IDC FutureScape

The agentic business future

Driving innovation, resilience, and sovereignty in EMEA



An IDC eBook

IDC EMEA's tech predictions for 2026 and beyond



Table of contents

Introduction	3
Setting the predictions in context	4
IDC EMEA's predictions for 2026 and beyond	15
Summary of predictions	35
Further resources	37

About this eBook

This eBook is based on the EMEA FutureScape webinar presentation presented on 3 December 2025.

This eBook covers 6 impactful predictions put together by IDC's regional analyst team and based on market insights, conversations with technology leaders such as CIOs, CISOs and from IDC's Industry advisory boards as well as the broader tech ecosystem community, to give you IDC's perspective as we continue our journey in the Age of AI.

Last year, we talked about being at an inflection point with AI going mainstream. 2025 has been the year of agents everywhere, so in the first part of the book, we will look back at these predictions and see if we were correct or not.

Prior to the actual predictions, case studies and industry validation, we will discuss the context in which the predictions are based.



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Setting this year’s predictions in context...

One year ago...

All eyes on (Gen) AI

EMEA AI Spending has reached 50$ Billion in 2024, and is expected to grow by 35% in 2025

The PoC Jail

Only 13% of GenAI-focused Proofs-Of-Concept made it into production in the last 12 months

Future in Green

91% of EMEA businesses are currently investing in AI for sustainability initiatives

Workforce Redefinition

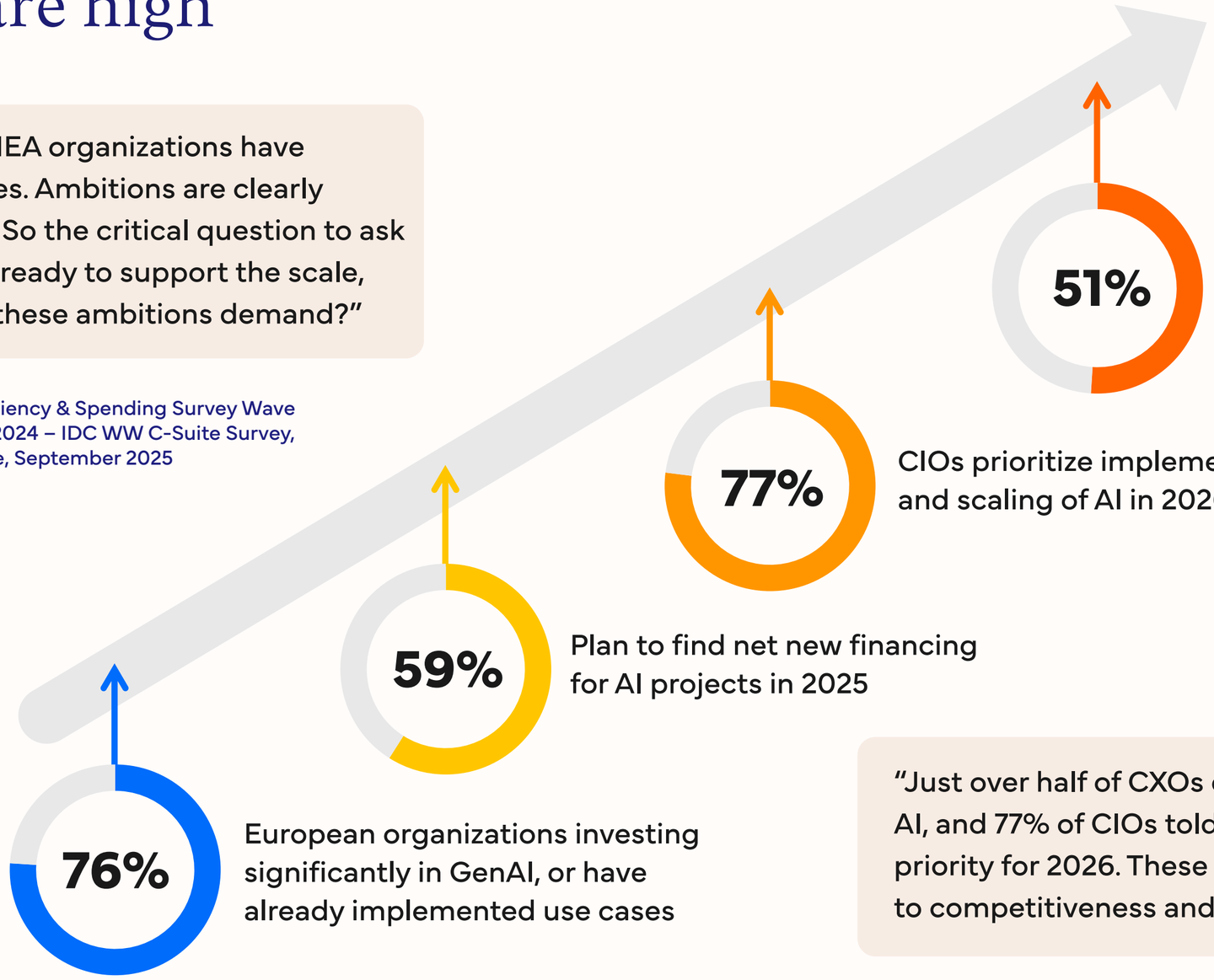
2 out of 3 EMEA employees expect to see their jobs impacted by automation by end of 2025



Ambitions are high

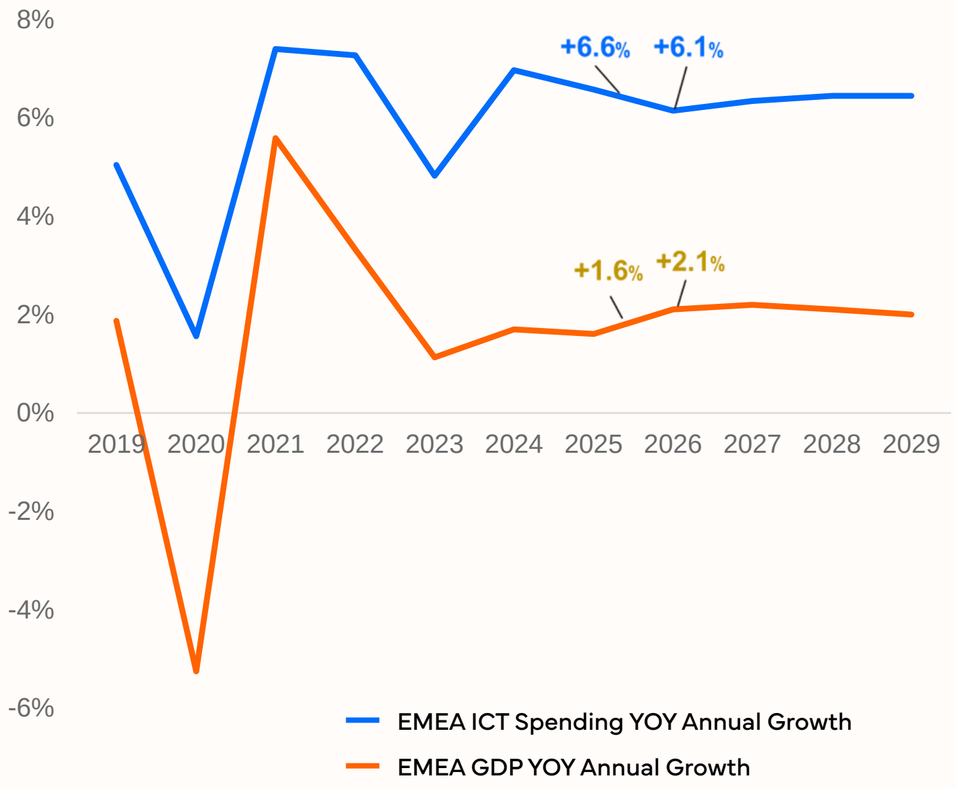
"Fewer than 10% of EMEA organizations have advanced AI capabilities. Ambitions are clearly outpacing the runway. So the critical question to ask is: Is your organization ready to support the scale, speed, and autonomy these ambitions demand?"

