Critical External Drivers Shaping Global IT and Business Planning, 2026

September 2025

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2026 Critical External Drivers

IDC's 2026 external drivers incorporate global political, economic, and social factors. These factors will dramatically alter the global business ecosystem for the next 12–24 months and beyond. The drivers were selected based on their relevance and saliency to businesses over the long term. The 10 critical external drivers for 2026 are:

1. **AI Maturity — From Experimentation to Business Value Realization**
2. **Agentic Infusion — Accelerating Efficiency in Decision-Making**
3. **Workforce Augmentation and Skilling — AI-Driven Workplace Transformation**
4. **Regulatory Shifts — Navigating Compliance Challenges in a Shifting Policy Landscape**
5. **Expanding Digital Security Frontiers — Fortification Against Multiplying Threats**
6. **Geopolitical and Trade Risk — Navigating Global Realignment**
7. **Trust and Ethics in IT — Balancing Innovation with Responsibility**
8. **Data Strategies — Data Alignment and Governance**
9. **Technical Debt — The Imperative to Modernize IT**
10. **Customer Expectations — More AI Moderation, Demand for Greater Empathy**

The Interrelationship Between Drivers

These drivers are interrelated and inform one another. This combined relationship helps form the conditions for the current and future business environments.

Data Strategies

Data Alignment and Governance

Technical Debt

The Imperative to Modernize IT

Workforce Augmentation and Skilling

AI-Driven Workplace Transformation

Trust and Ethics in IT

Balancing Innovation with Responsibility

Customer Expectations

More AI Moderation, Demand for Greater Empathy

Agentic Infusion

Accelerating Efficiency in Decision-Making

AI Maturity

From Experimentation to Business Value Realization

Geopolitical and Trade Risk

Navigating Global Realignment

Regulatory Shifts

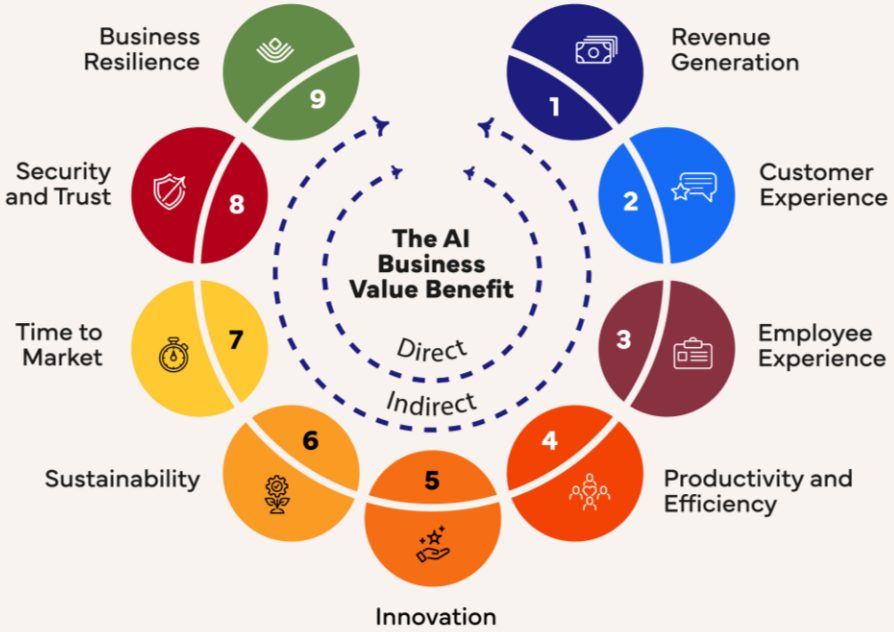
Navigating Compliance Challenges in a Shifting Policy Landscape

Expanding Digital Security Frontiers

Fortification Against Multiplying Threats

AI Maturity

From Experimentation to Business Value Realization



Description

Digital business models are at a turning point. Organizations are moving beyond isolated artificial intelligence (AI) proofs of concept (POCs) toward full-scale deployments, increasingly exploring agentic AI to drive transformation. The goal is to become an AI-fueled enterprise in which AI is a strategic enabler of innovation and growth. Leading companies are orchestrating autonomous agents, embedding humans-in-the-loop, and scaling AI across functions.

