IDC FutureScape

Charting the Agentic Future

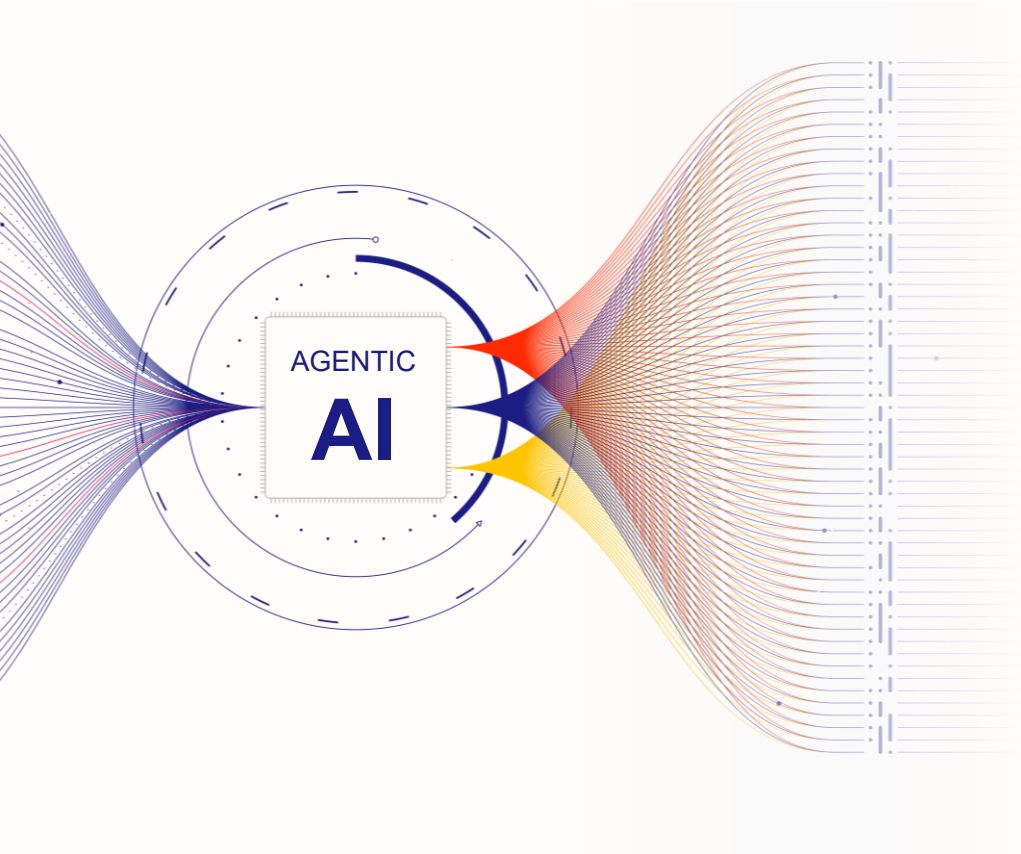
IDC APJ Predictions Shaping Leadership and Growth From 2026-2030

AN EXCERPT FROM IDC FUTURESCAPE 2026's SINGAPORE EVENT

November 14, 2025

#IDCPredictionsAP
#TechPredictions
#ChartttheAgenticFuture

Moving from AI Pivot to the Agentic Future



From PoC to Production

Scaling with Impact

As AI moves from experimentation to enterprise scale, our focus is on delivering measurable impact, not novelty. Building on our AI Everywhere momentum, we are entering the next phase, **embedding AI into core operations, services, and decision-making to unlock real business value.** From Agentic and Graph AI to intelligent automation and smart manufacturing, every initiative is designed to enhance relevance, reliability, and trust. By scaling proven innovations through disciplined frameworks and responsible governance, we aim to create an AI-powered organization that drives sustainable growth, operational excellence, and tangible outcomes across every market and function.