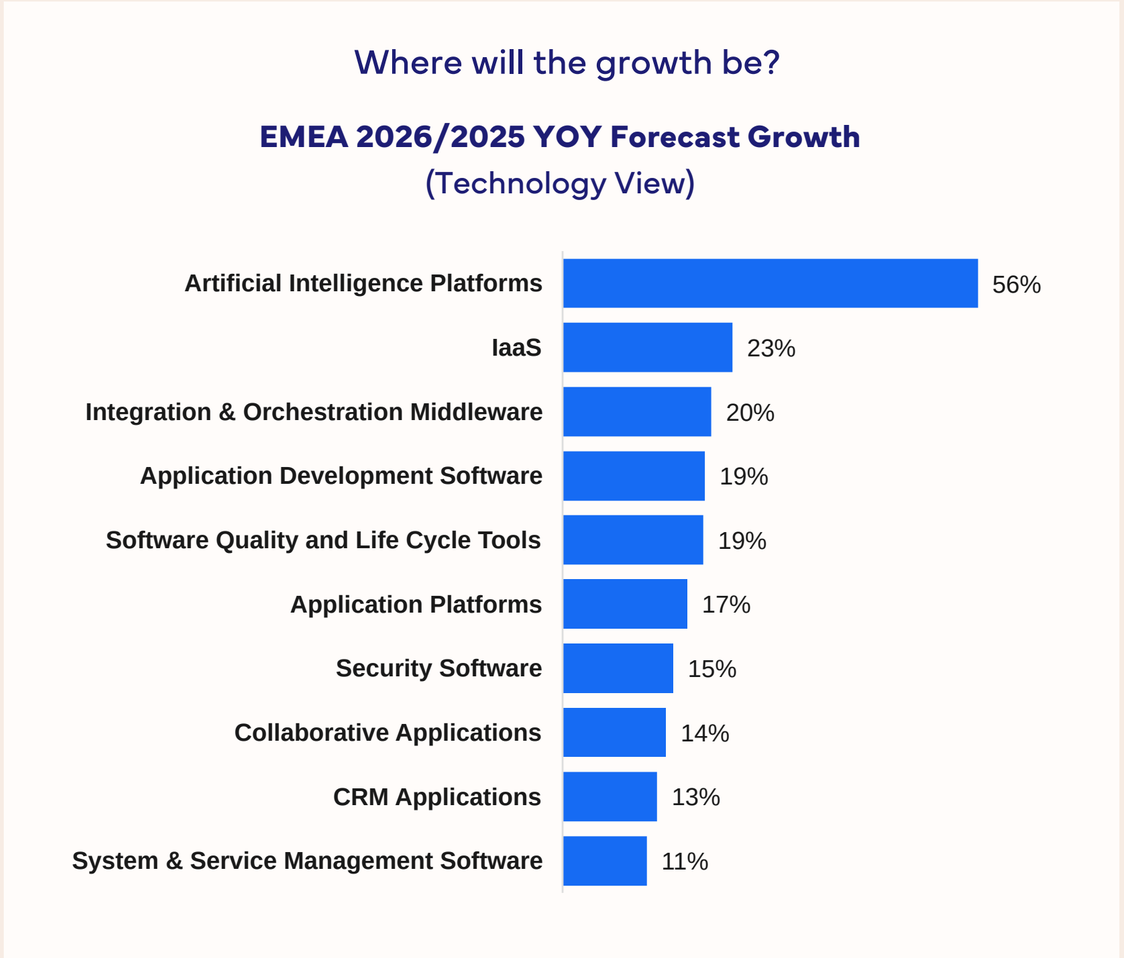
Sources: IDC Future Enterprise Resiliency & Spending Survey Wave 2, March 2025; Wave 10, December 2024 – IDC WW C-Suite Survey, October 2024 – IDC CIO Quick Pulse, September 2025



"Just over half of CXOs expect revenue growth from AI, and 77% of CIOs told us scaling AI is their top priority for 2026. These ambitions are tied directly to competitiveness and shareholder value."

4X faster: ICT vs GDP – where growth happens

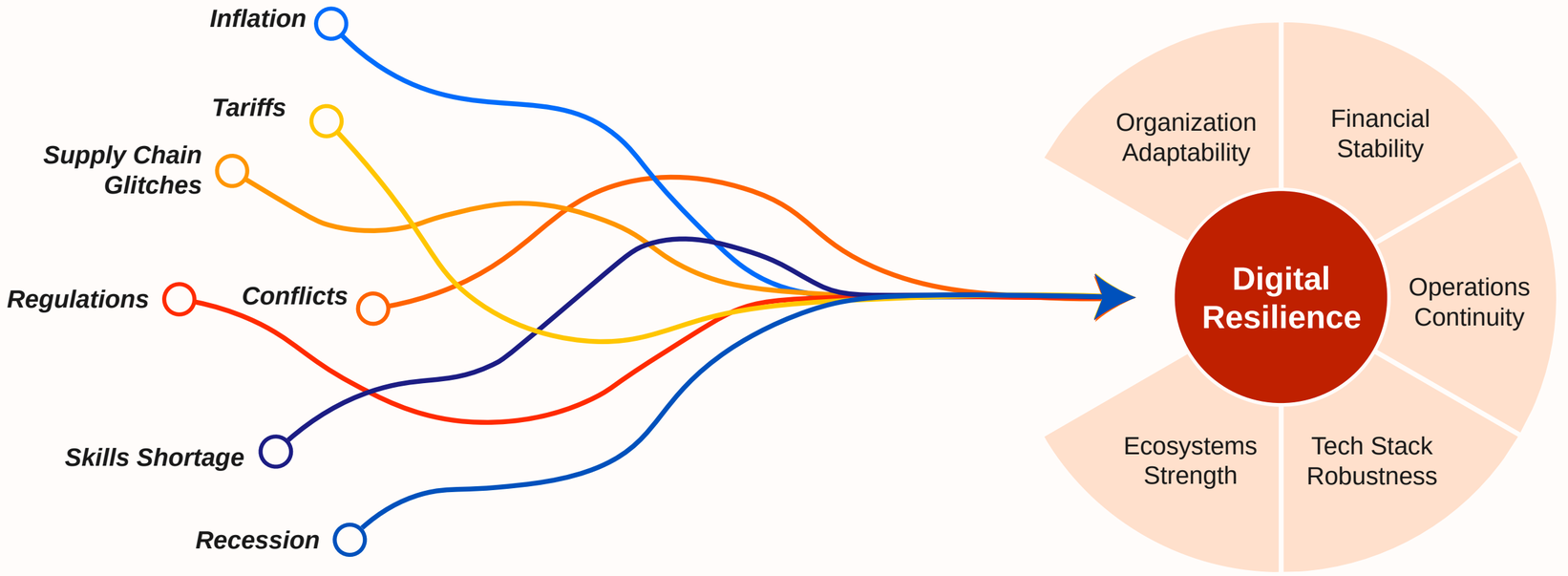




Source: IDC Worldwide BlackBook Live Edition, November 2025 – Note: ICT Spending includes Hardware, Software, Telco and IT Services Spending

EMEA CEOs confronting the strategic tension between resilience and...