Yet most are still in transition. As of early 2025, only 44% of AI POCs had reached production (source: IDC's Future Enterprise Resiliency and Spending [FERS] Survey, Wave 1, 2025), with data integrity and cost-value alignment as major barriers. Many businesses therefore remain in an “ad hoc” stage, although others are approaching an “optimized” state — marked by deliberate, scalable AI strategies. To fully mature, organizations must align AI investments with core business goals, build an AI-ready tech stack, and foster a culture of continuous learning and change management. Crucially, ethical AI practices and data privacy must be embedded from the start. With these foundations, companies can unlock the next level of AI maturity — scaling automation, enhancing agility, and realizing true business value.

Context

With intelligence now a central driver of value creation, we are amid an “intelligence revolution,” a period defined by the rapid integration of AI into the fabric of business. Among these, GenAI and agentic AI stand out as transformative forces. GenAI enables machines to autonomously generate new content, ranging from text and images to code to music, with remarkable fluency and contextual awareness. While early business applications have focused on content creation, code generation, and personalized recommendations, the technology is evolving rapidly. Unlike traditional or even GenAI, agentic AI systems can autonomously pursue goals, adapt to changing conditions, and collaborate with other agents and humans, unlocking new levels of efficiency, innovation, and value creation.

Agentic Infusion

Accelerating Efficiency in Decision-Making

Description

Automation technologies — especially those using agentic AI — are becoming central to enterprise operations. Unlike traditional or generative AI (GenAI), agentic AI introduces autonomous, goal-driven systems that adapt, learn, and optimize within workflows. These intelligent agents act as collaborators, enabling automation of tasks that once required human judgment. This shift marks the rise of intelligent automation in which processes are not only streamlined but also capable of self-improvement.

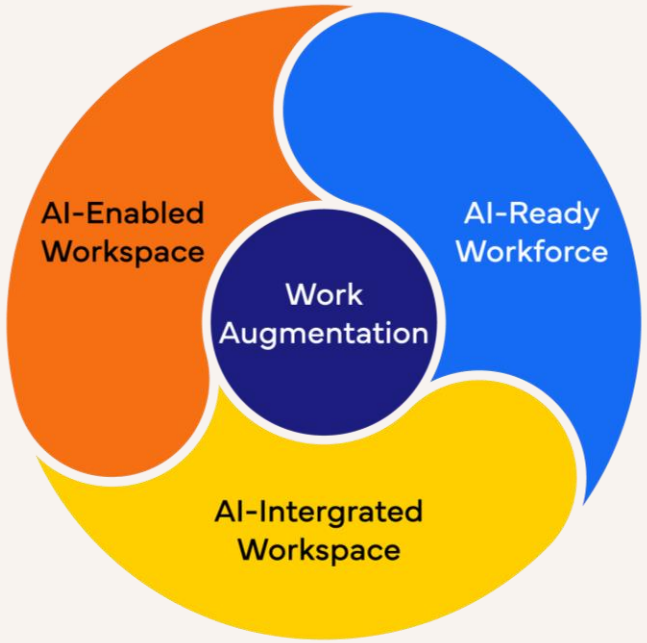
However, realizing this potential requires thoughtful implementation, grounded in strong data governance, quality, and infrastructure. Compliance with regulations like GDPR and CCPA, along with scalable storage solutions such as data lakes, is essential. Further, breaking down silos and fostering a culture of data sharing are critical while safeguarding sensitive information. With these foundations, organizations can embrace hyperautomation: the strategic layering of agentic AI, RPA, and low-code platforms to scale intelligence, reduce costs, and boost agility.

