volume] to decrease by 25% or 30%. … [Copilot+ PCs] will save us a lot of time.”
- The vice president of information security in hospitality projected a 50% reduction in device-related help desk requests.
- The CIO in healthcare said: “We’ve decreased [support tickets] over time. [Copilot+ PCs are] the reason why there are more IT people available for strategic initiatives.”

- The senior IT engineer in travel said: “The actual imaging process and the speed in which the device installs applications and things … is a lot quicker. …[New users have said] it took them only 15 minutes and they were set up and ready to go. Before, it would have been 45 minutes to an hour. … Coming from people in departments that aren’t typically interested in technology, that’s some really good feedback.”

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- The ITOps team includes four device support FTEs who dedicate 25% of their time to ongoing device management tasks.
- Copilot+ PC deployment ramps up from 50% of all Windows PCs in Year 1 to 75% in Year 2 and 100% in Year 3, reflecting the organization’s refresh schedule.
- Enhanced endpoint reliability and support for proactive diagnostics on Copilot+ PCs reduce time spent on routine device management by 20% to 30%.
- The average fully burdened annual salary for ITOps personnel is $127,000.
- End users average one help desk request per month prior to receiving a Copilot+ PC, and 10% of these requests are related to operating system or hardware issues.
- After deployment, help desk requests tied to operating system and hardware issues decline by 10% to 40% in Year 1 and by 15% to 50% in Year 2 as device reliability and in-line troubleshooting improve.
- The average time spent on a help desk request is 15 minutes.
- The fully burdened hourly rate for help desk staff is $54.

Results. This yields a three-year projected PV ranging from $53,000 (low) to $92,000 (high).

> *“The overall support cost will be less for Copilot+ PCs.”*
>
> **Senior vice president, healthcare**

Improved ITOps Efficiency					
Ref.	**Metric**	**Source**	**Year 1**	**Year 2**	**Year 3**
B1	Device support FTEs	Composite	4	4	4
B2	Time spent on ongoing device management	Composite	25%	25%	25%
B3	Portion of Copilot+ PCs deployed	A3/A2	50%	75%	100%
$B4_{Low}$			20%	20%	20%
$B4_{Mid}$	Time saved	Interviews	25%	25%	25%
$B4_{High}$			30%	30%	30%
B5	Fully burdened annual salary for ITOps personnel	Composite	$127,000	$127,000	$127,000
$B6_{Low}$		B1*B2*B3*B4Low*B5	$12,700	$19,050	$25,400
$B6_{Mid}$	Improved ITOps efficiency	B1*B2*B3*B4Mid*B5	$15,875	$23,813	$31,750
$B6_{High}$		B1*B2*B3*B4High*B5	$19,050	$28,575	$38,100
B7	Help desk requests per user per month	Composite	1	1	1
B8	Total help desk requests	A2*B7*12	19,200	19,200	19,200
B9	Help desk requests related to OS/PC	Composite	10%	10%	10%
$B10_{Low}$			10%	15%	15%
$B10_{Mid}$	Reduction in help desk effort attributed to Copilot+ PCs	Interviews	20%	35%	35%
$B10_{High}$			40%	50%	50%
B11	Average time spent per help desk request (hours)	Composite	0.25	0.25	0.25
B12	Fully burdened hourly rate for help desk staff	Composite	$54	$54	$54
$B13_{Low}$		B8*B9*B10Low*B11*B12*B3	$1,296	$2,916	$3,888
$B13_{Mid}$	Reduced help desk tickets	B8*B9*B10Mid*B11*B12*B3	$2,592	$6,804	$9,072
$B13_{High}$		B8*B9*B10High*B11*B12*B3	$5,184	$9,720	$12,960
Bt_{Low}		B6Low+B13Low	$13,996	$21,966	$29,288
Bt_{Mid}	Improved ITOps efficiency	B6Mid+B13Mid	$18,467	$30,617	$40,822
Bt_{High}		B6High+B13High	$24,234	$38,295	$51,060
	Three-year projected total: $65,250–$113,589		**Three-year projected present value: $52,882–$92,042**		

