IDC FutureScape

The Great Rewrite Winning in the Agentic Economy

IDC FutureScape 2027

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(Opening Keynote)



The Great Rewrite

PREDICTION

50% of enterprises will run a majority of business processes AI first by 2029, up from 9% in 2026.

The New Foundation

Accelerated compute
GPUs, custom silicon and fast networking.

AI factory
Purpose-built infrastructure that turns power and data into AI at scale.

The New Frontier

Intelligent devices
PCs, phones, vehicles and machines run models on-device in real time.

Physical AI: robots on the shopfloor
Frontline-intensive firms shift 50% of workforce-planning resources from recruiting to robot capacity.

The New Rules

Energy and power
Power is the binding limit on AI capacity.

Trust and sovereignty
Control over where data and models run.

Quantum-safe security
Today's encryption must be replaced before quantum can break it.

The New Economics

Subscription
Seats and licenses

Consumption
Usage and credits

Tokens
Metered intelligence

Outcomes
Pay per result

The New Work

Agents and digital workforce
Agents take on multi-step tasks end to end and are governed like headcount.

Roles and skills reinvented
People shift from doing tasks to directing, supervising and improving AI.

The New Enterprise

AI-native tech
Every system rebuilt with AI inside and trust built in.

AI-first processes
Workflows built around AI, not retrofitted.

AI-human blended workforce
People, agents and robots working as one team.

AI-augmented decisions
AI recommends and acts; people set direction.

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Source: IDC FutureScape 2027 - AI's Business Model Reinvention #1 (APJ)

AI Intensifies Competition

Five industries, five distances down the AI frontier, all live in Asia today

Industry	How far AI has pushed it	Real-world proof	The number
Financial services	**Automates at scale** ●●○	A fully-licensed bank: 1,500+ AI models, 370+ use cases, value proven against control groups.	**~$800M** AI value, 2025
Manufacturing	**Acts autonomously** ●●●	A phone maker's near lights-out plant builds 10M flagship phones a year.	**81%** of the line automated
Retail	**Advises, starting to act** ●○○	AI agents already pay for shoppers in China. Most are open to it there; far fewer in Australia.	**86% vs 40%** open to AI buying: China vs Australia
Transportation	**Acts autonomously** ●●●	A port terminal runs on robotic cranes, driverless vehicles and AI scheduling.	**2x+** crane productivity vs traditional docks
Healthcare / pharma	**Acts on narrow tasks** ●●○	An AI X-ray tool, WHO-recommended for autonomous TB screening, runs at 2,600+ sites.	**2,600+** screening sites, 67+ countries

●○○ advises ●●○ automates ●●● acts on its own

Vendor takeaway

Competition turns AI from optional to must-fund. The opportunity is the gap between each industry's leader and its pack. Sell leaders their next step, and everyone else a fast way to catch up.

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Source: IDC CxO Conversations 2026; Media Reports.

The Tech Leaders (in Buyer Organizations)

A tech leader is whoever owns AI value, cost and risk, whatever the title

Vendor takeaway
Sell to the tech leader's scorecard.

CAIO | CDO | CFO | CHRO | CIO | CISO | CMO | COO | CTO | **Exco**

What successful tech leaders do

1	**Lead the business, not the technology**	**AI strategy is now the board's top nonfinancial topic**, with 67% of CEOs reporting on AI strategy, adoption and impact regularly.
2	**Prove the value and own the economics**	**Most organizations still struggle to show consistent, measurable AI business value**. 45%+ say prioritizing use cases to business goals/KPIs is challenging, citing undefined baselines and no dedicated AI value office.
3	**Get the house in order before scaling in AI**	88% of AI PoCs never reach wide deployment, which IDC ties to low readiness in data, processes and IT infrastructure. **66% of APJ firms are in the two earliest AI stages.**
4	**Make trust a business capability**	**44% of organizations say the security limits of their data platforms are the top challenge to AI and agentic AI**; 39% name industry compliance rules.
5	**Invest in people and the operating model**	**AI/ML engineers are the hardest role for tech leaders to hire**: 24% name them, almost double the next-closest role.