Unifying AI Governance

Collective Resilience

We strive to set the benchmark for ecosystem-wide resilience by connecting every part of our network from internal teams and subsidiaries to partners, regulators, and customers into a trusted, transparent defense system. **Our vision is to transform security from a compliance function into a living, learning ecosystem** - one that detects and adapts in real time, integrates predictive analytics, and actively involves users in safeguarding their digital experiences. In this next phase, **resilience is not just organizational, it's collective.**

Embedding AI into Business Strategy

Digital Orchestration

Tomorrow's CIOs aren't just technology stewards, **they're business architects**. Their role is to orchestrate technology, talent, and ecosystems into a cohesive engine that scales AI responsibly, builds resilience, and empowers continuous innovation. **In this new era, success is measured not by adoption, but by impact, where technology becomes a multiplier of growth and trust.**

Source: IDC APJ Future Enterprise Awards 2025 (These are based on tech buyer quotes/narratives and combined/summarized across multiple organizations); Italics – FutureScape 2025

CIO 3.0:

(From Tech Operator to Business Integrator) to

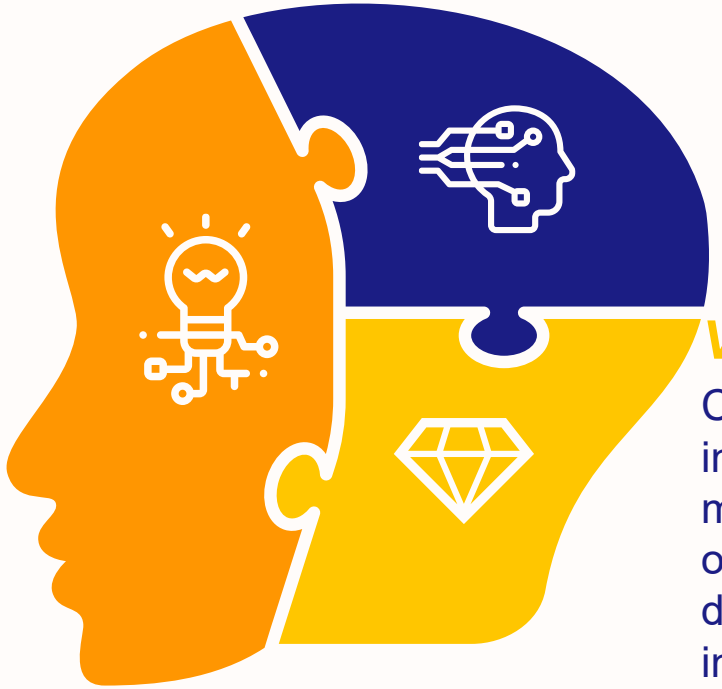
The Digital Orchestrator

Talent Architect

Orchestrate AI-driven workforce transformation, enabling people to work smarter and guiding change with empathy and foresight.

Resilience Architect

Modernize IT to align with the business and build ecosystemwide resilience, ensuring that trust and adaptability are embedded by design.



Value Architect

Connect digital investments to measurable business outcomes, turning AI, data, and innovation into growth multipliers.

The Primary Tech Buyer / Influencer

Source: IDC - The CIO's New Mandate: Empowering People, Driving Value, Leading with Resilience

A Digital Orchestrator in the Making

From Insights to Autonomy
The next phase is evolving from AI-driven decision support to full decision augmentation and automation, embedding intelligence across processes.

AI Starts at the Top
With strong executive sponsorship, AXA turns vision into value, embedding AI and data into its culture and empowering local teams to deliver tangible business impact.

Innovation without Fear
A “Fail-Safe Sandbox” - The value of psychological safety, creating a fail-safe environment where teams can experiment, learn from failure, and innovate confidently.

Value Before Velocity
AXA drives AI impact by focusing on high-value use cases. Every initiative is chosen for measurable impact, from driving customer growth through smarter cross-sell and retention strategies, to reducing claims fraud and error through automation, to boosting productivity in underwriting and operations.

Ecosystem Intelligence
The AI COE partners with tech and security experts, ensuring scalable, secure, and compliant AI operations that stay at the forefront of innovation.

Collaboration as a Superpower
AI and engrg teams co-develop and fine-tune solutions in rapid iterations. From prompt engineering to infrastructure setup, this co-creation model ensures agility, accuracy, and business alignment.

Perpetual Learning Culture
Transform project insights into standardized frameworks, enabling experts to share knowledge, bridge research with practice, and foster continuous learning across engineering teams.

AI Made Human
Translating technical complexity into simple, relatable stories and training turns fear into fluency and fuels mass adoption, building company-wide AI confidence.

