IDC FutureScape

Services AI:

Transforming for the Agentic Future

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The Shifting Landscape

Platformization of Services

By 2029, 30% of APJ IT services will be delivered as modular, platform-enabled products, driven by demand for speed, transparency, generative artificial intelligence (GenAI), and agentic AI-enabled autonomous service orchestration.

Changing Client Expectations

By 2030, driven by significant architecture changes in the enterprise IT landscape due to agentic AI, 30% of all contractual engagements with service providers will be outcome-based.

Talent Disruption

By 2030, 35% of A2000 enterprises will require additional justification for the contracting of traditional human talent instead of prebuilt customized AI agentic resources from service providers.
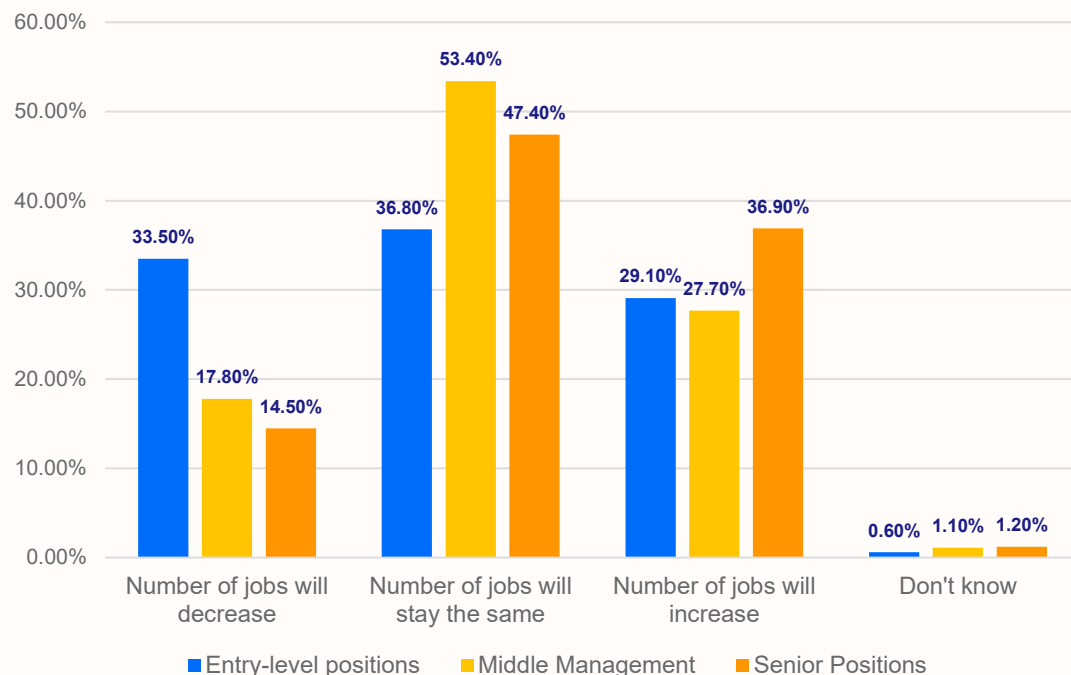
The Agentic Impact on 'the Firm' (and Jobs)

Vision Statement: Lean organizational structures will emerge as employees at all levels are elevated with agentic AI, and knowledge work will be fundamentally reshaped to deliver value and perform specialized tasks.

How will organizational restructuring be impacted in the next 18 months by your company's adoption of AI including Agentic AI?

Legend:
- Entry-level positions
- Middle Management
- Senior Positions

Chart data:

Category	Entry-level positions	Middle Management	Senior Positions
Number of jobs will decrease	33.50%	17.80%	14.50%
Number of jobs will stay the same	36.80%	53.40%	47.40%
Number of jobs will increase	29.10%	27.70%	36.90%
Don't know	0.60%	1.10%	1.20%

Impact:

In the next 18 months entry-level positions will be negatively affected by the adoption of AI (including Agentic).

The C-Suite is not insulated from the impact of AI either. 44% said that the integration of AI technologies has most impacted the decision-making in strategic planning and forecasting (IDC 2025 C-Suite Tech Survey) .

Organizational structures are likely to flatten with the number of jobs in middle and senior position staying the same.

As technology and organizations mature, agents will move from helping with rote tasks to assisting with more complex processes and strategic initiatives.

Leaders must be mindful of the decline in entry-level roles, as these positions are essential for developing future middle and senior leadership.

Meanwhile, the barrier to entry lowers for entrepreneurs, with the force multiplier of agentic technology. The market should anticipate more start ups and smaller organizations reaching unprecedented growth.

The Future of Business Processes and Workflows
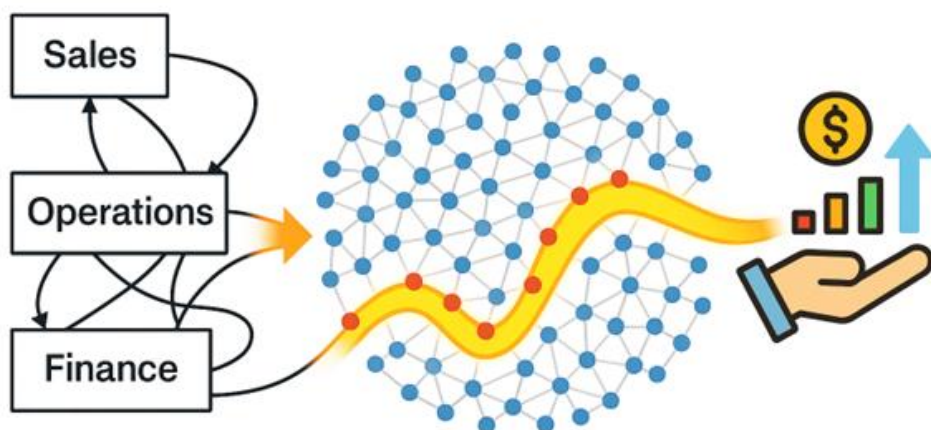
Implications for the Vendor Ecosystem:

Vendors will increasingly ensure their agents comply with open integration standards (e.g. MCP and A2A), enabling seamless communication and collaboration across platforms.