Context

Businesses are reimagining automation as a strategic driver of efficiency and scale. No longer limited to isolated use cases, automation now powers intelligent, interconnected systems across industries — from robotics in healthcare to real-time analytics in logistics. As data becomes a core asset, automation spans IT, process, and value stream domains, laying the foundation for autonomous operations and accelerated innovation. Increasingly, organizations are turning to agentic AI to advance these capabilities — enabling systems that learn, decide, and optimize independently. To unlock this potential, however, companies must first ensure high-quality, well-governed, and accessible data. Only then can automation deliver on its promise of intelligent, scalable efficiency.

Workforce Augmentation and Skilling

AI-Driven Workplace Transformation



Description

As AI and automation become foundational to enterprise strategy, and as other fields such as robotics continue to advance, a critical risk is emerging, widening the gap between the digital skills businesses need and the talent they have. Despite fears that automation will replace jobs, the reality is that company growth increasingly depends on reskilling and upskilling employees to fully leverage AI and automation investments. Yet many organizations are struggling to find or develop the right mix of capabilities, especially as demand surges for expertise in AI, cybersecurity, cloud, and IT service management.

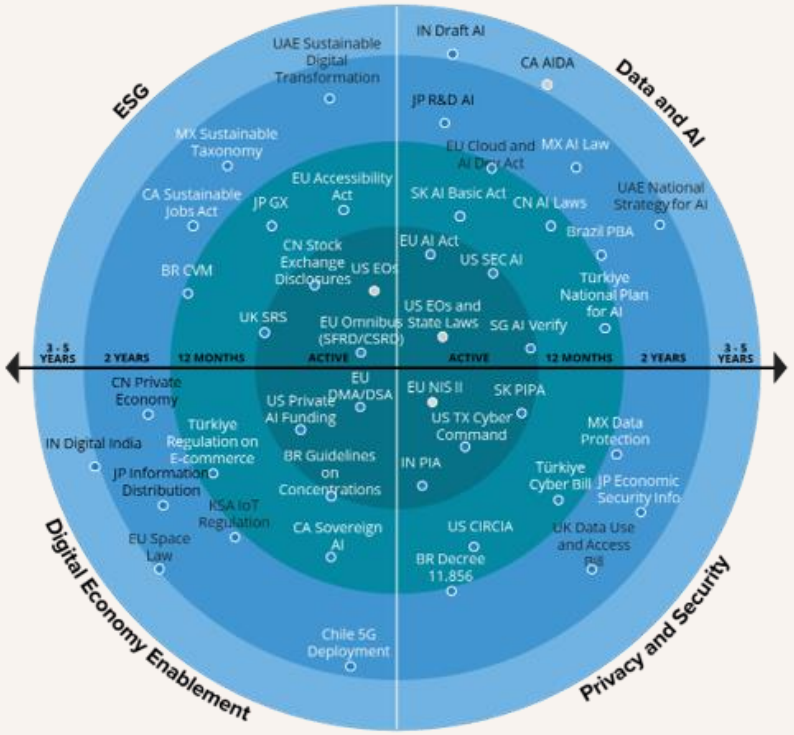
But technical skills alone won't be enough. Human-centric capabilities like creativity, collaboration, adaptability, and ethical reasoning are becoming vital, particularly as AI tools become more embedded in everyday workflows. Without proper socialization, awareness, and cross-functional support, even the most advanced AI initiatives risk falling short of their potential. This challenge is compounded by long-term demographic shifts. Aging populations and shrinking labor pools are tightening the talent market, making it harder to recruit and retain skilled workers. As a result, enterprises must rethink their organizational models and foster cultures of continuous learning, trust, and inclusion. Leaders must take accountability for enabling this shift, laying the groundwork for communication, collaboration, and growth across all levels of the workforce.