Governance with a Conscience
A robust governance framework through risk assessments, defined oversight roles, and an inventory for accountability and ethical integrity.

Infrastructure that Thinks Ahead
Its COE provides a scalable, agile infra for dev / deploying / maintaining AI models, integrating on-premises + cloud systems through a microservice-based architecture.

Source: IDC Future Enterprise Awards 2025

Lead or Lag: The CEO's AI Reckoning

The New Growth Model.

By 2026, 40% of A1000 CEOs will focus AI return on investment (ROI) on growth, driving C-suite efforts to boost revenue and reinvent business models without growing head count.

The AI Scale Imperative.

By 2027, 50% of AI apps/services will fail to progress beyond proof of concept (POC), pushing APJ CEOs to launch AI centers of excellence (COEs) to centralize strategy and governance and scale AI initiatives.

The Agentic Talent Shifts.

By 2026, 37% of A1000 firms will use agentic AI beyond pilots, driving CEOs, CHROs, and business unit (BU) leaders to mobilize quickly to reshape orgs, careers, and roles at all levels.

Data as the Moat.

By 2028, 40% of A1000 CEOs will integrate industry and proprietary data sets to generate insight and build powerful economic moats, for resilience in an increasingly competitive business landscape.

AI in the Boardroom.

By 2030, 50% of A1000 CEOs will use agentic AI for strategic decisions, driven by market volatility, innovation speed, and the need for faster, intelligence-driven choices at the boardroom level.

66% of APJ CEOs believe that AI will offer their organizations a chance to reinvent business models in the next 3-5 years.

The top critical technology initiatives are:

- **Creating a digital business architecture**
- **Focusing on using tech to generate revenue**

Top AI discussion topics at the board level:

1. **AI for business innovation or competitive advantage**
2. **AI value assessment and ROI**
3. **AI talent and change management plans**

Source: IDC FutureScape 2026 – CEO (APJ - P10, P2, P9, P6, P5); WW CEO Survey, March 2025 (APJ N = 150)

Collaborate or Collapse: The C-Suite's AI Moment

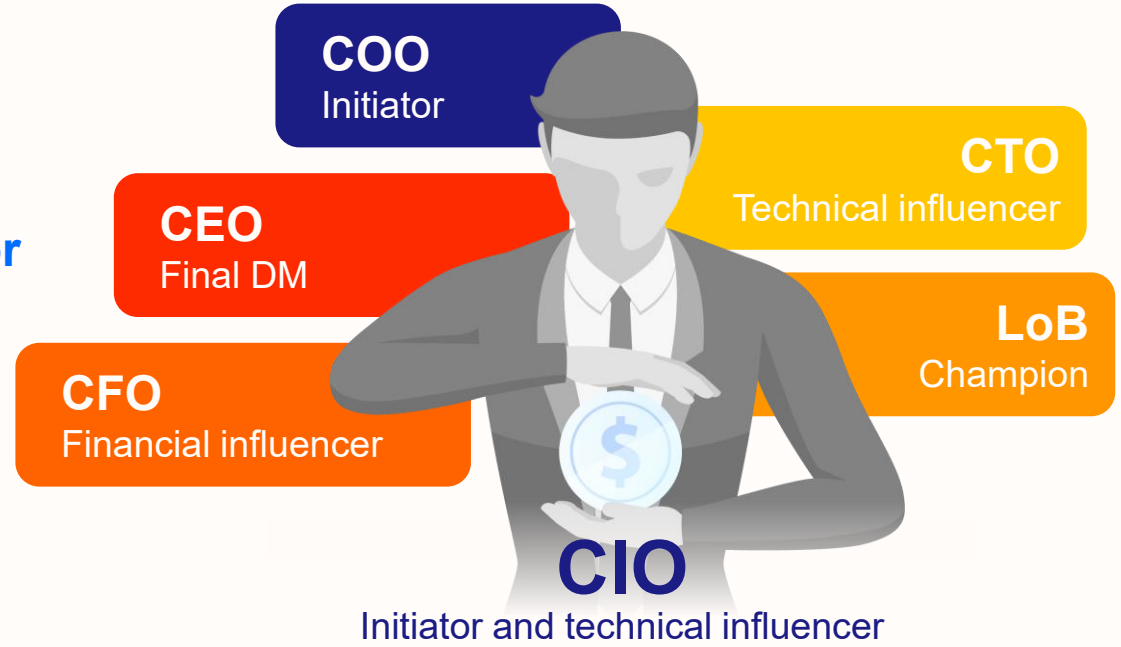
The Cross-Functional Leader.