How vendors help

- Co-write business cases with business owners. Sell outcomes, contribute to success metric achievements.
- Arrive with an industry baseline. Co-define success before the build. Give cost-per-outcome visibility and FinOps tooling.
- Test with a live workflow against a controlled group. Set a scale or stop threshold with business and tech owners.
- Provide proof: certifications, audit trails, agent identity and compliance packs.
- Bundle training, embedded engineers, managed services and role-redesign kits.

Source: IDC CEO Survey 2026 (APJ N = 143); IDC Future Enterprise Resiliency & Spending Survey, Jan 2026 (APJ N = 309); IDC-Lenovo CIO Playbook 2025 (APJ); IDC MaturityScape Benchmark: AI-Fueled Organization 2026 (APJ N = 790); IDC's "Trust Before Autonomy" presentation at IDC Directions Boston 2026 (IDC IT Data Management Quick Poll Q1, Feb 2026 - WW) ; IDC 2026 CIO Sentiment Survey, Part 1: "Role, Priorities, and Talent" US54616427 - WW

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Rewrite the Foundation

Where and with whom AI runs

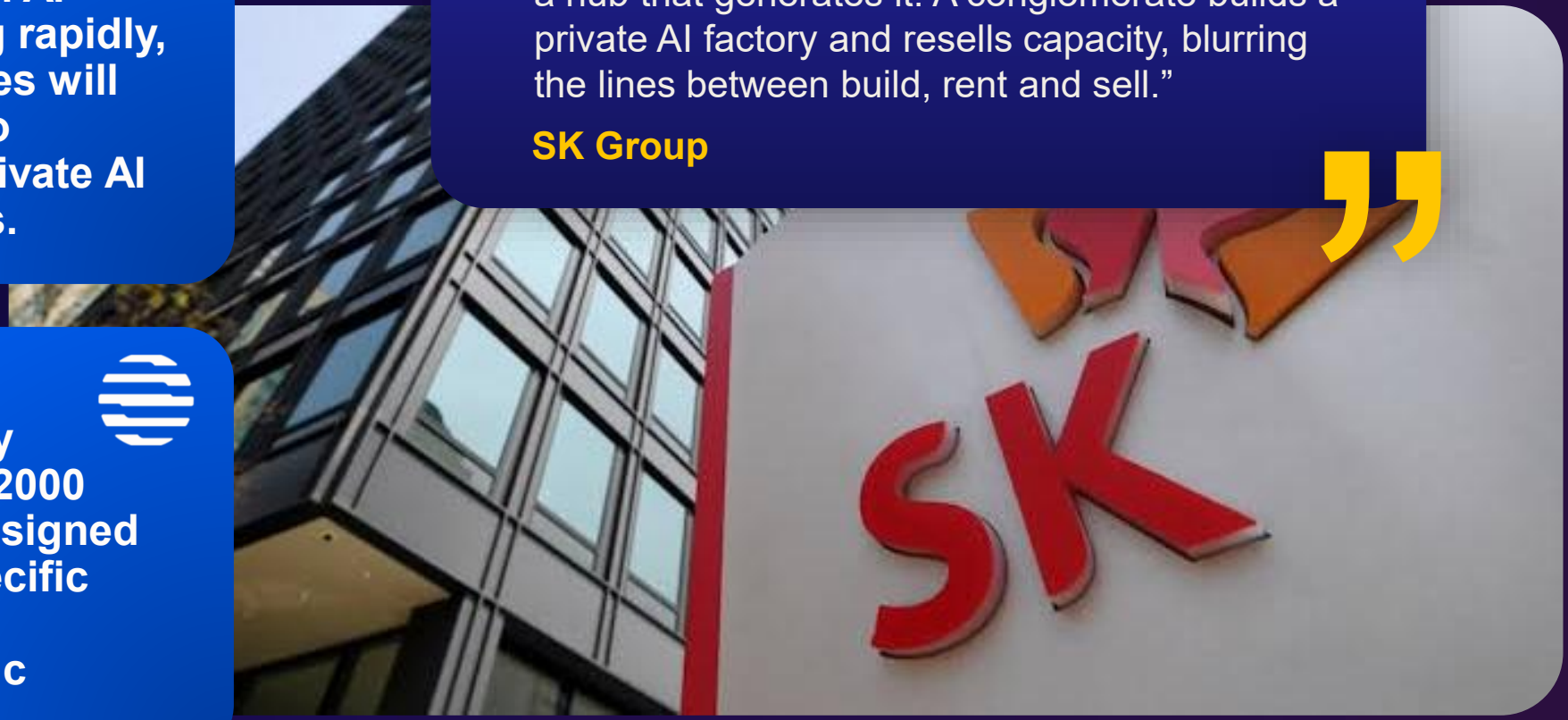
PREDICTION

With hyperscaler premium AI infrastructure costs rising rapidly, by 2030, 75% of enterprises will shift advanced services to specialized clouds and private AI factories to mitigate costs.

PREDICTION

With increasing regulatory nationalism, 50% of the A2000 will rely on AI factories designed to comply with nation-specific data standards, legal frameworks, and economic policies by 2030.

> "SK Group is building an AI factory for internal use, external provisioning (GPUaaS) and available to sovereign model developers under the Korea govt's Sovereign AI Foundations project. Chairman Chey Tae-won framed it as helping Korea move from consuming AI to being a hub that generates it. A conglomerate builds a private AI factory and resells capacity, blurring the lines between build, rent and sell."
>
> **SK Group**



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The Infrastructure Playbook

In AI-ready infrastructure, the winner isn't the biggest vendor. It's the easiest to connect.

	Play	What IDC predicts	What APAC buyers say	Your move: own a layer, plug into the rest
1	**Make hybrid consistent**	**Multicloud, portable, sovereign-ready firms will open a 3X resilience gap.**	**72%** run hybrid; 88% say AI needs it	Your layer works the same in every environment you support
2	**Write sovereignty into the contract**	**50% of large enterprises will write sovereign and regional rules into sourcing policy.**	**82%** say sovereign AI is a top strategy driver	In-country options for your layer
