

PANEL

Inside the Trends Driving the AI Economy



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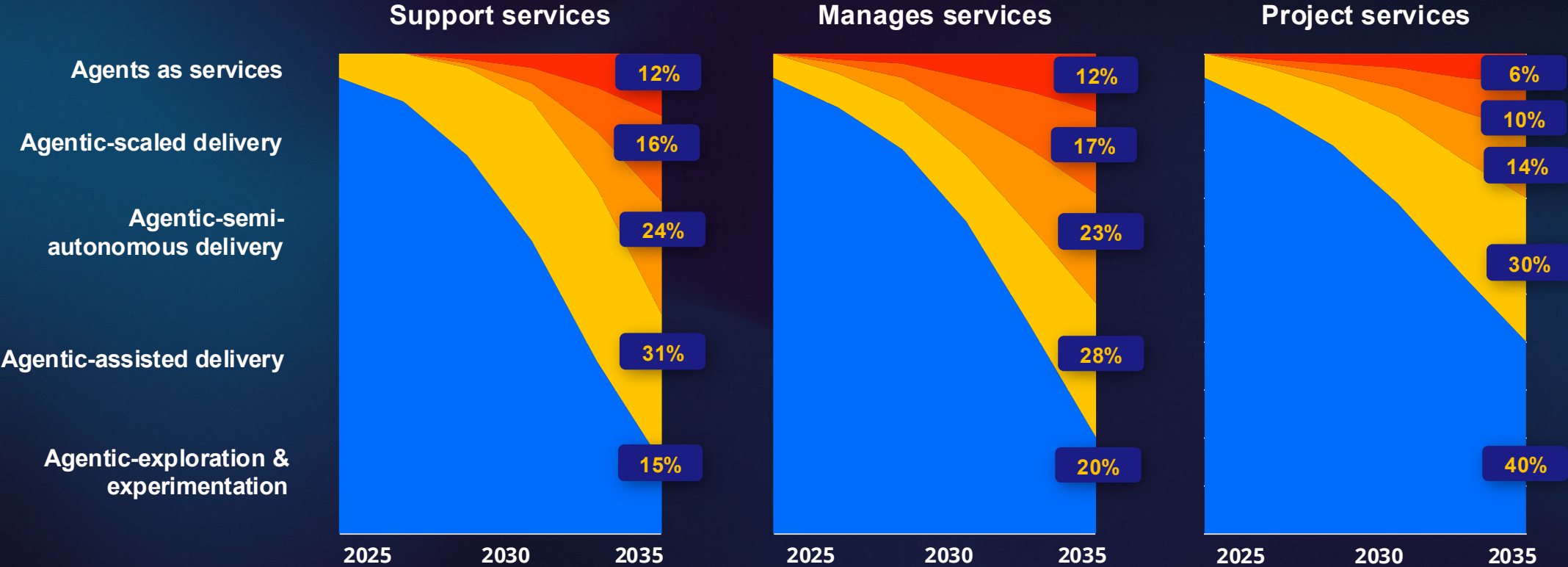
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Managing Director, IDC China



Agentic evolution of services delivery

Timing and distribution of adoption by phase & by service type



Service delivery evolves from human-led to agent-led models across support, managed, and project at a varying pace depending on service provider readiness and investments in agent-led delivery and client's readiness to accept and trust agentic-automation service delivery.



Token economics have collapsed

Lower delivery cost. Higher infrastructure spend. 2020 → Today!