By 2028, 60% of A1000 CIO roles will be held by transformational leaders who can implement new AI-fueled business models with enterprisewide consistency while modernizing IT to meet AI business needs.

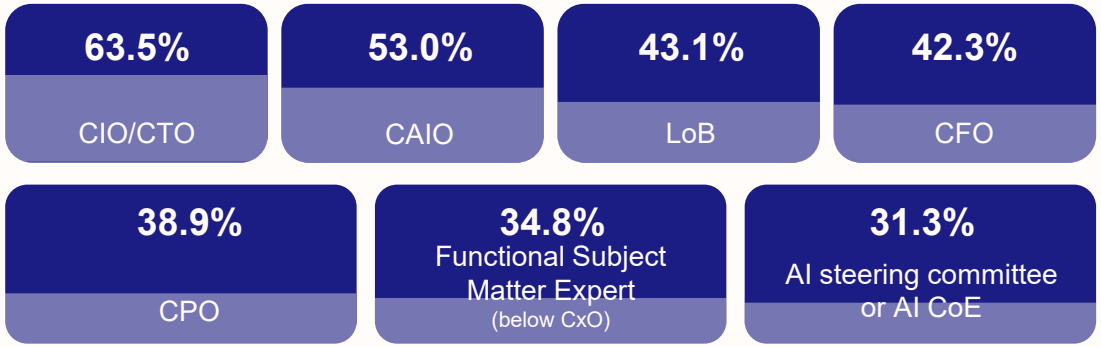
Cross-Functional by Design.

By 2028, 45% of APJ organizations will prioritize internal business and digital skills development via structured knowledge transfer initiatives, enabling scalable AI transformation across the company.

Who has the primary role for tech buying decisions?



AI funding decision makers



Source: IDC FutureScape 2026 – CIO Agenda (APJ-P2); AI-Fueled Business Strategies (APJ-P10); WW C-suite Tech Survey, Sept 2025 (APJ N = 300)

Innovate or Obsolete: The AI Growth Divide

From Efficiency to Invention.

By 2027, in APJ, there will be an increase from only 20% of all AI investments going to innovation to 35% of AI spend on new products and services.

AI-Fueled Lifestyle.

By 2029, 20% of consumers in mature markets in APJ will buy AI-designed clothing - with emerging markets following closely behind - fueling on-demand supply chains that cut returns and redefine fast fashion.

The Agentic Economy.

By 2030, 50% of new economic value generated by APJ digital businesses will come from companies that are investing in and scaling up their AI capabilities today.

"Dyson is actively building the foundational ingredients of intelligent digital commerce, owning the customer relationship via direct channels, embedding intelligence in products and marketing, and moving toward personalized experiences.

Opportunity: Dyson's next frontier will be search and recommendation personalization, introducing AI agents that help shoppers navigate products by use-case, context, price and need rather than by specs alone."

Source: IDC FutureScape 2026 – Banking & Payments (APJ-P10); Consumers (APJ-P9); AI-Fueled Business Strategies (APJ-P1); Future Enterprise Awards 2025

Measure or Miss: The AI Value Test

ROI Redefined. By 2027, 50% of A1000 CIOs will be tasked to create enterprise AI value playbooks, featuring expanded ROI models to define, measure and showcase AI impact across efficiency, growth and innovation.