77% of EMEA organizations indicated "keeping their company secure and resilient" as their top business priority for 2025



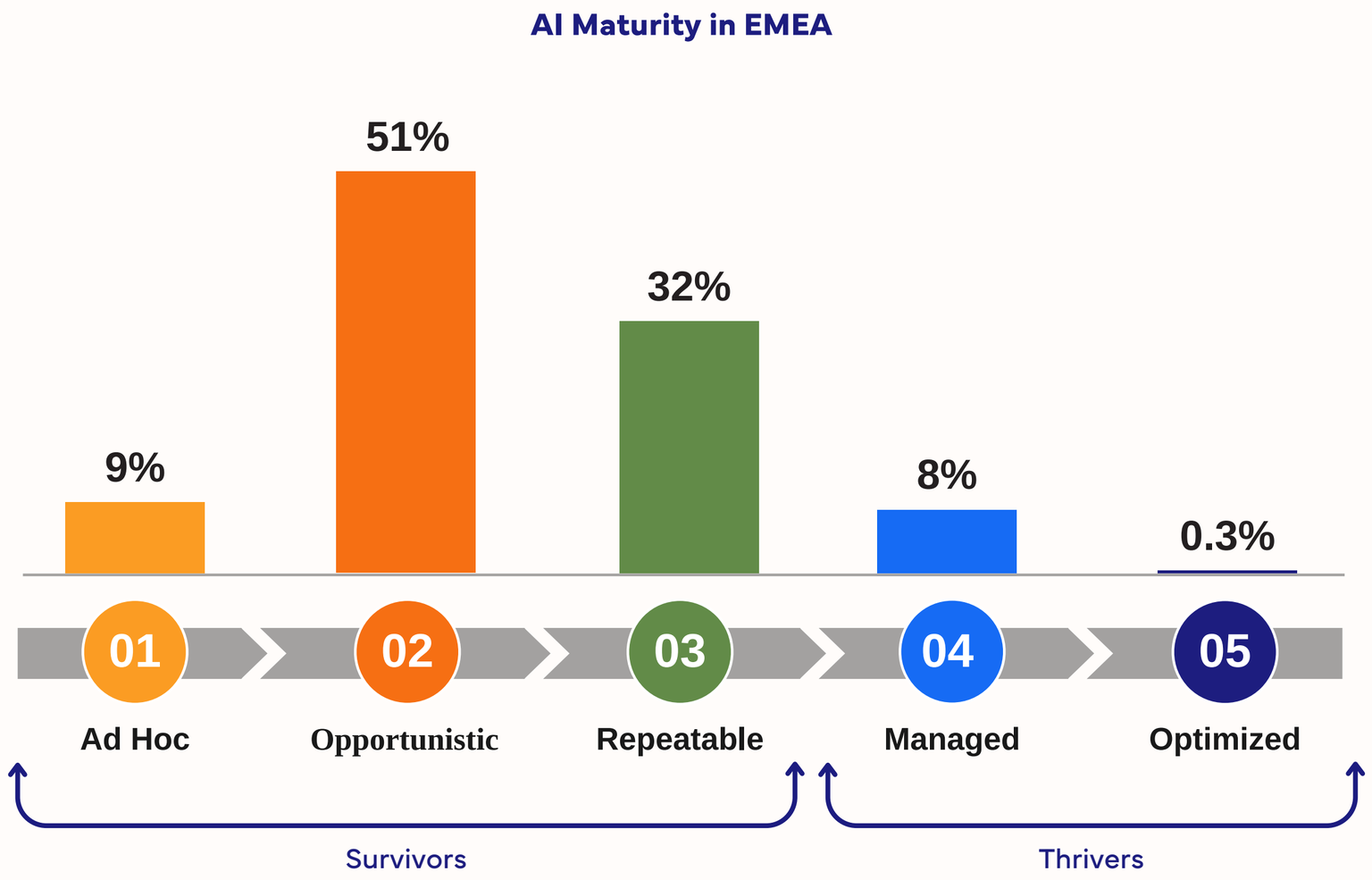
In 2025, 77% of EMEA organizations identified resilience - keeping their company secure and stable - as their top business priority as they navigating multiple disruptions: inflation, tariffs, supply chain glitches, regulatory changes, conflicts, skills shortages, and even recession risks.

To address this, resilience is no longer just about risk management - it's digital resilience. That means building capabilities across 5 dimensions: organizational adaptability, financial stability, operations continuity, tech stack robustness, and ecosystem strength.

The key takeaway: resilience is becoming a competitive differentiator. Companies that invest in these areas will not only survive uncertainty but also position themselves for growth

Source: IDC Enterprise Communication & Collaboration Survey, 2025

...Innovation

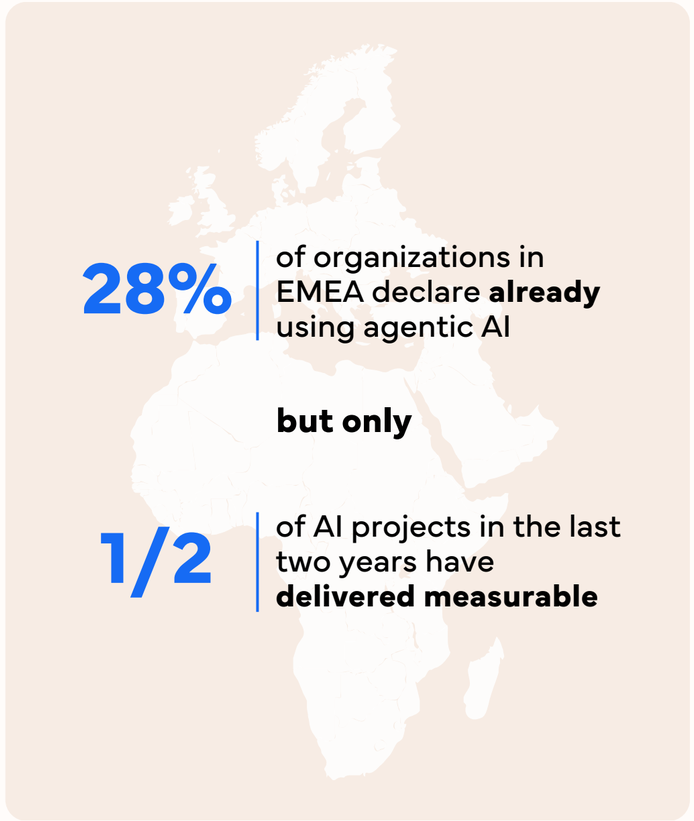


This graphic shows the current state of AI maturity in EMEA. Over half of organizations -51% - are still in the 'Opportunistic' stage, where AI is applied in isolated projects without a clear enterprise strategy. Another 32% have reached the 'Repeatable' stage, with some consistency but still limited scalability. Only a small fraction - 8% - are at 'Managed,' and less than 1% have achieved full optimization.

Key takeaway: Most companies are still in survival mode, and very few are leveraging AI as a strategic driver for innovation and growth

Source: IDC MaturityScape Benchmark: AI-Fueled Organization Worldwide, March 2025, IDC #US53271725

Lots of experimentation and early rollouts… But progress is not easy, organizations in EMEA are struggling



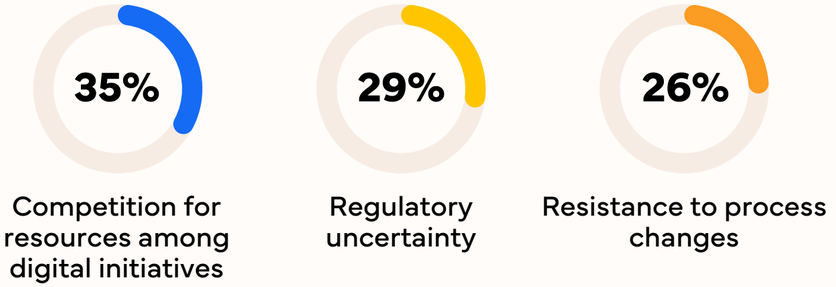
28% of organizations in EMEA declare **already** using agentic AI

but only

1/2 of AI projects in the last two years have **delivered measurable**

Top challenges preventing full AI potential

(% of respondents)



While 28% of organizations report using agentic AI, only half of AI projects in the last two years have delivered measurable business outcomes.

The complexity of delivering real value is starting to sink in. Beyond early experimentation and productivity-focused rollouts, companies are now facing tough challenges: security concerns, sovereign AI requirements, and massive data readiness issues.

Meanwhile, vendors are pivoting hard toward AI Agents, presenting them as the silver bullet- but the truth is, success will require more than technology. It’s about governance, data, and clear business alignment.