Reduced Risk Of A Security Breach

- **Evidence and data.** Interviewees discussed how Copilot+ PCs' hardware-level protections, such as granular IT controls, hardware-backed Secured-core PC protections, and data and privacy safeguards, bolstered security and lowered exposure to data leaks and external attacks. They reported that these device-level defenses contributed to reductions in breach exposure risk, helping to prevent unauthorized data sharing, contain malware earlier, and shore up overall enterprise security posture. The senior vice president in healthcare stated, "The known fact is that [Copilot+] PCs are more secure … and that the sensitive information will be stored in the right way."
- The vice president of information security in hospitality said: "Being able to ensure that more of the data that's confidential and sensitive in nature is being processed locally … is a benefit. … Having AI capabilities embedded within the endpoint … can help really enhance our security."
- The IT manager in municipal government said, "We were pleased with having the additional security compliance with these devices."
- Several interviewees discussed plans to introduce more local AI apps to leverage the dedicated NPUs for on-device threat inference and real-time suspicious processes isolation.

Modeling and assumptions. Based on the interviews and additional Forrester research, Forrester assumes the following about the composite organization:

- The composite organization faces $2.79 million in annual breach costs with a 62% probability of one or more incidents.[3]
- Copilot+ PCs cover 70% of typical breach vectors — including external attacks on organizations and remote environments, internal incidents, and attacks or incidents involving the external ecosystem.
- The reduction in addressable exposure ranges from 5% to 15%.
- Copilot+ PC deployment ramps from 50% of all Windows PCs in Year 1 to 75% in Year 2 and 100% in Year 3, reflecting the organization's refresh schedule.
- Twenty percent of the reduced risk of exposure to breach costs is attributed to Copilot+ PCs — recognizing that dedicated NPU support, on-device threat inference, Pluton security processors, Secured-core PC safeguards, and built-in data-leakage controls enhance the composite organization's existing firewalls, device detection and response tools, secure web gateways, and identity-management stack.

Results. This yields a three-year projected PV ranging from $22,000 (low) to $66,000 (high).

Reduced Risk Of A Security Breach					
Ref.	**Metric**	**Source**	**Year 1**	**Year 2**	**Year 3**
C1	Cumulative cost of breaches for the composite	Forrester research	$2,791,000	$2,791,000	$2,791,000
C2	Likelihood of experiencing one or more breaches for the composite	Forrester research	62%	62%	62%
C3	Percentage of breaches originating from external attacks on organizations and remote environments, internal incidents, and attacks or incidents involving the external ecosystem	Forrester research	100%	100%	100%
C4	Percentage of those attacks addressable with Copilot+ PCs	Interviews	70%	70%	70%
C5	Annual risk exposure addressable with Copilot+ PCs	C1*C2*C3*C4	$1,211,294	$1,211,294	$1,211,294
$C6_{Low}$			5%	5%	5%
$C6_{Mid}$	Reduced breach cost exposure risk from addressable attacks with Copilot+ PCs	Interviews	10%	10%	10%
$C6_{High}$			15%	15%	15%
C7	Portion of Copilot+ PCs deployed	Composite	50%	75%	100%
C8	Attribution to Copilot+ PCs	Interviews	20%	20%	20%
Ct_{Low}		C5*C6Low*C7*C8	$6,056	$9,085	$12,113
Ct_{Mid}	Reduced risk of a security breach	C5*C6Mid*C7*C8	$12,113	$18,169	$24,226
Ct_{High}		C5*C6High*C7*C8	$18,169	$27,254	$36,339
	Three-year projected total: $27,254–$81,762		**Three-year projected present value: $22,115–$66,344**		

Unquantified Benefits

Interviewees mentioned the following additional benefits that their organizations experienced but were not able to quantify:

