IDC FutureScape

From AI Deployment in Practice to Emerging Capabilities



This document summarizes the Key Takeaways from IDC Asia/Pacific's annual predictions event in Singapore.

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Human Agent Interaction



What will future human-agent interaction look like?

- Financial Services
- Supply Chain & Manufacturing
- Retail
- Telecom
- Public Sector

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Financial Services in APJ:

Human Agent Interaction



IDC PREDICTION

Constrained by unresolved agent-identity and fraud standards, only **20%** of APJ banks will implement fully autonomous agentic commerce payment capabilities by **2029**, even as demand grows 150% y/y.

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Source: IDC FutureScape 2027-Financial Services #3 (APJ)

Supply Chain & Manufacturing:

Human Agent Interaction



IDC PREDICTION

With continuing advances in AI, by 2029, **60%** of A2000 supply chain organizations will deploy AI agents as the primary interface between workers and functional applications.

Workers
Planners, buyers, schedulers, operators

▲ Requests and approvals ▼

AI agents
Take requests, plan, act, escalate exceptions

▲ Reads and writes ▼

Functional applications
Planning, procurement, execution, MES

72% of APJ manufacturers are piloting or running agentic AI in production

28% of APJ manufacturers using agentic AI apply it to supply chain planning

Sources: IDC FutureScape 2027 – Manufacturing and Supply Chain #1 (APJ) , IDC Supply Chain Survey, May 2026, and agentic AI early adopter survey (IDC #US54660526, Jul 2026 IDC Worldwide Manufacturing Survey, Aug 2026, APJ n=365.

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Public Sector:

Human Agent Interaction



IDC PREDICTION

In 2027, **90%** of APJ public sector organizations will deploy AI agents and autonomous systems alongside human workers, compelling **30%** to implement workforce transition plans and hiring reform.

59% of APJ government organizations currently use agentic AI.

41% of APJ government respondents say human supervision either becomes a bottleneck that makes workflows hard to scale

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Sources: IDC FutureScape 2027 – Government and Education #1 (APJ), IDC 2026 AI Business Trends Survey, n(APJ public sector) = 32.

Universal Connectivity:

Human Agent Interaction



IDC PREDICTION

With AI-driven traffic demands, **65%** of enterprises will operate at least three redundant WAN transport types, such as fiber, wireless WAN, and satellite, by 2030.

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Source: IDC FutureScape 2027 – Universal Connectivity Alters the World #2 (APJ)

What holds back Scale?

Four constraints:

Regulation, Trust and security, Infrastructure, People and skills.



Regulation

Diverging AI compliance mandates



Trust and security

Agent-identity and fraud standards



Infrastructure

Datacenter power and grid capacity



People and skills

Agent-governance roles and teams

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Financial Services in APJ:

What holds back Scale?

Regulation

Diverging AI compliance mandates



IDC PREDICTION

With diverging AI compliance mandates, **60%** of financial services firms in APJ will limit cross-border AI deployments to single-jurisdiction rollouts by **2028**.

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Source: IDC FutureScape 2027 – Financial Services #4 (APJ)

Financial Services in APJ:

What holds back Scale?

Infrastructure

Datacenter power and grid capacity



IDC PREDICTION

Faced with utility grid capacity constraints, **25%** of APJ financial services organizations will deploy onsite power generation for their primary datacenter requirements by **2030**.

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Source: IDC FutureScape 2027 – Financial Services #8 (APJ)

Universal Connectivity:

What holds back Scale?

Application performance & availability

Infrastructure

Datacenter power and grid capacity

IDC PREDICTION

With misaligned network infrastructure expectations, **60%** of APJ enterprises adopting agentic AI for mission-critical applications will face performance degradation and availability issues by 2028.

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Source: IDC FutureScape 2027 - Universal Connectivity Alters the World #9 (APJ)

Manufacturing and Supply Chain:

What holds back Scale?

Trust and security
Agent-identity and fraud standards

IDC RACI for AI, from most to least AI autonomy

Informed
AI acts in lower-risk areas, such as switching carriers

Consulted
AI decides in most areas; people oversee the critical ones

Accountable
AI supports the decision; people own the result, such as a truck-to-air shift

Responsible
AI supports; people perform the task or make the decision



IDC PREDICTION

By 2028, A2000 manufacturers will shift **25%** of automation workloads from proprietary systems toward open, software-defined, and AI-powered digital twins leveraging comprehensive knowledge graphs.