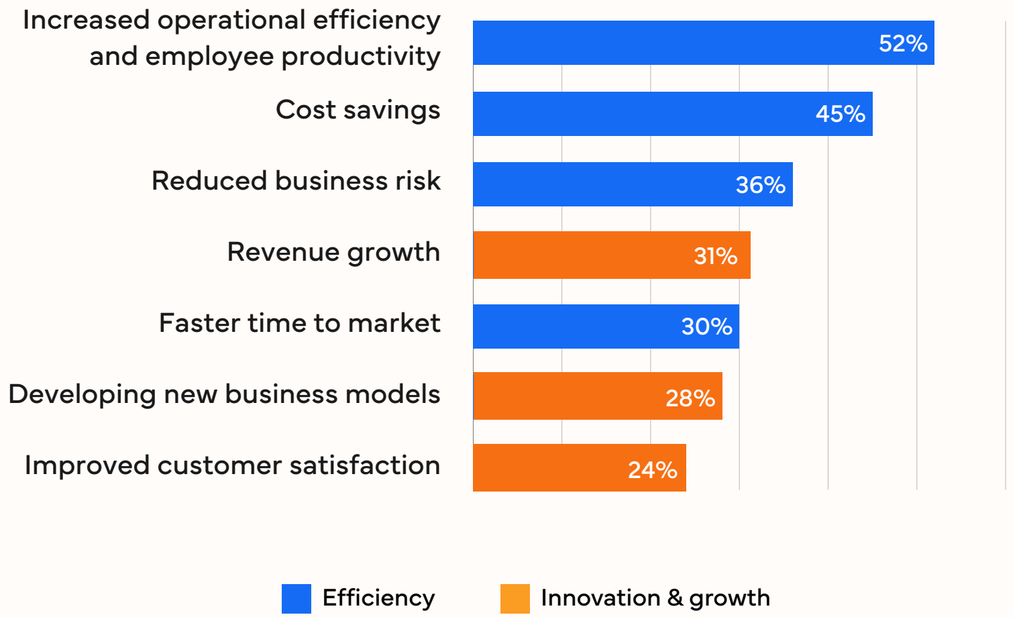
Agents are orchestrators that combine intelligence, context and execution to drive value. In practice AI Agents really are hybrids of AI technology and other complementary technologies.

Source: IDC Global AI Technology Trends Survey, June 2025 – IDC Future Enterprise Resiliency & Spending Survey Wave 7, September 2025

AI focus still high on efficiency, with rising expectations for innovation and growth

The C-suite perspective: focus on efficiency

What are the most important business outcomes the executive teams are looking to achieve with Agentic AI initiatives in the next 18 months?



CEOs' expectations

50% of CEOs believe AI will offer their organization a chance to **reinvent their business model** over the next **3-5 years**



Source: IDC's Worldwide C-Suite Tech Agenda Survey, September 2025 – IDC's Worldwide CEO Survey, February 2025

“

The message is clear: efficiency may dominate today, but the real competitive advantage will come from using AI to drive growth and innovation.”

Case study

Sanofi is a great case of how manufacturers are using GenAI to modernize their operations.

They have integrated GenAI into their Manufacturing Execution Systems and moved from paper-based batch records to fully digital ones across multiple sites. That means no more manual processing and routine quality tasks are now automated.

The result? Faster batch reviews, fewer production deviations, and teams spending more time on high-value work—boosting productivity across locations.

What's interesting is how their journey evolved. They started with efficiency gains, but now they are using digital and AI systems for advanced capabilities like predictive analytics and compliance management. And as these systems become the norm, they are unlocking even more benefits—stronger quality controls, optimized supply chains. Sanofi's experience shows that starting with efficiency can open the door to scalable innovation across the organization.



Beyond the short-term buzz: Rethinking AI value



"

We often overestimate short-term gains but underestimate long-term effects.
This is especially true with AI, which profoundly transforms processes and operating models.

Jens Moberg

CEO and Founder at the Leadership Institute and former chairman at Grundfos

Source: IDC's CEO Interviews Series, 2025

IDC’s EMEA predictions for 2026 and beyond

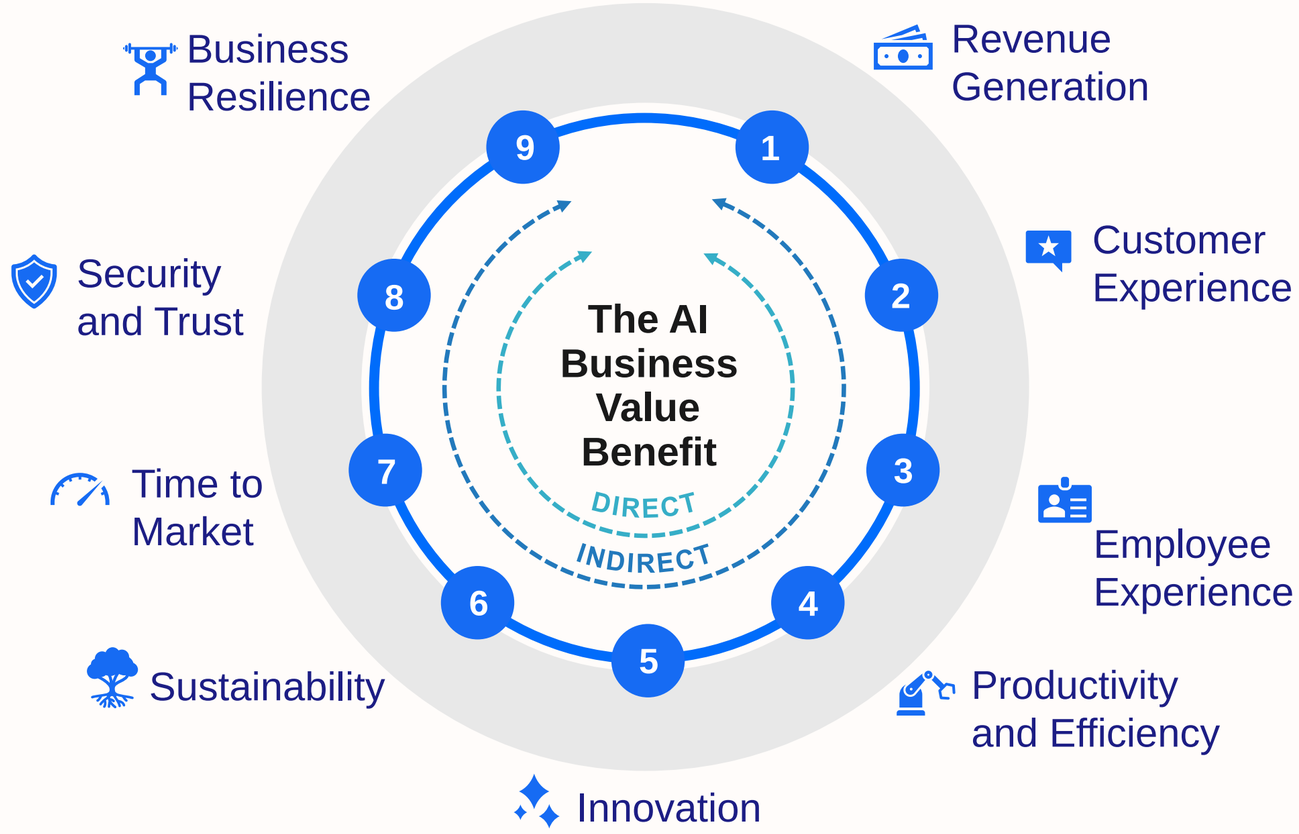


Prediction 1

By 2026, 70% of EMEA1000 CEOs will require clear proof of value before approving new AI investments, prioritizing use cases that deliver impact beyond efficiency, driving growth and strengthening business resilience.

CEOs' tension between Innovation and resilience

Applying the IDC AI business value benefit framework



When we talk about proof of value, it's important to recognize that this goes far beyond the traditional ROI metrics of the past. Today, value encompasses a broader set of outcomes: yes, revenue generation and efficiency remain critical, but so do factors like customer experience, product innovation, and sustainability.

We're looking at a mix of tangible benefits—those that can be directly expressed in financial terms—and intangible ones, such as improved employee experience and satisfaction, which must be translated into measurable business impact.

Source: From AI Return on Investment to Business Value: A Practical ROI and Business Value Calculation Framework for IT Leaders, March 2025, IDC #EUR153267225



Prediction 2

By 2026, 30% of large organizations will evolve hybrid clouds into integrated digital business stacks with federated data fabrics to realize business value, doubling AI production success through smooth data access and unified governance.

AI and data-ready architecture mandates

Modern, data-centric approach to architecture

A digital business stack is an integrated architecture to enable agile digital operations and realize AI-focused business value.

It is built with a data-centric approach based on a federated data fabric principle. This approach helps to keep data decentralized for speedy access whilst making sure the governance policies and enforcements are consistently applied. This evolution is essential to balance both resilience and data-driven innovation.