Context

The workplace has been shifting for some time, especially due to new modes of working, and the rise of AI and automation only further facilitates this shift. In the context of talent shortages, demographic changes, and other issues such as ESG concerns and ethical AI, it is clear that reskilling, upskilling, and overall transformation of workplace design are taking center stage. C-suite leaders and their teams must collaborate to recalibrate work culture, augmentation, and space/place, planning to enable more secure, dynamic, and refined organizations of the future.

Regulatory Shifts

Navigating Compliance Challenges in a Shifting Policy Landscape



Description

The global digital policy landscape has entered an era of fragmentation, creating a complex environment for enterprises and heightening the need for digital sovereignty. While regions like Europe, Japan, and China tighten regulations, especially around ESG, M&A, data privacy, and digital competition, the United States is taking a more deregulatory approach. This divergence creates an uneven playing field, with businesses navigating vastly different legal expectations. Adding to the challenge is the mix of “lead” regulations (e.g., tariffs, antitrust) that shape markets, and “lag” regulations (e.g., AI laws) that struggle to keep pace with innovation. This volatility demands strong internal governance.

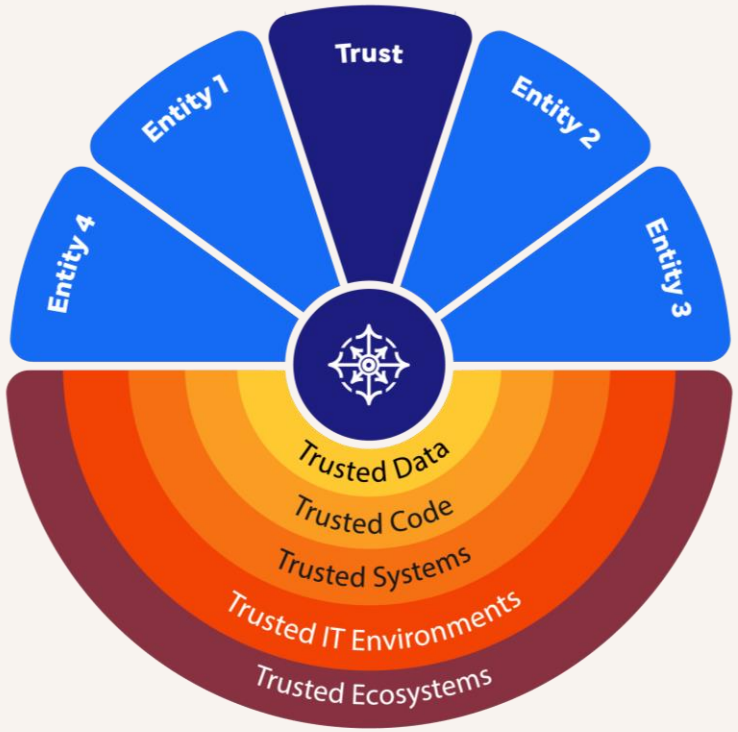
Enterprises are increasingly embedding compliance into their digital architecture, aligning data, AI, and legal frameworks through close collaboration between IT, legal, and compliance teams. As regulation evolves, agility is key. Organizations must adapt quickly without stalling innovation. Digital sovereignty is thus now a top priority, with many countries adopting sovereign cloud solutions to ensure data residency and operational control. With AI, sovereignty concerns are even more pronounced. Ultimately, regulatory readiness is a core capability rather than a back-office function and is essential for digital resilience, innovation, and growth.

Context

Businesses must navigate increasingly fragmented regulatory rules. Firms that stay ahead of the game and build resiliency will be best equipped to comply with these changing regulations. Moreover, regulations and policies are not always simply restraints, but they are also often springboards for investment, with many regulations proposing tax subsidies and other kinds of incentives.

Expanding Digital Security Frontiers

Fortification Against Multiplying Threats



Description

The digital era has brought massive interconnectivity across devices, people, data, and networks alongside a shift to the cloud. But this progress also increases exposure to sophisticated cyberthreats. Phishing remains the most common cybercrime, now supercharged by AI, making it easier to deceive victims. Meanwhile, cybercrime as a service is growing, giving attackers greater speed and scale. AI also introduces accidental insider risks, as employees may unintentionally expose sensitive data through AI tools.