Old ROI Formula

$$\text{Tech ROI} = \frac{\text{Net Income}}{\text{Cost of Investment}}$$

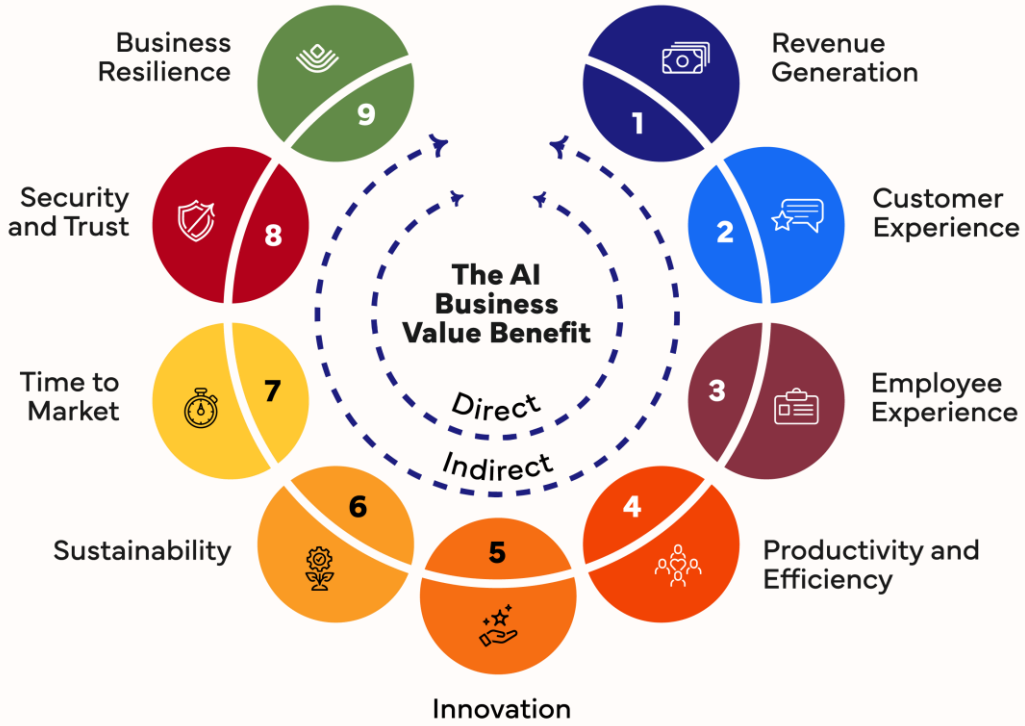
This is derived from the n-years sum of direct and indirect indicators (each year) across the nine AI Business Value Benefit Framework parameters

Value from 0 to 1, estimating the success probability (i.e. risk) of the specific use case and associated business value in the given timeframe

$$\text{AI* ROI} = \frac{\text{AI Business Value Income}}{\text{Initial Cost of Investment} + \text{Annual costs}} \times \text{Success Probability}$$

Initial investment and other one-time project, development, or change management costs of the investment, as explained in the previous section

This is given by the n-years sum of recurring annual subscription, cloud, or other annual maintenance costs



Scale or Stagnate: The Enterprise-wide Imperative

Scale with Control.

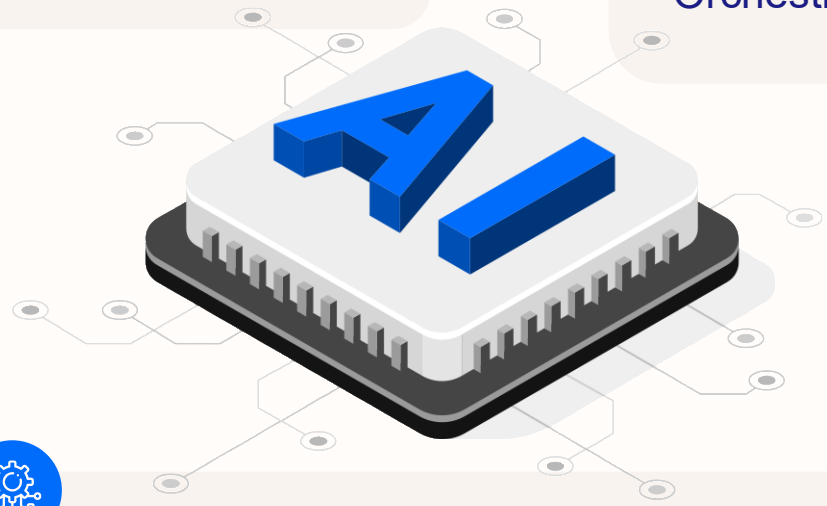
By 2030, 55% of APJ organizations will centrally manage the orchestration of AI agents to boost employee collaboration, seamlessly scale operations, and ensure ethical governance of AI deployments.

Composite AI.