It delivers results:



36% Already Have AI-ready Applications in Production



80% Report Improvements in Operational Efficiency

7x

7X Faster Time to Market

Source: IDC's CEO Interviews Series, 2025 - IDC's CIO AI Quick Poll, June 2025 - IDC's Digital Executive Sentiment Survey, December 2024

> "Everyone is eager to talk about innovation and the next big thing, but if you don't have the right infrastructure and the right data, nothing works."
>
> CEO, EMEA NGO

Case study

ING Bank's AI strategy is driven by a pragmatic, value-focused approach that prioritizes tangible results and rigorous risk management.

This strategy is built on a robust hybrid multi-cloud data infrastructure. Its architecture is based on 4 principles:

1. Integrated hybrid multicloud architecture to power AI workloads
2. Connected data flows for quality and compliance
3. Data mesh to decentralize data for self-service and speed to market
4. Standardised governance for consistency

A perfect example of integrated digital business stack with a federated data fabric approach, ING’s strategy has increased the agility of data teams, enabling them to deliver value faster across the organization.





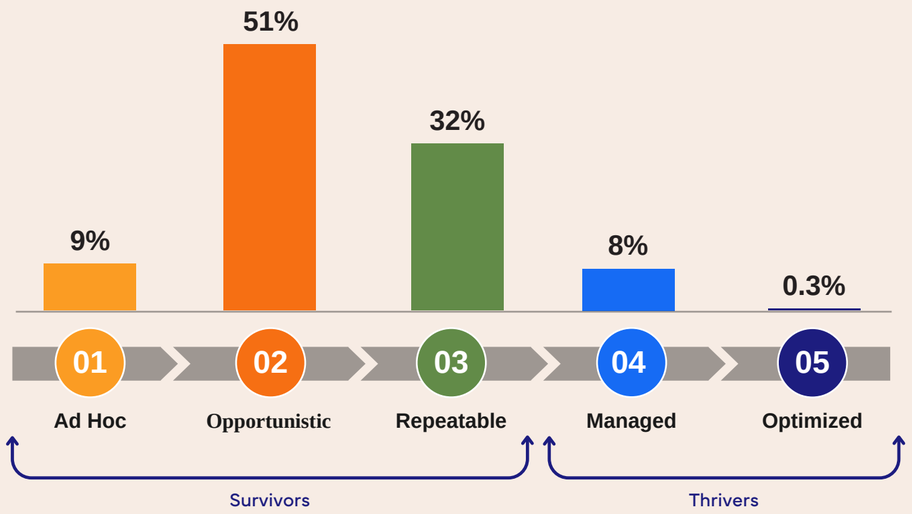
Prediction 3

By 2027, 60% of large EMEA organizations will integrate agentic AI into their observability platforms to automate the enforcement of security and compliance policies, resulting in a reduction of risk policy violations by 50%.

Agentic AI drives governance

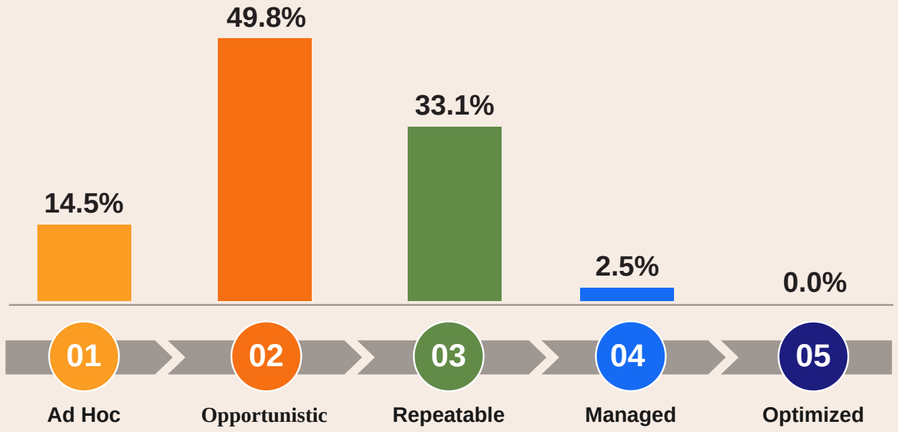
Revisiting AI maturity.....

AI maturity in EMEA

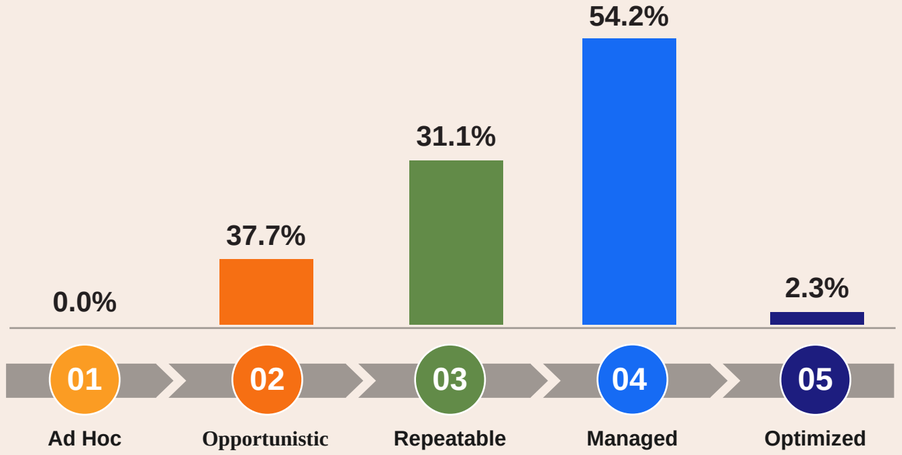


"We can see that the maturity of Thrivers in AI governance is completely different to that of Survivors. What does this tell us? That those companies that are good at AI are also really good at governance. And you can't be good at AI without also being good at governance."