And while quantum computing isn't mainstream yet, its progress is driving urgency around post-quantum cryptography. Organizations are shifting from reactive to proactive cybersecurity, but many organizations still struggle to keep pace with evolving threats. Shadow IT — and increasingly, shadow AI — adds further risk as AI tools proliferate without oversight. To stay resilient, businesses must build cyber-resilience: the ability to anticipate, withstand, and recover from attacks. This requires embedding security into digital architecture, fostering cross-functional collaboration, and preparing for rapid response, without stifling innovation.

Context

According to the International Monetary Fund, cyberattacks have more than doubled since the COVID-19 pandemic. Cyberattacks have impacted all types of organizations, from governments to universities to businesses, and are oftentimes entangled in geopolitical motives. The increase in high-profile data breaches is furthermore leading to increased policy interventions regarding privacy and sovereignty. Organizations that are unprepared for cyberattacks may suffer various consequences, including data loss, financial implications, harm to their brand reputation, decreased employee morale, and loss of customers.

Geopolitical and Trade Risk

Navigating Global Realignment

Description

Geopolitical tensions and shifting trade dynamics are reshaping the global business environment, introducing new layers of uncertainty and risk. From escalating tariffs and export controls to sanctions and supply chain realignments, enterprises are increasingly exposed to external forces that can disrupt operations, inflate costs, and stall growth. These risks are systemic, affecting everything from raw material sourcing to digital infrastructure deployment. Trade policies are becoming more volatile and unpredictable, often used as tools of geopolitical influence. The resurgence of tariffs, particularly in strategic industries like semiconductors, clean energy, and AI-related technologies, is forcing companies to rethink sourcing strategies and regional dependencies.

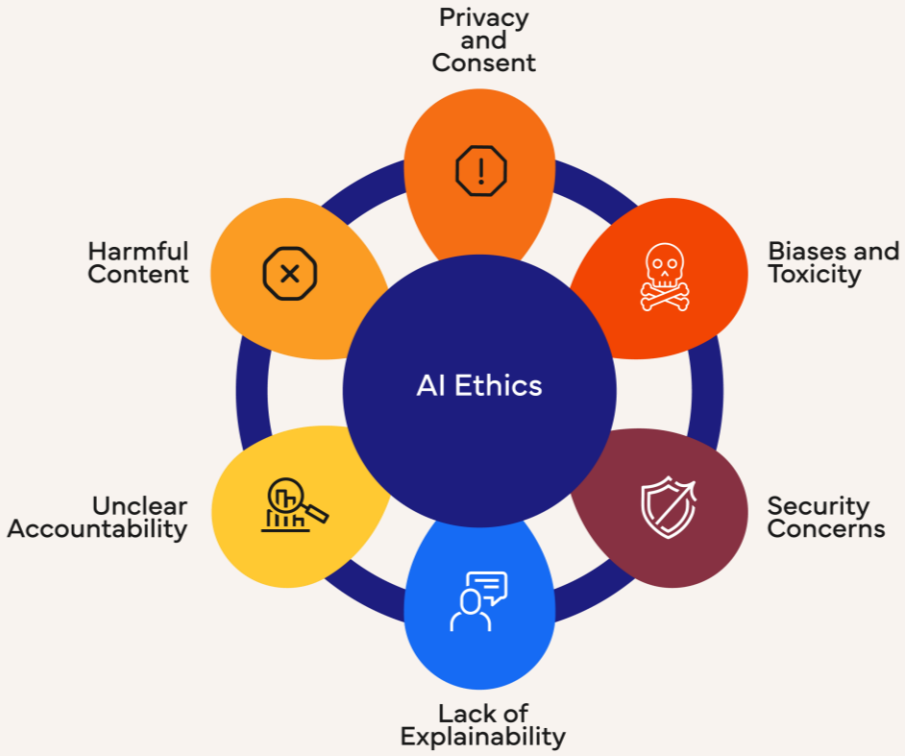
Meanwhile, rising tensions between major economies are prompting a wave of regulatory divergence and protectionist measures. In this environment, businesses must treat geopolitical risk as a core component of enterprise governance. This means building more resilient supply chains, diversifying market exposure, and embedding scenario planning into strategic decision-making. Legal, compliance, and risk teams must work closely with operations and IT to monitor policy shifts and ensure agility in response. As the global order continues to fragment, the ability to anticipate and adapt to trade and geopolitical shocks will be a defining factor in long-term competitiveness.