Vendor-provided supervisory agents will take ownership of specific business processes and workflows, influencing how customers perceive and manage the transfer of process ownership to vendors.

Vendors must collaborate with the broader services ecosystem, acting as business integrators and orchestrators to unlock the full value of agent swarms.

Vendors will need to implement robust security and data protection controls to enable safe inter-company and ecosystem-wide collaboration.

Key Takeaway: While humans will be required for critical issues, as agentic technologies improve and adoption increases, business leaders will be more comfortable with AI agents making decisions, enabling increasingly complex business processes without human intervention.

Agents Across the Service Delivery Value Chain

Project Oriented Services

Consulting · Ent Apps · Industry

- Onboarding
- Insights
- Discovery
- Assessments
- Benchmarking
- Planning
- Risk
- Regulatory

Managed Services

Network · Cloud · End Points
BPO · Security · Application

- Help desk
- Monitoring
- Observability
- Predictive
- Remediation
- Testing
- Workflows
- Compliance

Support Services

Hardware · Software · ITSM

- Diagnostics
- Remote
- Provisioning
- Configuration
- Alerts
- Proactive
- Experience
- Asset management

The Reinvention of Services

Key Trends

AI-augmented consultants

Outcome-based services

Productized IP and platforms

Case Study

→ 12% increase in sales

→ 25% reduction in steps taken in sales processes

→ 30% reduction in events, while generating a $17 billion pipeline

→ 5% revenue growth

→ 30% cost reduction in sales operations

→ 3x win rate on pursuits with strong qualification

→ 72% decrease in data management effort

→ Improved seller experience and business agility

→ Proposal automation reduced first draft RFP response time to 1 hour, and full proposals to 4 hours

→ Predictive and prescriptive insights (e.g., win probability predictor, quarterly sales projection)

→ GenAI digital workers (e.g., digital bid manager, analytics advisor) further streamlining operations

The New Value Equation

Focus		From	To
Influence, Creativity, Relationships		**Time and Materials**	**Outcomes and Impact**
Nuanced Contextual Understanding		**Expertise**	**Insight and Enablement**
Strategic Judgement		**Projects**	**Platforms** / **Actions**

> "What we want is co-creation, not just advice. Data insights, stewardship and application to business transformation is important to us. We want continuous value, not episodic delivery…"

Dayle Stevens
Executive director of Data and AI, and joint venture co-CEO, Telstra

Agentic AI of Services Maturity

Phase 1
Agentic-Exploration & Experimentation

- Services are primarily delivered by services staff, with AI used for basic automation and analytics in select client engagements.
- The value and purpose of agentic AI is on productivity enhancement, with playbooks and early-stage agentic AI governance models.

Phase 2
Agentic-Assisted Delivery

- AI agents supplement delivery resources in a minority of engagements, serving as copilots to execute highly repeatable and low risk tasks (e.g. code review, test case generation).
- Value and purpose of agentic AI expands from productivity enhancement to cost savings and time to value.
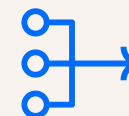
Phase 3
Agentic-Semi-Autonomous Delivery

- AI agents begin to be assembled as teams and agent pods and supplement service delivery with taking on -- and fully executing -- well-bounded tasks in an increased percentage of engagements.
- The value and purpose of agentic AI centers on throughput and reliability and offloading reliance on manual service execution.

Phase 4
Agentic-Scaled Delivery

- AI agents operate in networks, with inter- and intra- agent and service delivery team coordination across engagements, and agents (and agent pods) emerge as center of excellence for services delivery.
- The value and purpose of agentic AI shifts to driving scaled efficiency and enabling services staff to focus on higher value tasks (e.g. strategy, DCF analysis, business case development, innovative architectures).

Phase 5
Agents As Services

- AI agents handle significant portions of delivery autonomously across the full lifecycle of IT services.
- The value and purpose of agentic AI centers on the highest level of service delivery optimization (i.e. cost savings, productivity, profit, throughput, velocity) enabling providers to flexibly and versatilely engage with a wider span of clients to deliver services.

The Agentic Services Playbook

Set Metrics For Agentic AI Evolution

- Business Impact metrics
- Pricing metrics
- Operational and adoption metrics
- Technical and Model Performance Metrics

Invest in Agentic Services Platforms

- Shared scale for all users
- Ensure utilization and effectiveness is tracked through effective governance
- Support innovation from all parts of the business

Evolve Financial, Operating and Talent Models

- Predictability and reliability of services transformation
- Use and measure agent performance data to tune staffing and pricing models more effectively
- Manage culture and change in talent transformation and learning

Establish Trust and Risk Management

- Standardize trust, control and audit mechanisms throughout the firm
- Create risk tiers and deployment guardrails for every agent in every service line from a shared taxonomy
- Increase transparency and explainability methods to maintain accountability

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