3	**Get data AI-ready**	**60% will fail to turn fast-growing data into measurable business value.**	**72%** say complexity delays AI from pilot to production	Your piece of the data path: storage, pipeline or access control
4	**Price on cost and energy per output**	**Scarce GPU, memory and power will push 70% of operators to whole-system planning.**	**82%** say AI infrastructure is the largest cost	Cost, power and delivery dates for your part
5	**Build governance into agentic ops**	**70% will run self-healing agentic IT ops; staff stay accountable without direct control.**	**53%** cite security as top concern with AI ops	Approval levels, action logs and undo for your automation

Vendor takeaway Buyers need a connected solution, not one supplier.

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Source: IDC FutureScape 2027 (APJ – Refer to Notes Page); IDC Digital Infrastructure Sentiment Survey 2026 (APJ = 307)

Rewrite the Frontier

Where AI acts - physical AI, robotics and on-device intelligence

PREDICTION

By 2028, 40% of enterprises operating physical AI fleets will run a closed-loop stack, pairing on-device inference with digital-twin simulation for training and a data pipeline for continuous learning.



- On device inference so the machine thinks where it works.
- Digital twin factories where it trains in simulation.
- Data pipeline. Real-world ops data flows back to the center for retraining, creating a closed loop.



- Physical AI collaboration between Fujitsu, FANUC, Yaskawa and Kawasaki Heavy Industries.
- 4 competitors, 1 platform as a common layer.
- Intended use to tackle labor shortages, aging workforce and a decline in skilled technicians.

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Source: IDC FutureScape 2027 - Devices Rebuilt for Native Intelligence & Physical AI #3 (APJ); CxO Conversations 2026

Rewrite the Rules

What they require – To scale agents only when they can prove who acted, under which policy, and whether the decision holds up

ASMPT's vision is to create a globally integrated, data-driven, and AI-enabled enterprise where technology is embedded into every business process, **every decision**, and every customer interaction.



PREDICTION

With the increasing demand for AI-driven analytics accountability, 50% of A2000 CFOs will have a KPI that measures decision integrity of AI agents by 2028.

PREDICTION

By 2029, 60% of A2000 enterprises will embed real-time, policy-as-code data governance, as data volume and velocity make committee-based review too slow for agentic AI.