Context

Following the 2024 elections across the world, the geopolitical order began to shift. Owing to this, global business is entering a period of heightened geopolitical and trade uncertainty. What was once seen as background noise, such as tariffs, sanctions, and trade alliances, are now front and center in shaping enterprise strategy. Restrictions on semiconductors, energy subsidies, and innovation incentives are being used as levers of geopolitical influence increasingly. This volatility forces businesses to reassess long-standing assumptions about supply chain stability, market access, and regulatory predictability.

Trust and Ethics in IT

Balancing Innovation with Responsibility



Description

As AI and emerging technologies become deeply embedded in business and society, ethics is now a strategic imperative for building trust. Concerns around data misuse, algorithmic bias, job displacement, and AI hallucinations are prompting both consumers and employees to demand greater transparency, fairness, and accountability. Consumers want personalized experiences, but not at the cost of privacy or human connection. Internally, employees may resist AI due to fear or uncertainty, especially as GenAI tools raise risks of accidental data leaks. Beyond technical fixes, addressing these issues demands a culture of trust, inclusion, and continuous learning.

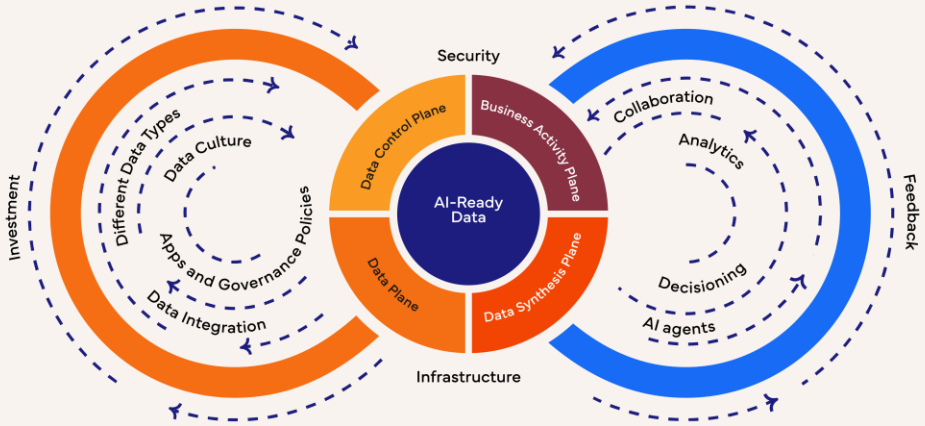
Ethical concerns are also expanding beyond AI to areas like robotics, quantum computing, and synthetic biology, introducing new challenges such as “roboethics” and quantum accountability. These are further complicated by cultural differences in ethical standards across global markets. To navigate this complexity, organizations must embed ethics into governance, product design, and change management, aligning IT, legal, HR, and leadership around shared principles. Done right, ethics becomes a catalyst for responsible innovation, enabling organizations to build resilience, earn trust, and grow with integrity.

Context

As technologies like AI, robotics, and quantum computing evolve rapidly, ethics and trust are becoming central to business and societal conversations. These tools now shape customer experiences, employee workflows, and strategic decisions, bringing both opportunity and scrutiny. Stakeholders are asking not just what these technologies can do but how and why they’re used. Concerns around data privacy, algorithmic bias, and AI-generated content are growing, and cultural differences further complicate what’s considered ethical across regions.