\$32

launch-era benchmark
per 1M tokens

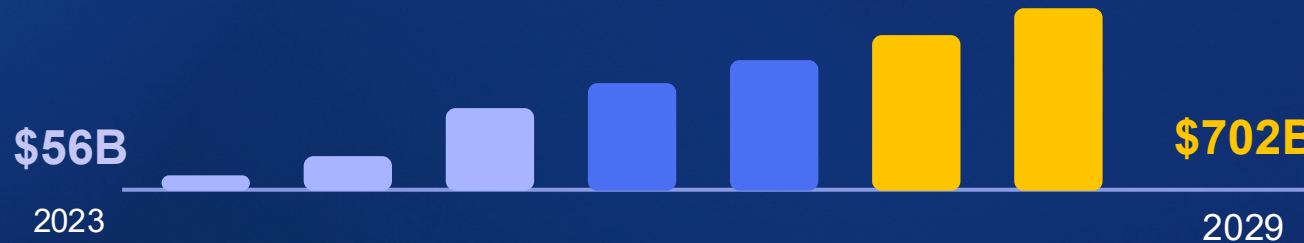
GPT-3 API beta •
June 11, 2020

**>300x
cheaper**

<10¢

Today's benchmark
per 1M tokens*

**AI compute HW
spend keeps
rising**



12.5x ↑

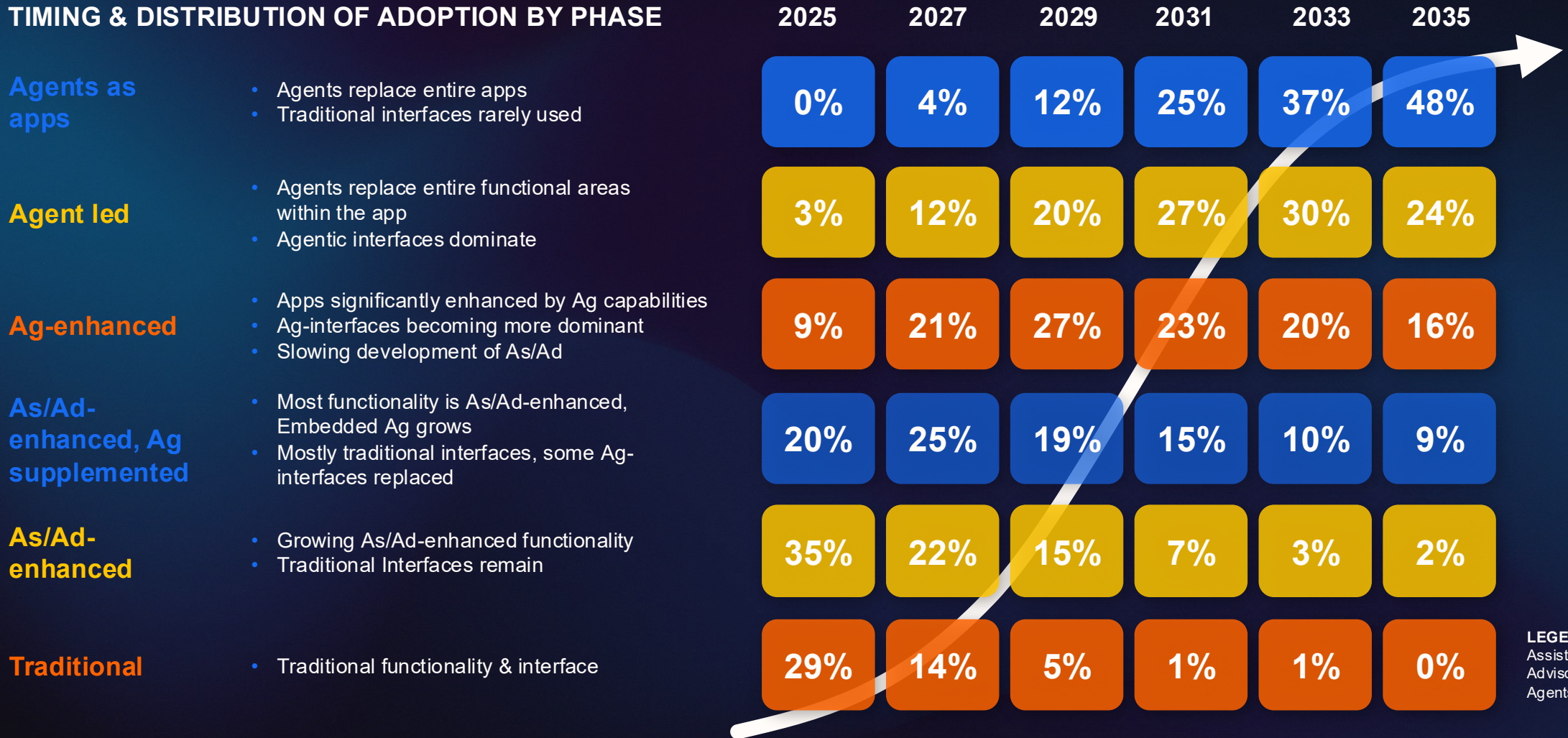
2023 → 2029

IDC forecast



The agentic evolution of enterprise applications

TIMING & DISTRIBUTION OF ADOPTION BY PHASE



LEGEND
 Assistants (As)
 Advisors (Ad)
 Agents (Ag)