20% of manufacturers claim scaled production use of AI agents

Sources: IDC FutureScape 2027 – Manufacturing and Supply Chain #7 (APJ) , IDC Perspective: In the Welter of AI, Should We Be Dusting off RACI? (IDC #US53658325, Jul 2025); IDC 2026 Manufacturing Survey, n(APJ)=694 manufacturers.

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Retail:

What holds back Scale?

Trust and security
Agent-identity and fraud standards

Agentic AI, Asia/Pacific consumers vs retailers, 2026

Theme	Agentic payments	Shopping agents	Data sharing
Consumers	3% prefer them	35% use AI chat for discovery	54% need transparency first
Retailers	37% see them as transformative	54% plan agentic or GenAI commerce solutions	22% cite privacy as a personalization challenge
Read	Divergent	Partial	Divergent

Note: most agentic commerce is at early maturity. Agents are brittle and need expert supervision.



IDC PREDICTION

By 2028, **60%** of A2000 retailers will restrict agent-initiated transactions, as gaps in agent identity, liability, and attribution standards make agents an unpriced risk, not a sales channel.

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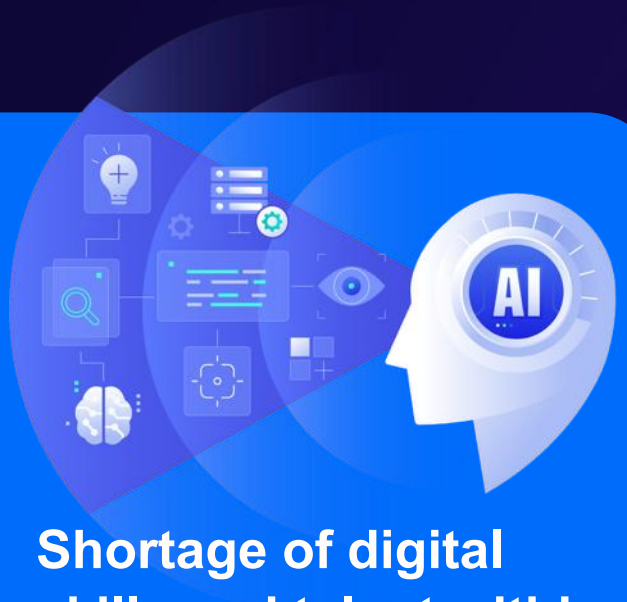
Sources: IDC FutureScape 2027 – Retail, Hospitality and Media #8 (APJ), IDC 2026 Worldwide Retail Consumer Insights Survey, n APJ=300, IDC 2026 Retail Technologies and Business Processes Trends Survey, n APJ = 180

Retail:

What holds back Scale?

People and skills
Agent-governance roles and teams

Top business challenge to executing an AI strategy



42% **Shortage of digital skills and talent within our organization**

The roles needed to oversee agents are the ones organizations already struggle to fill, so upskilling has to come before hiring.



IDC PREDICTION

By 2029, **45%** of APJ enterprises will hire more (not fewer) staff to manage cross-org agentic workflows, as missing audit and error-tracing standards make human reconciliation the only containment layer.