In 2027, a renewed focus on traditional AI for explainability and reliability will drive 70% of APJ organizations to adopt composite AI, blending generative, prescriptive, predictive, and agentic technology.

Integration Capabilities, a Necessity for Agentic AI Solutions

Enhanced Scalability as the #1 Benefit in the Latest Multi-agent Orchestration Frameworks



Centralized Management Tools as the Most Effective Controlling Agent Sprawl in Agentic AI Implementations

Source: IDC FutureScape 2026 – AI-Fueled Business Strategies (APJ-P9); IT Industry (APJ-P1); Global AI Tech Buyer Survey, April 2025 (APJ N = 669); Global AI Technology Trends, June 2025 (APJ N = 666)

Learn Fast or Fall Behind: The AI Learning Divide

By 2029, A500 organizations that measure human-AI collaboration will have operating margins up to 15% higher than those prioritizing AI productivity alone.

Workforce Change Management Approach as AI Scales in APJ Organizations

2.8%	An ad-hoc approach with no centralized leadership or enterprise-wide strategy
15.4%	An opportunistic and case-by-case approach with an AI oversight function
16.3%	An established approach with repeatable steps and outcomes
32.9%	A managed approach with a redesigned operating model to navigate the growth of AI deployments
32.7%	**An AI-fueled model with continuous AI deployments and simultaneous workforce adjustments**

Top 3 success metrics - Ops Efficiency, Productivity and Innovation

Middle Management requires the most upskilling

Source: IDC FutureScape 2026 – FoW (APJ-P2); WW FoW Survey, Aug 2025 (APJ N = 400)

Unify or Unravel: The Data Intelligence Imperative

Edge Inferencing.

By 2030, up to 50% of enterprise AI inference workloads in APJ will be processed locally on endpoints or edge nodes, reducing cloud traffic and latency while supporting greater control over sensitive data.

Sovereign Data.

By 2028, CIOs at multinationals will boost investments in modular, sovereign-ready cloud and data localization environments by 45% to future proof operations against rising sovereignty demands.**<AIA: Own your data – knowledge graph and vector databases.>**

Ecosystem Data.

By 2028, 30% of A1000 firms will share data with ecosystem partners to build domain-specific AI, driving high-impact use cases while ensuring strong governance, security, and ethical controls. **<AIA: Build once, Replicate everywhere.>**

Agent to Agent.

By 2029, 50% of the A2000 will deploy autonomous enterprise intelligence agents, driving dynamic event-driven, transformative data management and governance enhancing quality, tracking, and efficiency.

"A robust data infrastructure must precede GenAI deployment. Many organizations prioritize AI tools over data integrity, resulting in unreliable outputs and customer distrust."

AIA Group

Source: IDC FutureScape 2026 – Connected Devices (APJ-P9): CIO Agenda (APJ-P1); AI-Fueled Business Strategies (APJ-P7); Data and Analytics (APJ-P9); Future Enterprise Awards 2025

Orchestrate or Overwhelm: Managing AI Complexity

By 2026, 40% of Asian organizations will miss AI goals because of implementation complexity, fragmented tools, and poor life-cycle integration, prompting CIOs to increase investment in unified platforms and workflows.

73%

of APJ Org Manage / Plan to Manage Agentic AI Centrally

The Rise of AI Factories

By 2028, 55% of A2000 enterprises will operate AI factories as core AI infrastructure, and forward-looking governments will emulate, enabling AI deployment five times faster than those without.

APJ Agentic AI Implementation Trends (2026-2030)

73.9%
AI-powered co-creation platforms

66.9%
Fully personalized user experiences

61.6%
Autonomous decision-making agents

52.1%
Cross-domain collaborative AI agents

30.4%
Multi-vendor agentic mesh/chain of agents

Source: IDC FutureScape 2026 – CIO Agenda (APJ-P6); AI and Automation (APJ-P9); APJ Agentic AI Survey, April 2025 (APJ N = 670); Future Enterprise Awards 2025

Modernize or Stall: Competing in the Age of AI Acceleration

Reinvesting in the Private Core.

By 2026, 60% of organizations will actively reinvest in private IT infrastructure to promote hybrid cloud consistency, improving data privacy, business resilience, performance, and cost optimization.