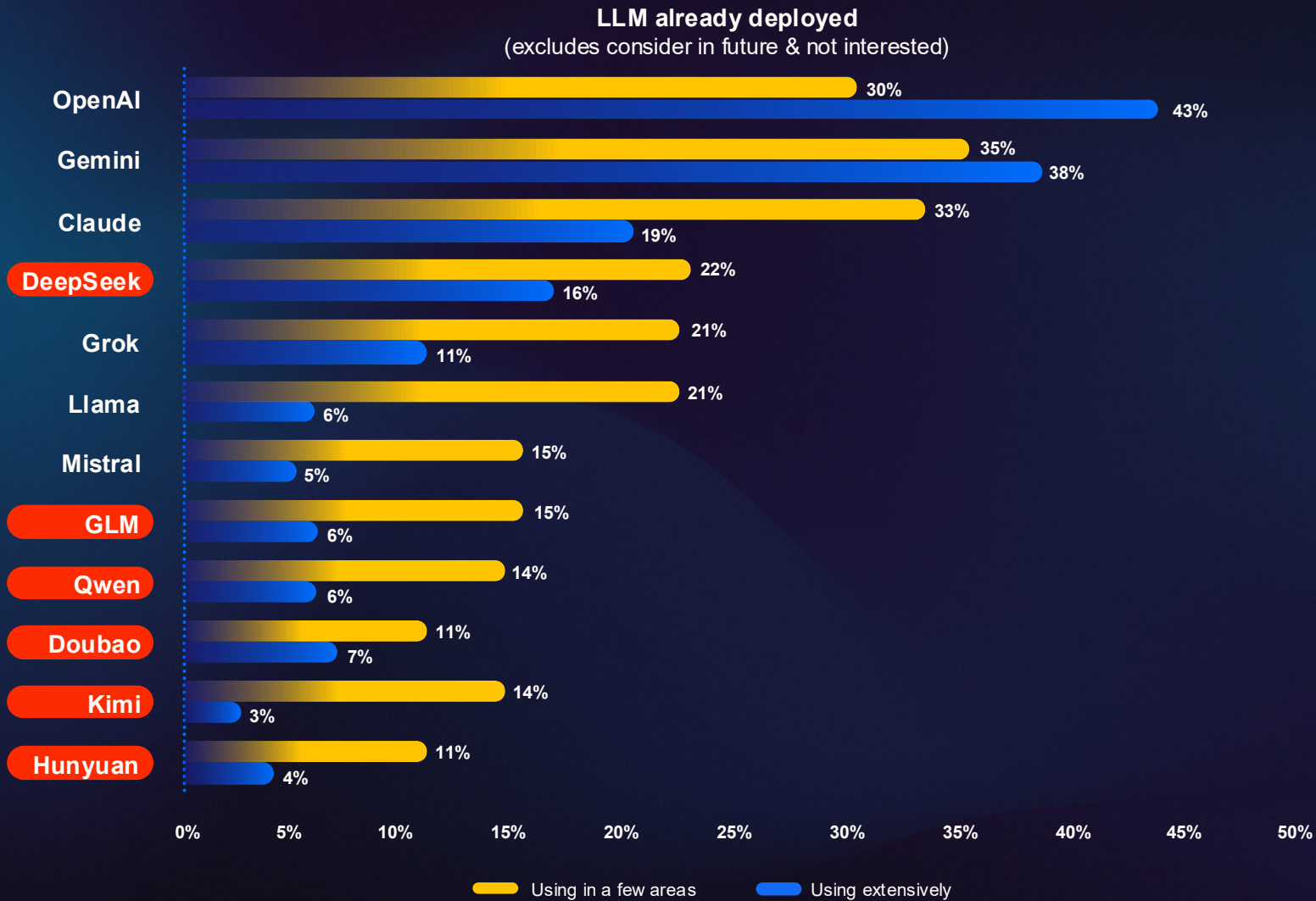


The agentic evolution of enterprise applications

PRICING MODEL EVOLUTION	2025	2027	2029	2031	2033	2035
Traditional/Perpetual software license	26%	20%	15%	12%	9%	7%
Subscription pricing	60%	56%	50%	44%	40%	36%
Consumption pricing	11%	18%	25%	29%	32%	33%
Outcome / job-based pricing	3%	7%	10%	15%	19%	24%



Global LLM adoption trends: US leadership, China scaling at speed



Source: FERS Wave 2 2026, N=1000

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From super apps to enterprises: How China's platforms are driving agentic AI adoption