Data Strategies

Data Alignment and Governance



Description

In today's digital landscape, a clear data strategy is essential for leveraging technology and staying competitive. It starts with defining data as a strategic asset, aligned with business goals. Without shared definitions and taxonomies, AI and analytics risks are being built on weak foundations. Next, organizations must ensure intentional, ethical, and integrated data collection to minimize bias and ensure traceability. But even with data in hand, questions of authenticity and validity are critical, especially in an era of synthetic content, hallucinating AI, and data drift.

Real-time validation, lineage tracking, and anomaly detection are key. How data is managed determines whether it drives innovation or becomes a liability. Data governance must evolve from a compliance task to a strategic enabler, covering privacy, security, algorithmic transparency, and ethical oversight. Forward-looking organizations are also embracing data productization and monetization, treating data as a business asset with P&L accountability.

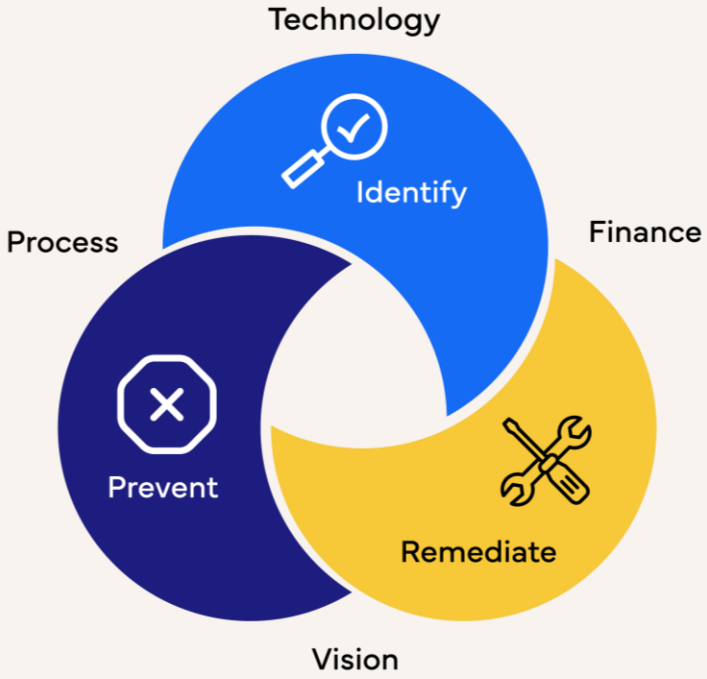
Context

In recent years, data and its quality are central concerns due to accelerated digital transformation, increased reliance on complex software systems, and the urgent need for rapid innovation with the emergence of AI. Data governance is often the more "boring" or "mundane" side of organizations' AI journey but ignoring it carries significant risk and potentially hampers AI innovation. As a result, organizations are turning again to the fundamentals of data and revisiting their strategies to better align with AI and automation investments.

Technical Debt

The Imperative to Modernize IT

Technical Debt Management Framework



Description

Technical debt is a growing concern driving CIOs to modernize IT systems. As technology becomes central to business, IT leaders are now business leaders, responsible for managing the risks of outdated infrastructure, patchwork systems, and rushed deployments. Technical debt shows up as bugs, inefficiencies, security gaps, and integration issues, all of which raise costs, slow innovation, and frustrate teams. Developers working with legacy systems face reduced productivity while businesses struggle to adapt quickly to change. In the AI era, data debt adds to the challenge, stemming from poor data quality, fragmented architecture, and lack of documentation.