Sovereign AI is becoming a strategic priority
<control over sensitive workloads>

The rise of new AI workloads
<diverse and specialized>

The New Compute Economy.

By 2030, 60% of datacenters will run workloads on a mix of CPUs, GPUs, QPUs, NPUs, LPUs, APUs, and DPUs, enabling significantly faster and more power-efficient processing across targeted applications.

Cloud Modernization.

By 2027, the massive computational and data demands of AI will compel 75% of APJ organizations to modernize legacy cloud environments by shifting to new platforms specifically designed for AI workloads.

To deliver on-demand performance

The competitive pressure to deliver

Inferencing Shift to the Edge.

By 2028, as the focus of AI shifts from training to inferencing, 60% of organizations will deploy distributed edge infrastructure to improve the latency and responsiveness of AI applications.

"Modernization isn't just about replacing legacy systems, it's about reimagining architecture for scale, automation, and data access."

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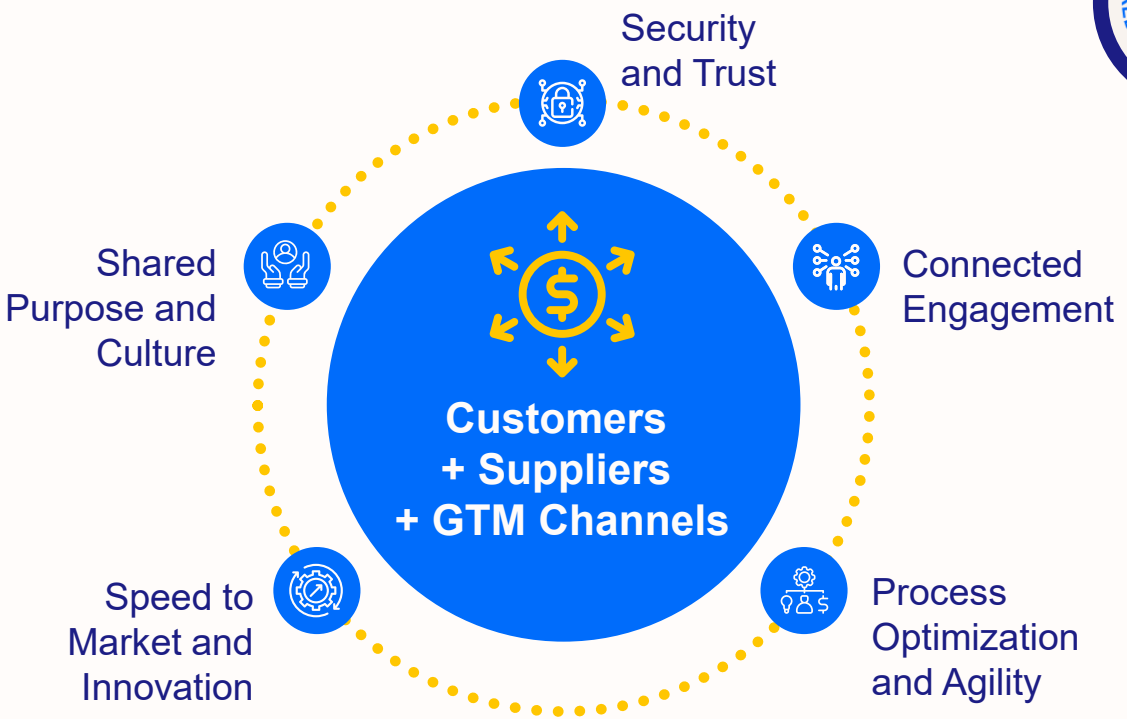
开泰银行 KASIKORNBANK

Source: IDC FutureScape 2026 – Digital Infrastructure (APJ - P10, P4, P8); IT Industry (APJ-P6); Future Enterprise Awards 2025

Connect or Fragment: Building Collective Resilience



Agent Economy.

By late 2027, 30% of organizations will manage multi-agent experiences that span multiple channels, applications, and suppliers, enabling more seamless and context-rich experiences.