Governance maturity for survivors



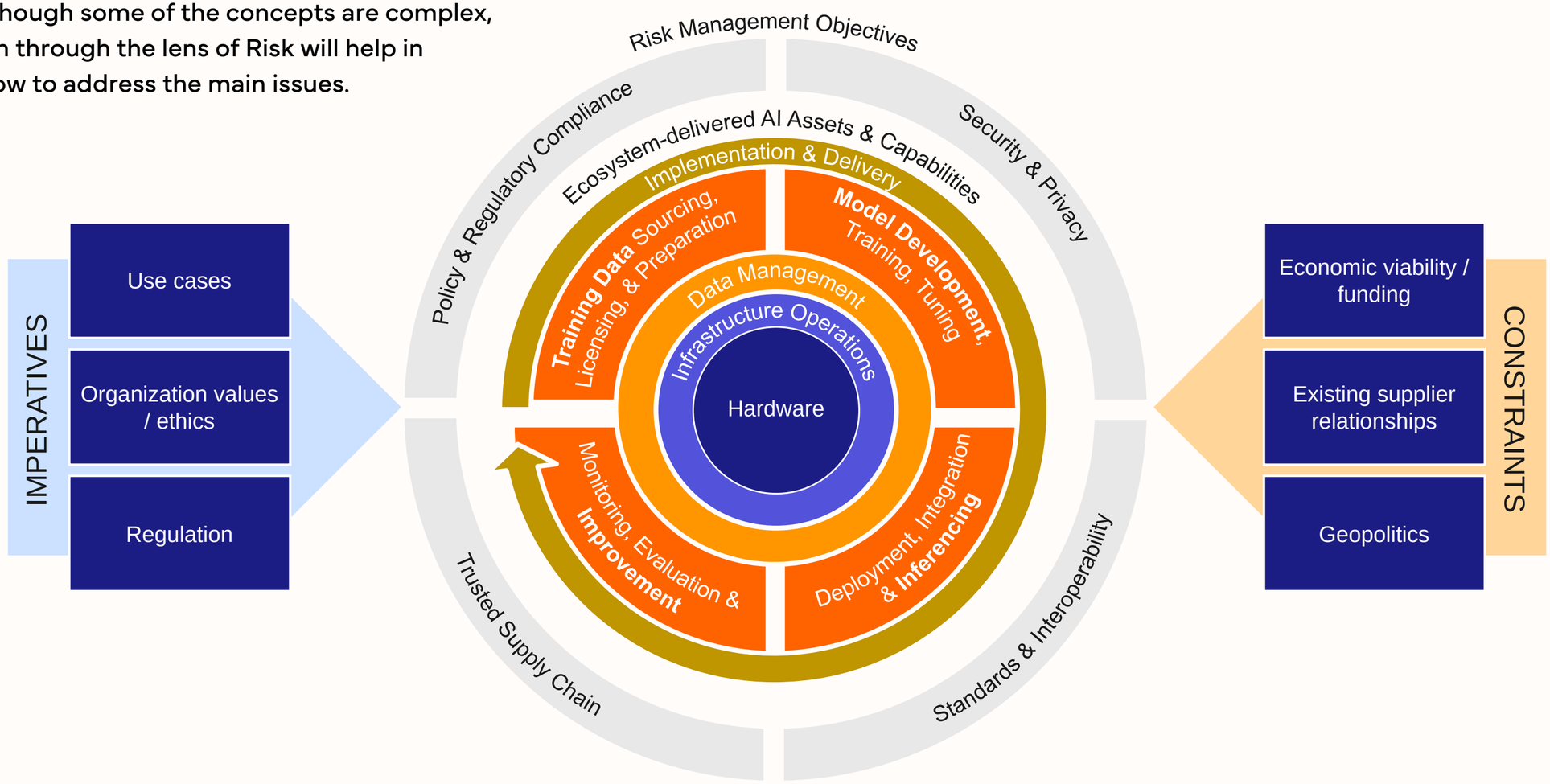
Governance maturity for thrivers



Source: IDC MaturityScape Benchmark: AI-Fueled Organization Worldwide, March 2025, IDC #US53271725

IDC's Sovereign AI framework

Sovereignty is just another source of risk. Perhaps these risks are, these days, more likely to materialize than before. And although some of the concepts are complex, looking at them through the lens of Risk will help in determining how to address the main issues.



Source: IDC's EMEA AI Research, 2025

Case study

Abu Dhabi has set an ambitious goal - to become the world's first fully AI-native government by 2027.

It's a bold move and a clear example of digital sovereignty in action. They intend to shift all government operations to a sovereign cloud, which will give them complete control over data, infrastructure, and AI systems.

This strategy does not stop at technology - it includes major investments in local talent as well, with major programs to upskill citizens in AI applications.

Every government service is being redesigned to use AI, supported by strong digital regulations and a clear goal to automate all processes.

If these ambitions materialize, Abu Dhabi could offer a model for how governance and innovation reinforce each other, shaping a new standard for digital sovereignty.



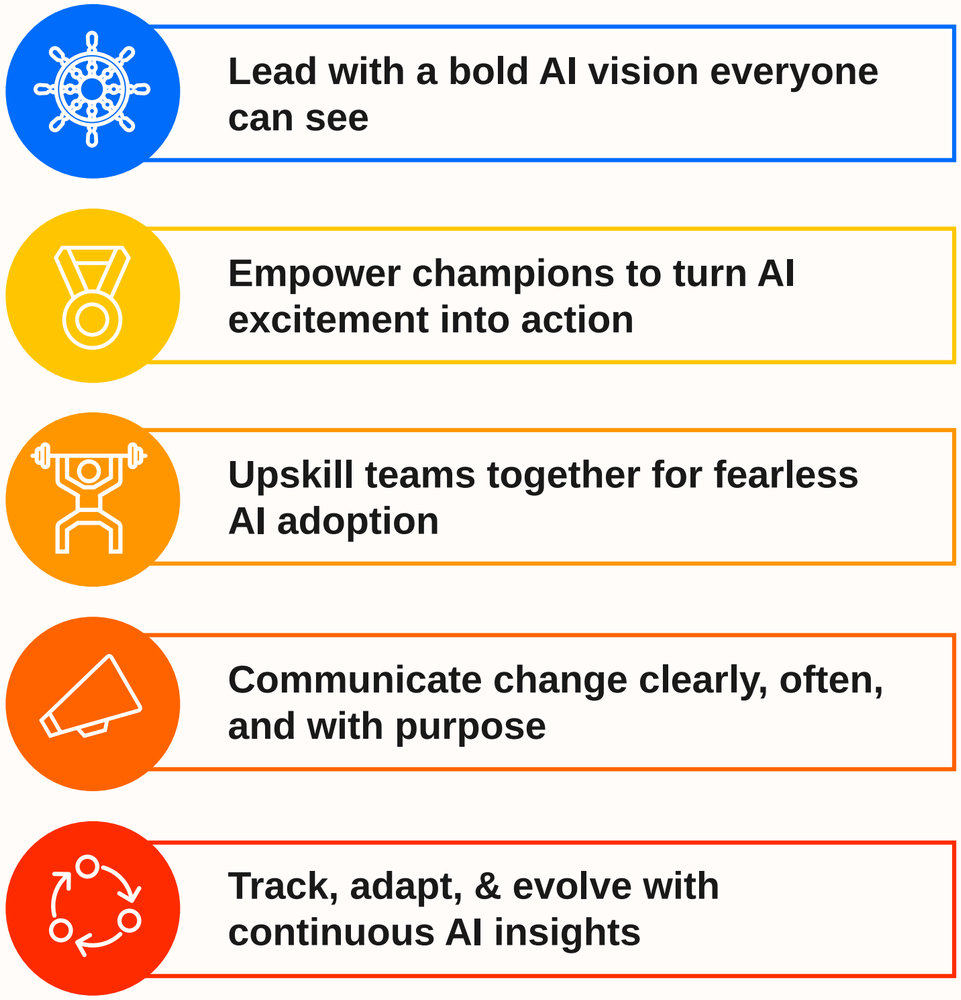


Prediction 4

Over the next two years, 60% of EMEA organizations will only partner with local sovereign cloud providers, in order to fully own and control their AI models.

Sovereignty: risk mitigation or competitive advantage?

Five steps for successful AI change management



AI transformation is no longer a technology project—it's a people project. The organizations that win will be those that embed AI into their culture, not just their systems. This means aligning technology with human potential. Think of AI as a catalyst for agility, creativity, and resilience. But change is hard, and without a structured approach, even the best AI strategy can stall.

Source: IDC's Research, 2025

AI coaching in action



We reached the **same level of behavior change** with **2 months of AI coaching** as we would in **6 months** with what we normally do.
That's why we signed the contract to **scale AI coaching to 10,000 people**.