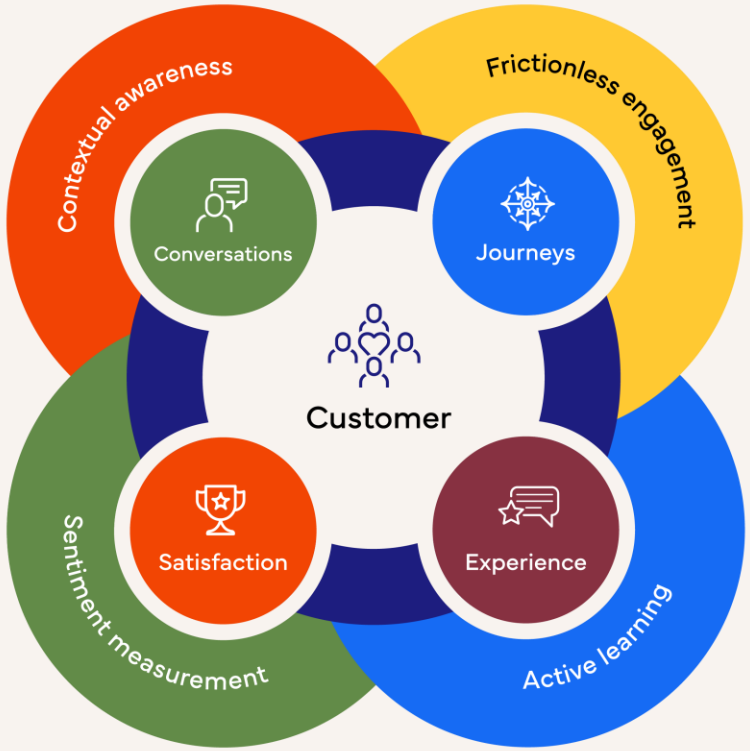
This undermines model accuracy and delays value realization. The result is cloud laggards become AI laggards. Organizations must treat technical and data debt as strategic, board-level issues. This means modernizing infrastructure, investing in scalable architectures, and embedding governance throughout the tech stack. IT leaders must champion cross-functional collaboration and continuous renewal to reduce risk and unlock the full potential of digital transformation.

Context

In recent years, technical debt is a growing concern due to accelerated digital transformation, increased reliance on complex software systems, and the urgent need for rapid innovation. The pressure to deliver software quickly often leads to compromises in code quality, resulting in a backlog of maintenance issues. Businesses face mounting pressure to address outdated code and quick fixes to maintain system reliability, security, and scalability amid evolving technological demands. As systems become more complex, the cost and effort to address these issues escalate, impacting operational efficiency and innovation.

Customer Expectations

More AI Moderation, Demand for Greater Empathy



Description

Businesses are rethinking customer engagement, aiming to deliver seamless, personalized, and efficient service experiences, and customers now expect nothing less. Emerging technologies like AI, automation, and IoT are transforming service delivery. AI-powered chatbots and virtual assistants handle routine inquiries with speed and personalization, freeing human agents to focus on complex, high-value interactions. The rise of mobile, AR/VR, and 5G/6G is pushing companies to adopt mobile-first, omni-channel strategies that ensure consistent experiences across platforms, from social media to live chat. In the B2B2C model, this complexity is amplified, requiring businesses to serve both direct clients and end consumers effectively. Behind the scenes, data analytics and CRM systems are key to integrating channels and understanding the full customer journey. Yet, even with advanced tech, the human element remains vital. Emotional intelligence and empathy are increasingly emphasized in training, as customers value authentic, respectful interactions. Ultimately, the future of customer service blends intelligent automation with human connection, creating experiences that are both efficient and emotionally resonant.

Context

The landscape of customer service is undergoing a transformative shift, driven by advancements in technology and changing consumer expectations. The shift toward mobile- and device-centric customer service strategies underscores the need for businesses to be agile and responsive, leveraging technology to meet customers where they are. Businesses now face the dual challenge of satisfying direct customers and end consumers in a digital, mobile-first world. Adapting to this landscape demands agility and a tech-savvy approach to meet evolving expectations and enhance connectivity.


IDC