- **Improved employee experience from high-performance devices.** Interviewees discussed positive feedback from employees regarding Copilot+ PCs and indicated that users felt more empowered and less frustrated when their PCs responded instantly to AI prompts and searches, reducing workarounds and boosting daily engagement. The senior vice president in healthcare said: “Everybody liked the speed. Everybody liked the user experience.” The endpoint management architect in consumer goods added, “We do see a better performance for those users and more user satisfaction … plus a lack of frustration … which drives more creativity.”
- **Improved customer experience from AI-accelerated and enhanced workflows.** The CIO in healthcare reported that using Copilot+ PCs dramatically sharpened AI-driven MRI and coronary scans, surfacing previously undetected arterial plaque. This boost in image fidelity translated into more timely preventive interventions and stronger patient outcomes.
- **Enhanced meeting quality and accessibility.** Several interviewees noted clearer audio/video and improved collaboration. The senior IT engineer in travel said, “We’re having less issues with things like our VPN client … and with Teams — that isn’t happening anymore.” The CIO in healthcare credited the improved meeting quality with enhancing their organization’s brand.
- **Alignment with sustainability goals through power-efficient design.** Some interviewees described how extended battery life and adaptive power management — such as automatic brightness adjustments and background-activity controls — reduced office energy draw and supported environmental initiatives. The senior vice president in healthcare characterized the adoption of Copilot+ PCs as “more of a green initiative for us … it contributes to that [goal].” The endpoint management architect in consumer goods said: “We do see a much lower energy consumption

with those ARM devices. They are more efficient — more power with less energy. That's also a reason why we are focusing on this architecture."

> *"The capability of these devices has been pretty incredible."*
>
> **Vice president of IT, manufacturing**

Flexibility

The value of flexibility is unique to each customer. There are multiple scenarios in which a customer might implement Copilot+ PCs and later realize additional uses and business opportunities, including:

- **Future-readiness with on-device AI capabilities.** The ability to run custom, industry-specific AI models on the NPU for edge-based predictive analytics and low-latency inferencing where cloud access is limited paves the way for on-premise document drafting tools, real-time anomaly detection in manufacturing lines, or offline-first mobile apps that adapt to changing business needs. Interviewees mentioned the ability to limit variable cloud costs and said their organizations had already begun evaluating local AI pilots — such as on-device document assistants and real-time equipment monitors — and planned to expand these apps enterprisewide to take advantage of offline capabilities and faster decision-making. The vice president of information security in hospitality said, "There are future opportunities that come from the enhanced processing with these NPU devices." The endpoint management architect in consumer goods explained: "We're focused on AI, ... having our own genAI models, ... [and] looking into how we can utilize the NPU. ... We believe in the potential ... [and] more and more tools utilizing the NPU."

Flexibility would also be quantified when evaluated as part of a specific project (described in more detail in Total Economic Impact Approach).

Analysis Of Costs

Quantified cost data as applied to the composite

Total Costs							
Ref.	**Cost**	**Initial**	**Year 1**	**Year 2**	**Year 3**	**Total**	**Present Value**
Dtr	Copilot+ PC device costs	$580,800	$580,800	$580,800	$580,800	$2,323,200	$2,025,164
Etr	Planning and provisioning effort	$48,683	$14,605	$4,868	$4,868	$73,025	$69,642
	Total costs (risk-adjusted)	$629,483	$595,405	$585,668	$585,668	$2,396,225	$2,094,806

Copilot+ PC Device Costs

Evidence and data. Interviewees spoke about a variety of Copilot+ PC models and silicon options — including Qualcomm Snapdragon, Intel Core Ultra, and AMD Ryzen — and the ability to select different form factors and prioritize features that best aligned with end-user needs, such as maximum battery life, peak performance, and balanced compute. Reported per-unit prices ranged from $1,000 to $2,000, which was corroborated by publicly available pricing data. Pricing may vary; contact your device representative for details.

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- The composite provisions Copilot+ PCs models aligned to different user needs — prioritizing maximum battery life for mobile roles, peak-performance chips for data and engineering teams, and balanced configurations for general office staff.
- The average cost per device is $1,320.

Risks. The cost of Copilot+ PCs can vary across organizations due to differences in hardware specification needs.

Results. To account for these risks, Forrester adjusted this cost upward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of $2.0 million.