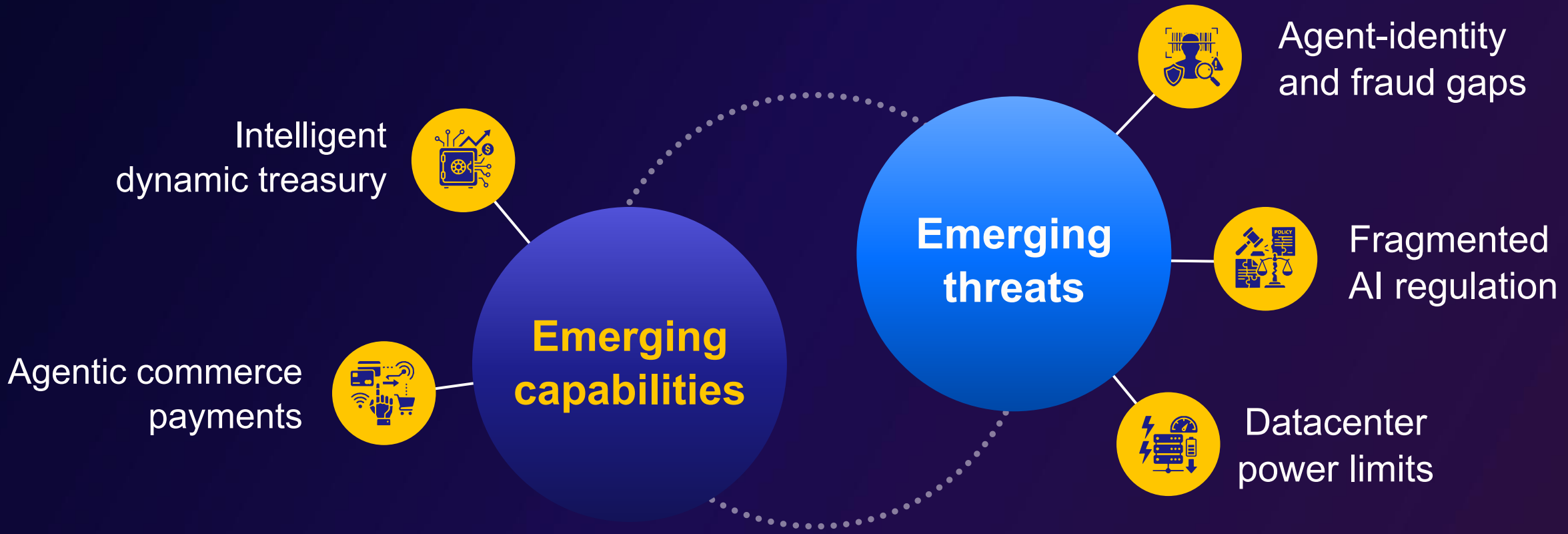
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Sources: IDC FutureScape 2027 – Retail, Hospitality and Media #5 (APJ), IDC 2026 Retail Technologies and Business Processes Trends Survey, n APJ = 180

What to act on NOW!

Which emerging capability or threat should leaders act on now?