Year of the Horse AI fun challenge



Alibaba Qwen invites you for milk tea

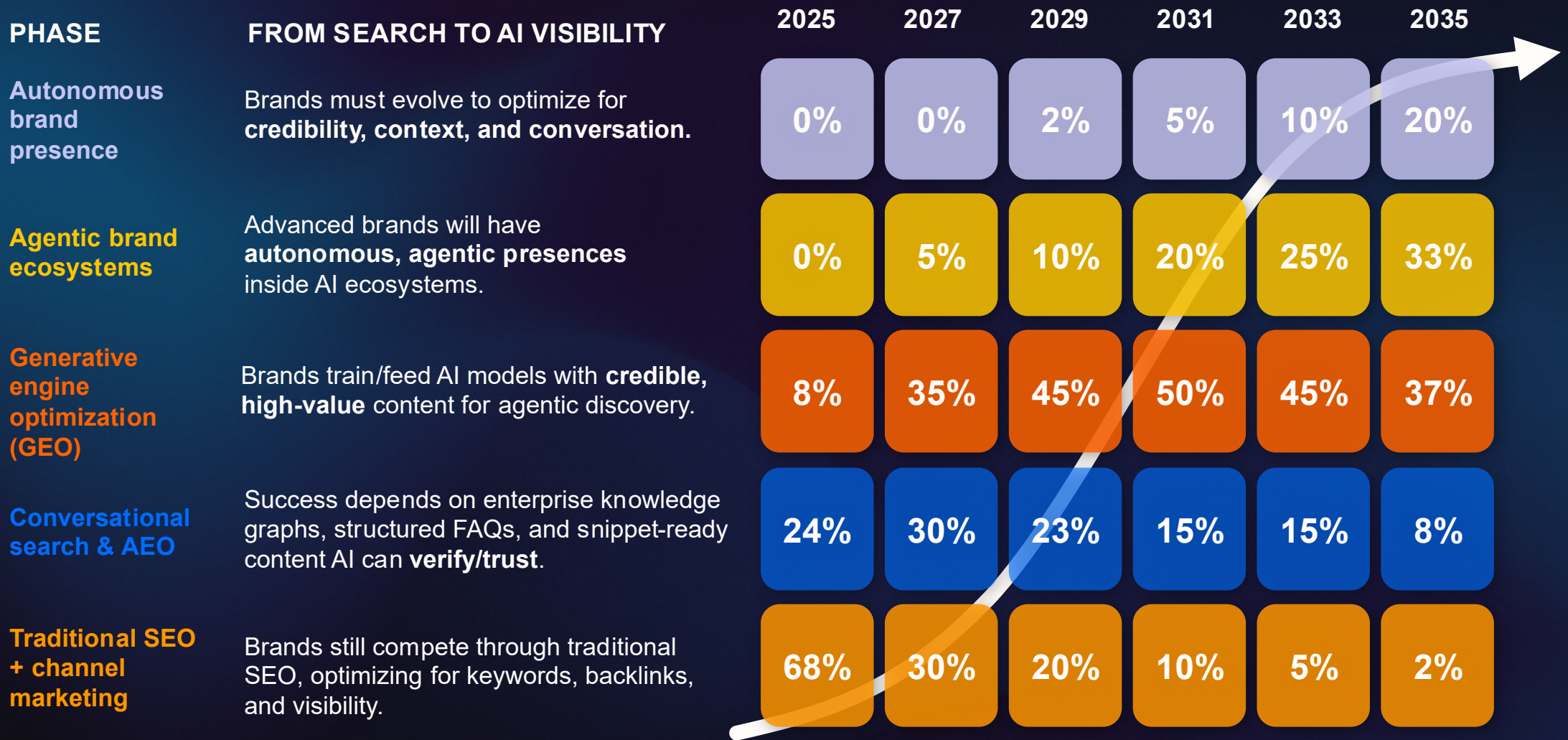


Tencent Yuanbao sends red packages



ByteDance Doubao's spring festival gala stage

AI discovery: Where decisions are being shaped



Robotics made in China: Scaling to global dominance

	2025	2030
General-purpose robot		
Humanoid robot	18K	490K
Quadruped robot	79K	915K
Service robot		
Delivery robot	82K	211K
Commercial cleaning robot	39K	146K
Consumer cleaning robot		
Smart vacuum	24M	35M
Lawn mower robot	2M	6M
Pool cleaning robot	4M	7M
Window cleaning robot	2M	7M



 IDC
DIRECTIONS