Copilot+ PC Device Costs						
Ref.	**Metric**	**Source**	**Initial**	**Year 1**	**Year 2**	**Year 3**
D1	Copilot+ PCs deployed	Composite	400	400	400	400
D2	Average device cost	Interviews	$1,320	$1,320	$1,320	$1,320
Dt	Copilot+ PC device costs	D1*D2	$528,000	$528,000	$528,000	$528,000
	Risk adjustment	↑10%				
Dtr	Copilot+ PC device costs (risk-adjusted)		$580,800	$580,800	$580,800	$580,800
	Three-year total: $2,323,200			**Three-year present value: $2,025,164**		

Planning And Provisioning Effort

Evidence and data. Interviewees said that planning and deploying Copilot+ PCs followed existing Windows PC refresh and imaging processes — running pilot configurations, integrating security policies, and validating AI-specific settings. They reported only a small incremental effort to evaluate on-device AI considerations such as privacy, security, and performance.

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Four ITOps FTEs spend 50% of their time over two months on planning, configuration, and provisioning efforts for the initial deployment of Copilot+ PCs.
- Over the course of Year 1, the ITOps team spends 15% of its time on planning and provisioning for the next tranche of Copilot+ PCs.
- In Years 2 and 3, the team spends 10% of its time over one month supporting the additional deployments of Copilot+ PCs.
- The average fully burdened annual salary of ITOps personnel is $127,000.

Risks. This cost can vary across organizations due to differences in:

- The scale and complexity of the pilot and rollout, which affects how many device images and configurations an organization must create and test.
- The level of integration with custom applications and security controls, which can drive additional provisioning and validation work.
- The breadth of user profiles and required training, with remote or non-technical staff potentially needing more guidance and support time.

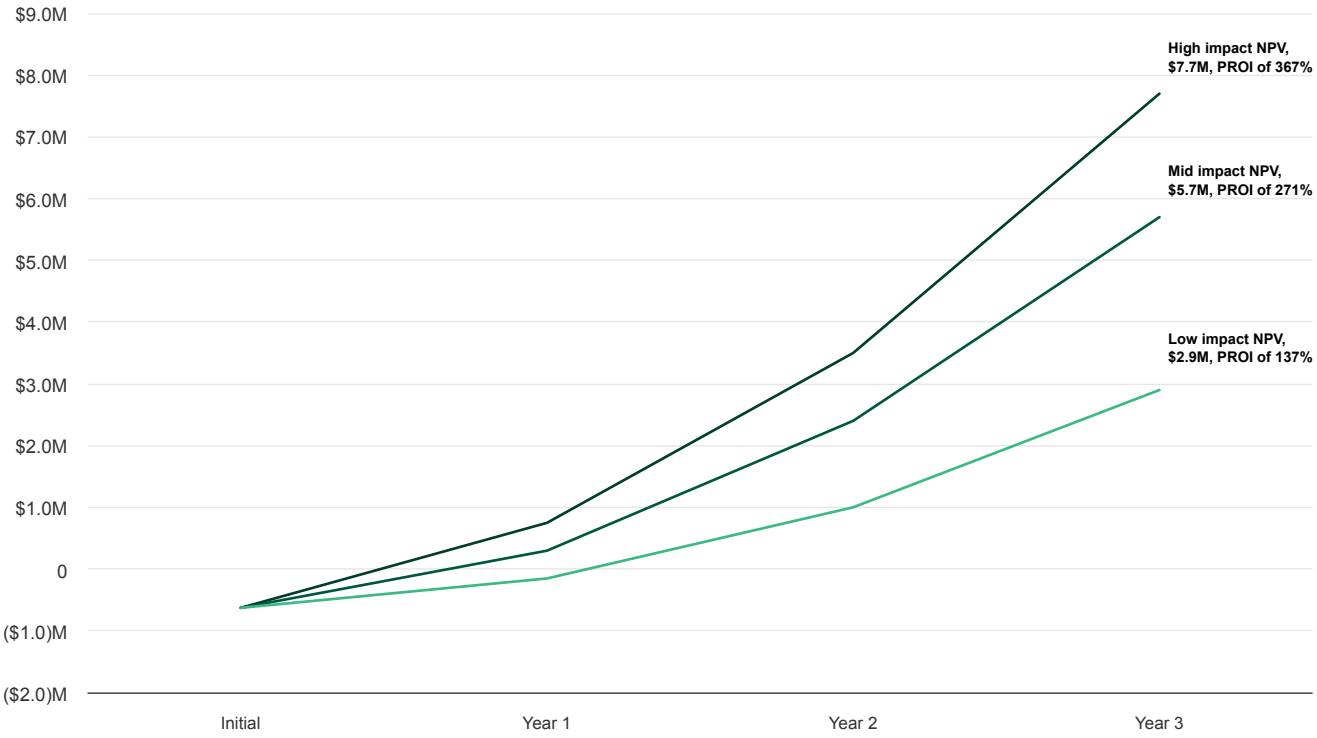
Results. To account for these risks, Forrester adjusted this cost upward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of $70,000.