Mattias Magnell
Skanska

Strategy, Organization and Leadership Development

Source: Pandatron.ai website



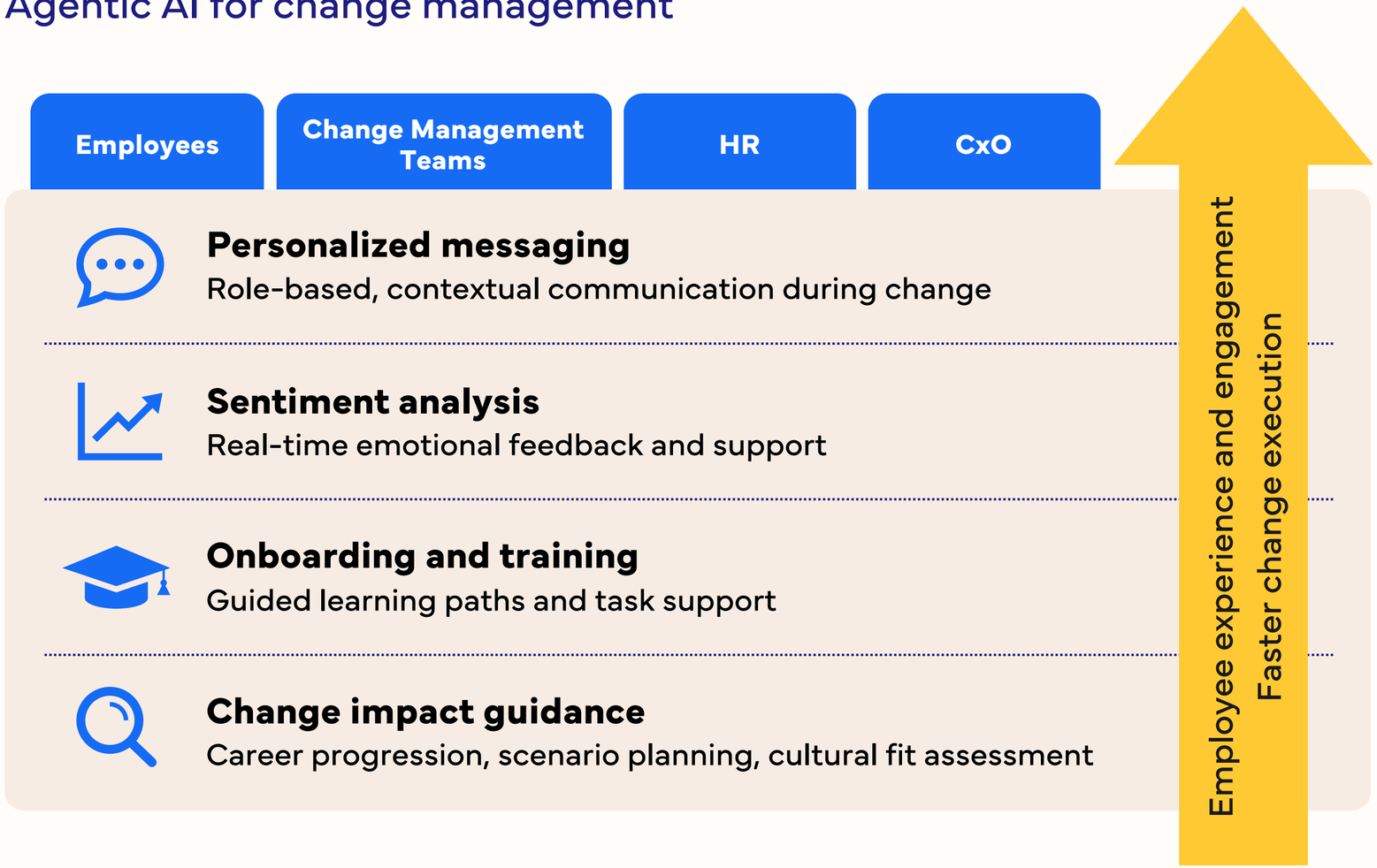
Prediction 5

By 2028, EMEA1000 organizations that implement personalized AI change agents will achieve up to 30% faster change execution and improved employee engagement.

Personalized AI change agents

Why AI agents are the catalyst for transformation

Agentic AI for change management



Source: IDC's Research, 2025

Skipping readiness leads to resistance and slower adoption. That's why AI-powered assistants are now ranked as the #1 investment for improving employee effectiveness. These agents deliver personalized messaging, analyze sentiment, and guide onboarding—all in real time. They don't just tell people what's changing; they help them navigate the change. Think of them as digital coaches embedded in every workflow, reducing friction and accelerating execution. The result? A transformation that feels less like a mandate and more like a movement

Personalized Agents will guide Employees, and augment Change Management Teams, HR and Leaders, leading to improved Employee Experience and faster change execution

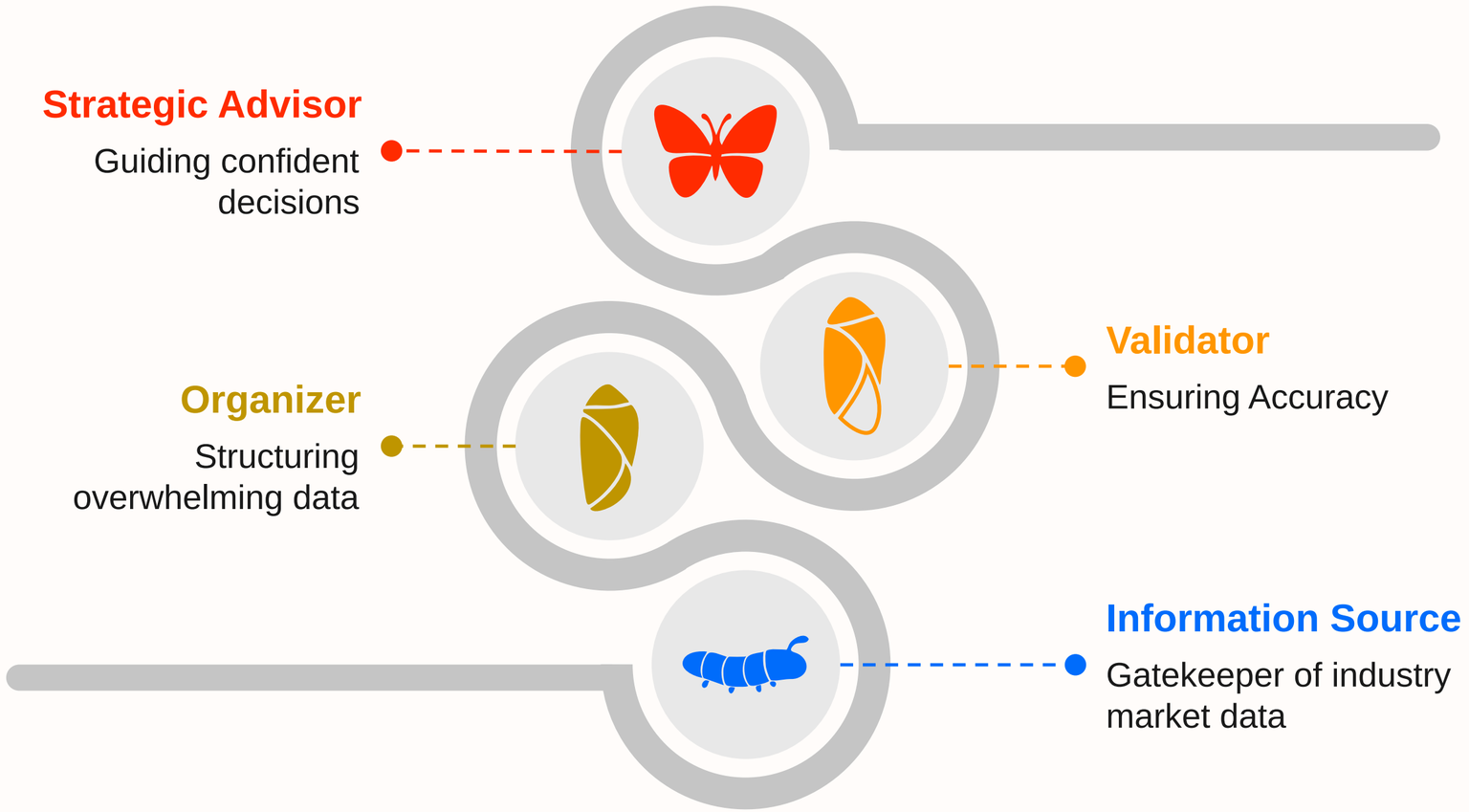
“We educate employees on using new technology without stifling innovation; meeting them in context, providing clear guidance, and ensuring safe, compliant AI adoption.”

Patrick Fueldner

IT Product Manager, Digital Adoption at Nestlé

3 out of 4 EMEA employees expect to see their jobs impacted by AI by end of 2026

The Evolution of the Industry Analyst Profession



AI doesn't replace the analyst business—it makes it stronger. It is a force multiplier, granting speed and breadth. While AI drafts reports or visuals, analysts craft the narrative that matters.

Because in a world overflowing with information and AI-generated noise, organizations don't need another report. They need clarity, guidance, and confidence.

Source: IDC's The Industry Analyst is Dead, Long Live the Industry Analyst – Roberta Bigliani's LinkedIn Post

“

The future workforce will be a blend of humans and AI agents working side-by-side. Employees will need to understand how to collaborate with AI, interpret its outputs, and make decisions in tandem with intelligent systems.

Organizations in EMEA will see mid and senior leadership roles transformed by the widespread adoption of AI and agentic technologies, requiring managers to actively oversee and manage hybrid environments where humans and AI agents collaborate.

Achieving this shift from ad hoc initiatives to optimized, AI-fueled business models makes governance and risk management skills fundamental for operational success.

This future workforce will be measured not merely by AI literacy, but by their ability to link governance directly to evolving business outcomes, ensuring only organizations with robust oversight frameworks unlock the full potential of AI-human collaboration.”