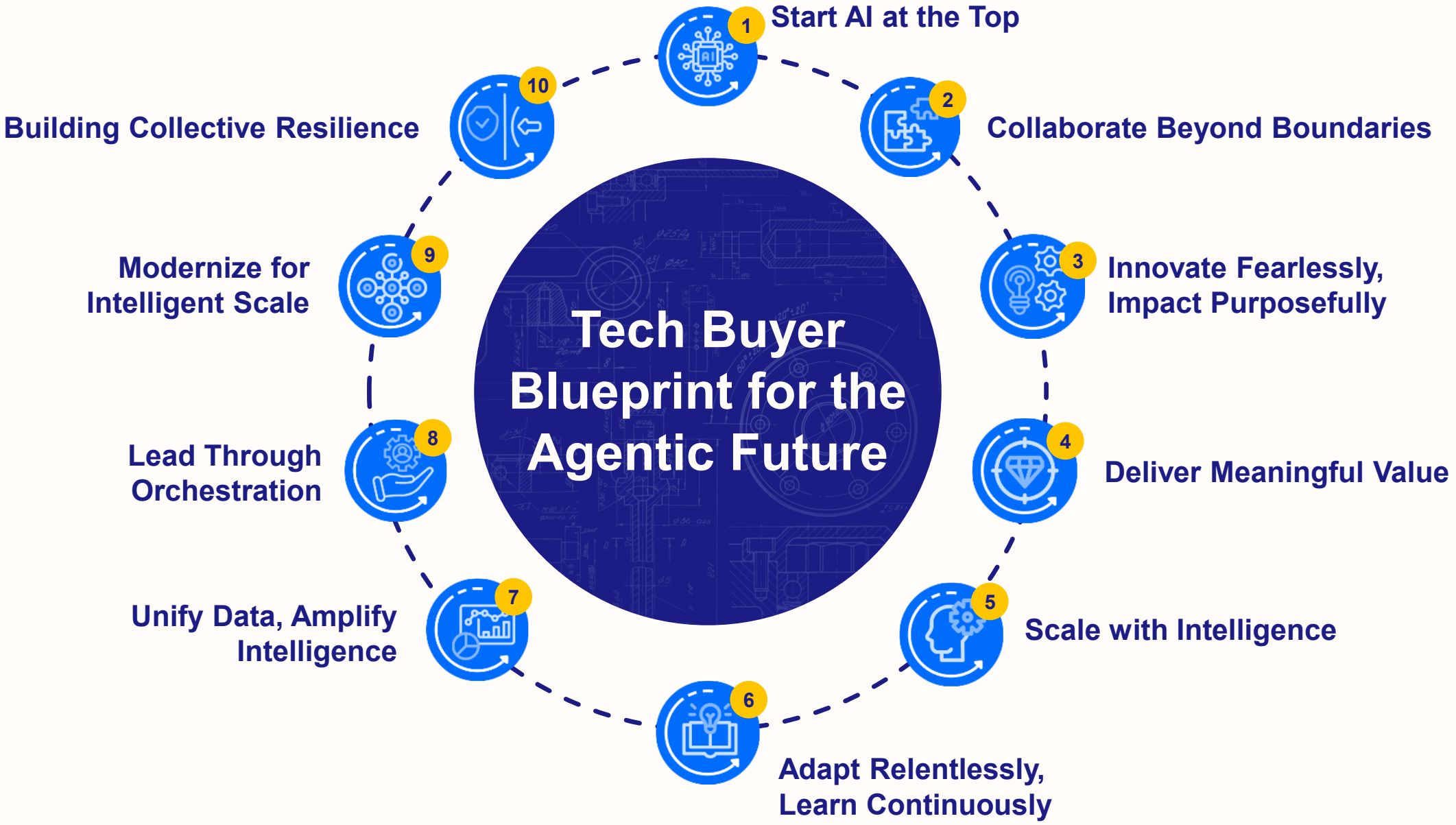
- Real-time engagements
- 24*7 accessibility
- Proactive outreach
- Agent to agent interactions
- Autonomous and adaptative supply chains

kao

Precision LifeCare.

Through its Precision LifeCare platform, Kao developed the Virtual Human Body Generative Model, using APIs to estimate lifestyle, personality, and health data, then predict body conditions and disease risks. This model powers personalized health insights not just for customers, but for Kao's entire ecosystem of partners, demonstrating how AI can drive continuous learning, adaptability, and shared value.

Kao Japan



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