Planning And Provisioning Effort						
Ref.	**Metric**	**Source**	**Initial**	**Year 1**	**Year 2**	**Year 3**
E1	ITOps FTEs	Composite	4	4	4	4
E2	Duration of planning, configuration, and/or provisioning period (months)	Interviews	2	2	1	1
E3	Percentage of time spent on planning, configuration, and/or provisioning	Composite	50%	15%	10%	10%
E4	Fully burdened annual salary for ITOps personnel	Composite	$127,000	$127,000	$127,000	$127,000
Et	Planning and provisioning effort	E1*E2*E3*E4/12	$42,333	$12,700	$4,233	$4,233
	Risk adjustment	↑15%				
Etr	Planning and provisioning effort (risk-adjusted)		$48,683	$14,605	$4,868	$4,868
	Three-year total: $73,025			**Three-year present value: $69,642**		

Financial Summary

Consolidated Three-Year, Risk-Adjusted Metrics

Three-Year Projected Financial Analysis For The Composite Organization



Cash Flow Analysis (Risk-Adjusted)

	Initial	Year 1	Year 2	Year 3	Total	Present Value
Total costs	($629,483)	($595,405)	($585,668)	($585,668)	($2,396,225)	($2,094,806)
Total benefits (low)	$0	$1,120,052	$1,989,051	$3,077,401	$6,186,504	$4,974,171
Total benefits (mid)	$0	$1,614,580	$3,128,786	$4,949,048	$9,692,414	$7,771,866
Total benefits (high)	$0	$2,110,403	$3,915,549	$6,159,399	$12,185,351	$9,782,188
Net benefits (low)	($629,483)	$524,647	$1,403,382	$2,491,733	$3,790,279	$2,879,365
Net benefits (mid)	($629,483)	$1,019,175	$2,543,118	$4,363,380	$7,296,189	$5,677,060
Net benefits (high)	($629,483)	$1,514,998	$3,329,881	$5,573,730	$9,789,126	$7,687,382
PROI (low)						137%
PROI (mid)						271%
PROI (high)						367%

ⓘ Please Note

The financial results calculated in the Benefits and Costs sections can be used to determine the PROI and projected NPV for the composite organization's investment. Forrester assumes a yearly discount rate of 10% for this analysis.

These risk-adjusted PROI and projected NPV values are determined by applying risk-adjustment factors to the unadjusted results in each Benefit and Cost section.

The initial investment column contains costs incurred at "time 0" or at the beginning of Year 1 that are not discounted. All other cash flows are discounted using the discount rate at the end of the year. PV calculations are calculated for each total cost and benefit estimate. NPV calculations in the summary tables are the sum of the initial investment and the discounted cash flows in each year. Sums and present value calculations of the Total Benefits, Total Costs, and Cash Flow tables may not exactly add up, as some rounding may occur.

New Tech TEI Framework And Methodology

From the information provided in the interviews, Forrester constructed a New Technology: Projected Total Economic Impact™ (New Tech TEI) framework for those organizations considering an investment in Copilot+ PCs.

The objective of the framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision. Forrester took a multistep approach to evaluate the projected impact that Copilot+ PCs can have on an organization.

Due Diligence

Interviewed Microsoft stakeholders and Forrester analysts to gather data relative to Copilot+ PCs.

Early-Implementation Interviews

Interviewed nine decision-makers at organizations using Copilot+ PCs in a pilot or beta stage to obtain data about projected costs, benefits, and risks.