Strategic leadership in AI-driven workforces

Seniority Level	Entry-level		Middle Management		Leadership
Core Focus	Digital onboarding	Personalized Learning Paths	Orchestrating AI-Human Teams		Strategy and Oversight
Key Skills	Prompt acuity, digital literacy	Human Skills	All Previous + Managerial AI Fluency		All previous + AI Data-driven Decision Making
Primary Role Shift	From Execution to Interpretation		Role Redefinition	Change Management	Redefinition of Executive Scope
Knowledge Responsibility	Building Foundational Skills		Knowledge and teamwork continuity		Strategy setting through a hybrid workforce
Talent Development	Accelerated Career Trajectory		Redeploying Talent		Succession Planning

Executive leaders will become "talent architects," guiding succession strategy and helping the organization adapt to AI-enabled ways of working. While AI advancements unlock new possibilities, success hinges on the ability to uphold trust - and that trust starts with the C-suite.

Leaders must define governance frameworks that clarify where agents act independently and where human oversight prevails, reshaping role definitions and decision rights across the enterprise.

Source: The Age of Agency – Why the Future of Work Demands Agentic Approaches, November 2025, IDC #US53901425

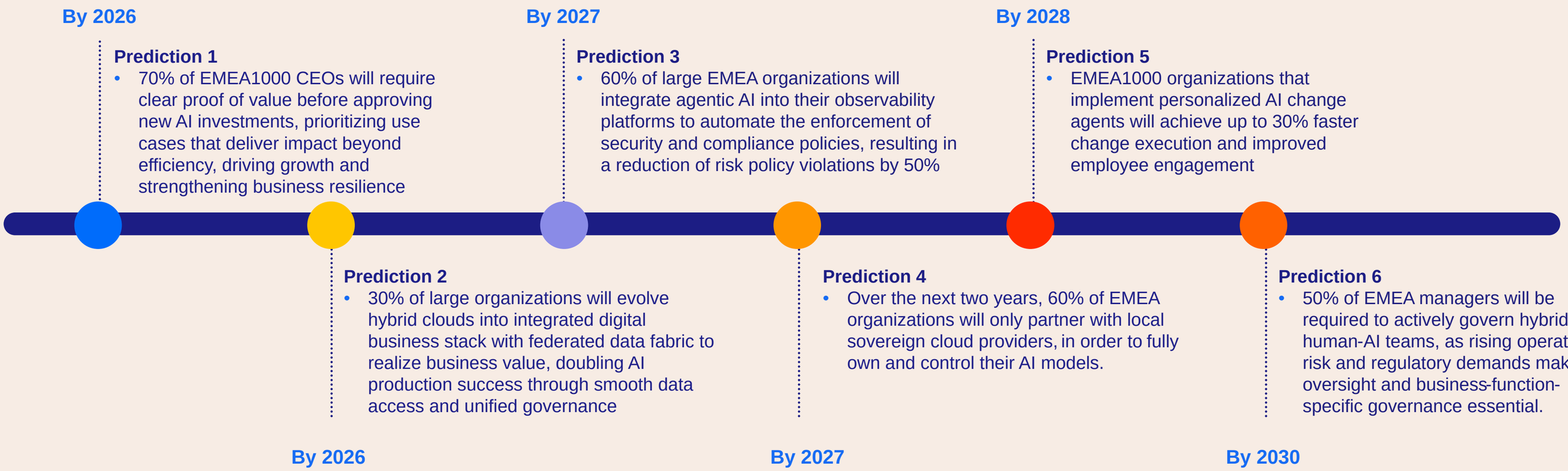


Prediction 6

By 2030, 50% of EMEA managers will be required to actively govern hybrid human-AI teams, as rising operational risk and regulatory demands make oversight and business-function-specific governance essential.

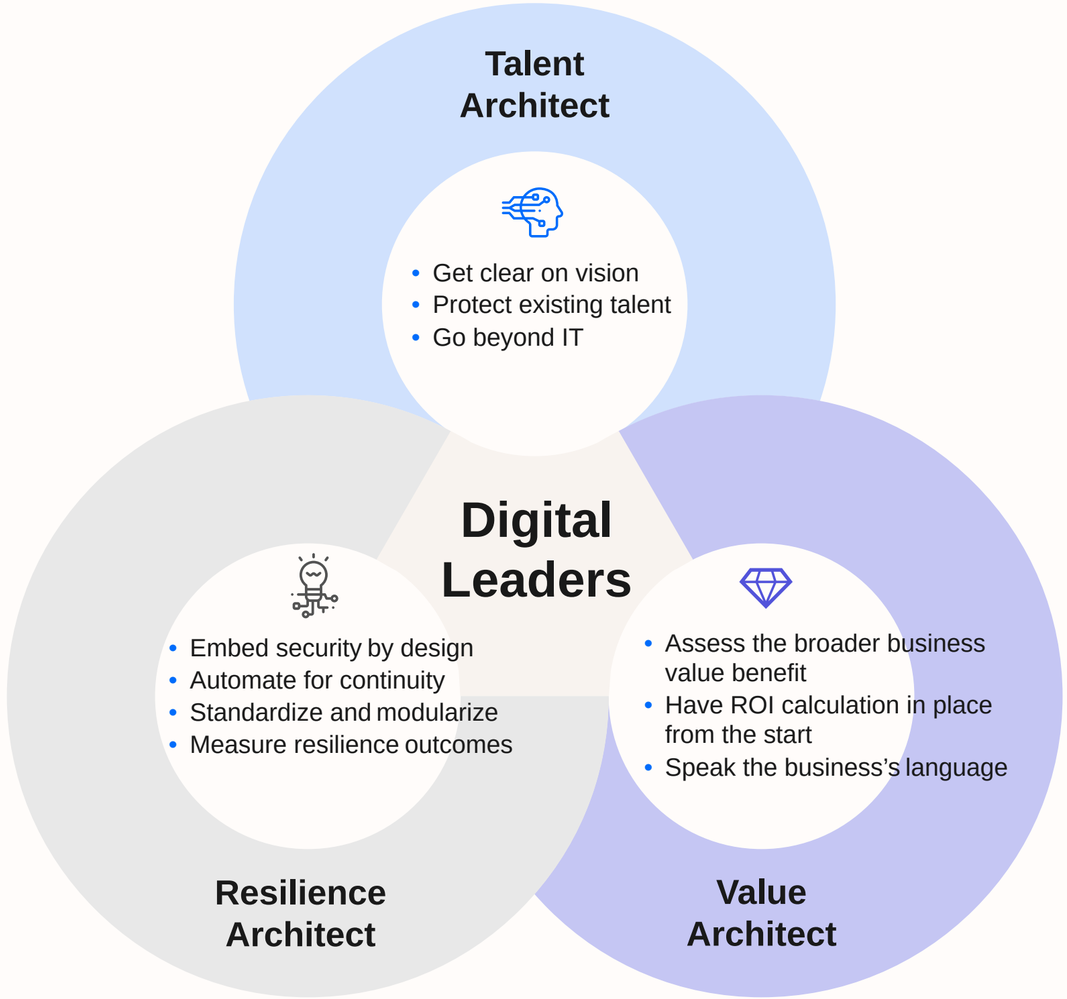
Hybrid human-AI teams management

The IDC EMEA FutureScape2026 predictions



Digital leaders at the intersection of value, talent, and resilience

A balancing act



AI adoption has deepened the reach of digital technologies across all functions. Its widespread implementation marks a collective shift toward AI-driven value creation. At the same time, priorities like technology modernization, governance, and trusted GenAI highlight the need to balance innovation with resilience.

While the emphasis on each role may vary by industry and organizational maturity, CIOs must develop all three roles in parallel. This balancing act is what defines the modern CIO as a true Digital Business Leader.

List of IDC EMEA research contributors

This ebook was a major collaborative effort that would not have been possible without significant input from across IDC's EMEA research team. Thanks to everyone!

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Filippo Vanara
Archana Venkatraman
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Ewa Zborowska

Further resources

AI in EMEA 2025 eBook - download here.

An Industry View of AI, GenAI and AI Agents in EMEA eBook - download here.

Watch the video version of this eBook **The Agentic Business Future: Driving Resilience, Sovereignty, and Innovation in EMEA** - registration link.

If you need more information, or have a question, drop that in here.