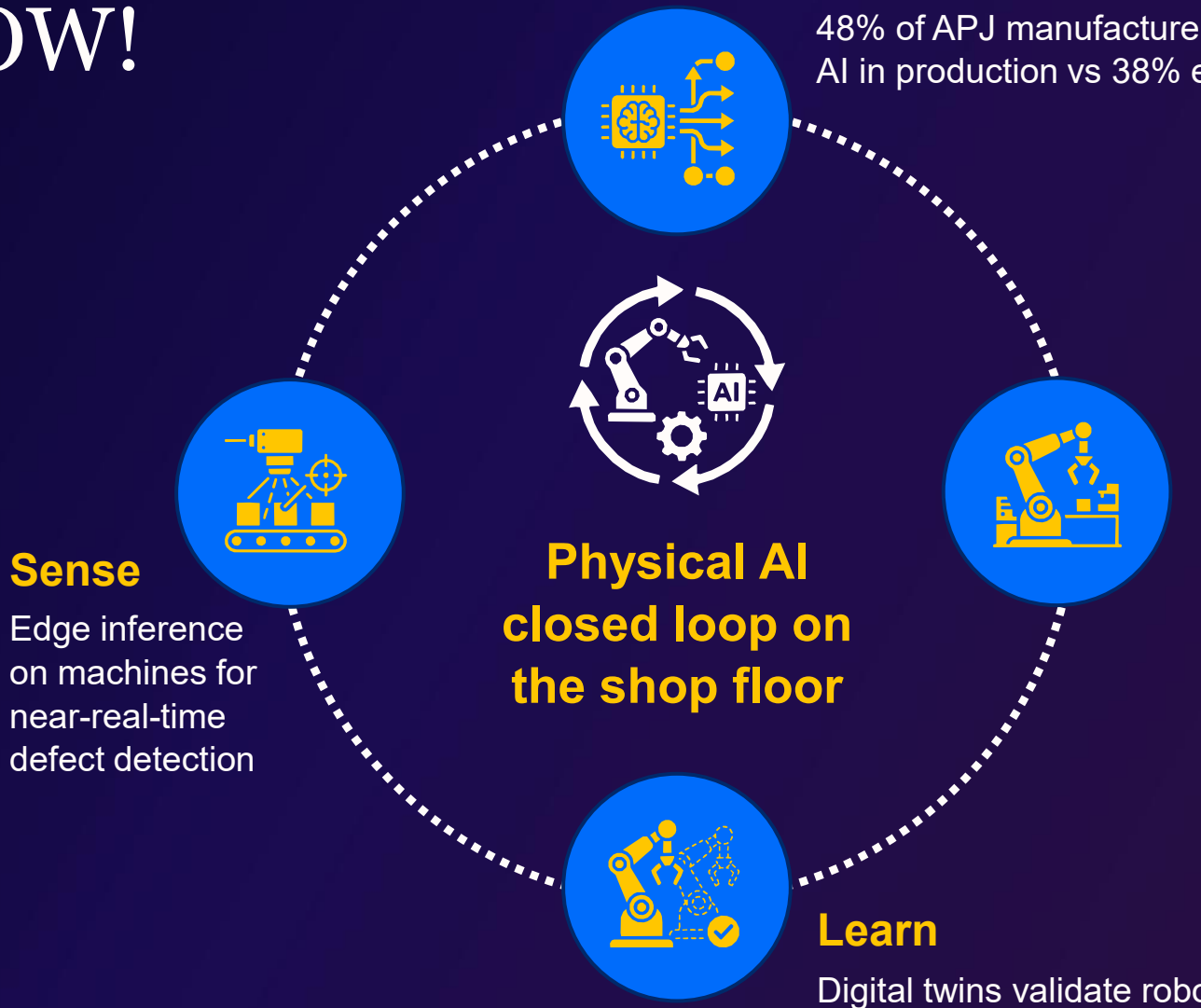
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Manufacturing and Supply Chain:

What to act on NOW!

IDC PREDICTION

By 2030, as agentic AI moves from advising to deciding, **75%** of large manufacturers will treat physical AI as the necessary execution layer, capturing a **25%** gain in process efficiency.



Decide

48% of APJ manufacturers run agentic AI in production vs 38% elsewhere

Act

59% of APJ manufacturers use robotics; 22% prioritize autonomous cells

Learn

Digital twins validate robot behavior before deployment

Sense

Edge inference on machines for near-real-time defect detection

Sources: IDC FutureScape 2027 – Manufacturing and Supply Chain #5 (APJ), IDC Worldwide Manufacturing Survey, Aug 2026, n=1,065 (APJ n=365)

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Financial Services in APJ:

What to act on NOW!



IDC PREDICTION

Driven by improvements in AI for both capital markets and payments, **40%** of large enterprises **in APJ** will implement intelligent dynamic treasury capabilities by 2030.

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Source: IDC FutureScape 2027 Financial Services #6 (APJ)

Public Sector:

What to act on NOW!

IDC PREDICTION

With the absence of an international trust protocol, **35%** of APJ public sector organizations running cross-border AI agents will implement binding verification and kill switch rules by 2030.

Top sovereign AI outcome, APJ public sector

44% More confidence in AI through transparency and explainability

01 **Kill switches**
Authority to stop an agent

02 **Binding verification**
Mandatory checks on agent actions

03 **Trust and governance**
Human oversight and accountability

04 **Sovereign AI**
Foundation: in-region data and control

Act now: put sovereignty and governance controls in place first

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Sources: IDC FutureScape 2027 – Government and Education #6 (APJ), IDC 2026 AI Business Trends Survey, n(APJ public sector) = 32.

Universal Connectivity:

What to act on NOW!



IDC PREDICTION

By 2029, **70%** of APJ enterprises adopting satellite and submarine connectivity will require native SD-WAN and security platform integration to both empower innovation and avoid vendor lock-in.

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Source: IDC FutureScape 2027 - Universal Connectivity Alters the World #6 (APJ)

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