Composite Organization

Designed a composite organization based on characteristics of the interviewees' organizations.

Projected Financial Model Framework

Constructed a projected financial model representative of the interviews using the New Tech TEI methodology and risk-adjusted the financial model based on issues and concerns of the interviewees.

Case Study

Employed four fundamental elements of New Tech TEI in modeling the investment's potential impact: benefits, costs, flexibility, and risks. Given the increasing sophistication of ROI analyses related to IT investments, Forrester's TEI methodology provides a complete picture of the total economic impact of purchase decisions. Please see Appendix A for additional information on the TEI methodology.

Glossary

Total Economic Impact Approach

Projected benefits

Projected benefits represent the projected value the solution delivers to the business. The New Tech TEI methodology places equal weight on the measure of projected benefits and projected costs, allowing for a full examination of the solution's effect on the entire organization.

Projected costs

Projected costs comprise all expenses necessary to deliver the proposed value, or benefits, of the solution. The methodology captures implementation and ongoing costs associated with the solution.

Flexibility

Flexibility represents the strategic value that can be obtained for some future additional investment building on top of the initial investment already made. The ability to capture that benefit has a PV that can be estimated.

Risks

Risks measure the uncertainty of benefit and cost estimates given: 1) the likelihood that estimates will meet original projections and 2) the likelihood that estimates will be tracked over time. TEI risk factors are based on "triangular distribution."

Financial Terminology

Present value (PV)

The present or current value of (discounted) cost and benefit estimates given at an interest rate (the discount rate). The PV of costs and benefits feed into the total NPV of cash flows.

Projected net present value (PNPV)

The projected present or current value of (discounted) future net cash flows given an interest rate (the discount rate). A positive project NPV normally indicates that the investment should be made unless other projects have higher NPVs.

Projected return on investment (PROI)

A project's expected return in percentage terms. ROI is calculated by dividing net benefits (benefits less costs) by costs.

Discount rate

The interest rate used in cash flow analysis to take into account the time value of money. Organizations typically use discount rates between 8% and 16%.

Appendixes

APPENDIX A

NEW TECHNOLOGY: Projected Total Economic Impact

New Technology: Projected Total Economic Impact (New Tech TEI) is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The New Tech TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

APPENDIX B

Endnotes

[1] Some of the customers interviewed for this study were using versions of Copilot+ PC features available only through a Windows Insider Preview Build that is not yet generally available to customers. Copilot+ PC experiences vary by device and market and may require updates continuing to roll out through 2025; timing varies. See aka.ms/copilotpluspcspro.

[2] Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

[3] The annual breach costs are based on a regression analysis of the reported total cumulative costs of all breaches experienced by security decision-makers' organizations in the past 12 months. The composite organization's revenue is used as the input to the regression formula. Source: Forrester's Security Survey, 2024, "Using your best estimate, what was the total cumulative cost of all breaches experienced by your organization in the past 12 months?" Base: 1,660 global security decision-makers who have experienced a breach in the past 12 months.

The percentage likelihood of a breach is based on a regression analysis of the likelihood of experiencing one or more breaches using the frequency that organizations experienced breaches in the past 12 months as reported by security decision-makers. The composite organization's revenue is used as the input to the regression formula. Source: Forrester's Security Survey, 2024, "How many times do you estimate that your organization's sensitive data was potentially compromised or breached in the past 12 months?" Base: 2,769 global security decision-makers.

Disclosures

Readers should be aware of the following:

This study is commissioned by Microsoft and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.

Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the study to determine the appropriateness of an investment in Copilot+ PCs. For any interactive functionality, the intent is for the questions to solicit inputs specific to a prospect's business. Forrester believes that this analysis is representative of what companies may achieve with Copilot+ PCs based on the inputs provided and any assumptions made. Forrester does not endorse Microsoft or its offerings. Although great care has been taken to ensure the accuracy and completeness of this model, Microsoft and Forrester Research are unable to accept any legal responsibility for any actions taken on the basis of the information contained herein. The interactive tool is provided 'AS IS,' and Forrester and Microsoft make no warranties of any kind.

Microsoft reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.

Microsoft provided the customer names for the interviews but did not participate in the interviews.

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