For ASMPT, **cybersecurity as a business capability**, strengthening resilience, business continuity, and risk management.

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Source: IDC FutureScape 2027 - AI Economics and CFO Driven Value Creation #8; Data's Semantic Intelligence Era #1 (APJ); IDC FEa 2026

The Trust Playbook

Security is the budget buyers protect. Proof is what earns it.

	Play	What IDC predicts	What APAC buyers say		Your move: deliver your layer, connect to the rest
1	**Prove it, don't promise it**	**45% will require agent lineage: identity, data origin and decision trace.**	**47%**	require model transparency and auditability	Proof for your layer: resilience tests, model integrity, data origin
2	**Give every agent an identity**	**50% move to zero trust, verifying each agent before it acts.**	**36%**	need zero-trust access control	An identity for every agent and automated action in your product
3	**Make rule differences a setting**	**45% of A2000 run jurisdiction-specific AI model registries and controls.**	**44%**	face national AI compliance and reporting rules	Per-country settings for data location, consent and reporting
4	**Keep one security policy everywhere**	**75% of agentic edge users shift to policy-encoded runtime governance.**	**49%**	rank security and governance a top capability	Security policy that follows the workload to any environment, with no re-licensing
5	**Stand behind it in the contract**	**Firms holding vendors accountable for agent actions go to 55%.**	**52%**	say cyber and resiliency is the top AI budget factor	Clear terms for what you answer for when your AI acts

Vendor takeaway Security and compliance are the budgets buyers cut last, so trust wins deals.

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Source: IDC FutureScape 2027 (APJ – Refer to Notes Page); IDC Digital Infrastructure Sentiment Survey 2026 (APJ = 307)

Rewrite the Deals

How they fund, measure, and lock in or out contracts



The Future CEO

By 2028, 30% of A2000 companies will have reorganized around managing the economics of AI, creating a speed-based competitive advantage and putting the tech leader responsible on a CEO track.



The Future of CIO

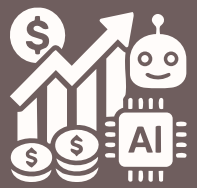
By 2029, 50% of A2000 CIOs will be measured on AI unit economics, making the CIO the executive who owns the accumulated value of AI rather than the cost center that runs it.



The Future of KPIs

As model, routing, and agent design shape AI outcome quality and cost, 40% of A2000 enterprises will add tiered outcome-quality and revenue-at-risk targets to technical team scorecards by 2028.

krungsri Consumer



The Future of AI Economics

By 2027, A2000 CFOs and CIOs will shift 35% of new AI spending from pilot-justified initiatives to pre-deployment cost and business outcome baselined releases.



The Future of T&Cs.

CIOs that fail to build portability and exit clauses into AI platform contracts by 2028 will face 35% higher AI switching costs as provider concentration hardens data and workflow lock-in.

The deal is no longer closed at signature. It is open for scrutiny.

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Source: IDC FutureScape 2027 – Reimagined Technology Leader in the AI Era #1, #2; AI's Business Model Reinvention #6; AI Economics and CFO Driven Value Creation #4; Becoming an autonomous enterprise #8; IDC FEa 2026

The AI Economics Playbook

A cost model that counts only inference misses 30–60% of the real bill.

Cost category	CFO consideration	Put this in the deal
Inference costs	Biggest variable cost; swings with volume	Per-call price, batch discount, monthly cap
Retrieval and embeddings	Often overlooked; grows with knowledge base size	Storage and search priced separately
Tool execution	API charges can sit outside AI budgets	Third-party charges itemized at cost
Orchestration infrastructure	Capitalized or expensed, build versus buy	Runtime fee on its own line
Observability and monitoring	Often underbudgeted	Cost reporting included and exportable
Human-in-the-loop	**Largest single cost at scale**	Review time priced per task
Development and maintenance	Capitalization depends on internal-use software policy	Version pinning; notice of price changes

37%
rank usage cost a top-3* factor when choosing a model

53%
mix in-house and partner skills to build agents

54%
prefer one or two vendors for agent orchestration

Vendor takeaway Buyers sign on trust and find the bill later. Show the full bill first, and you keep the customer.

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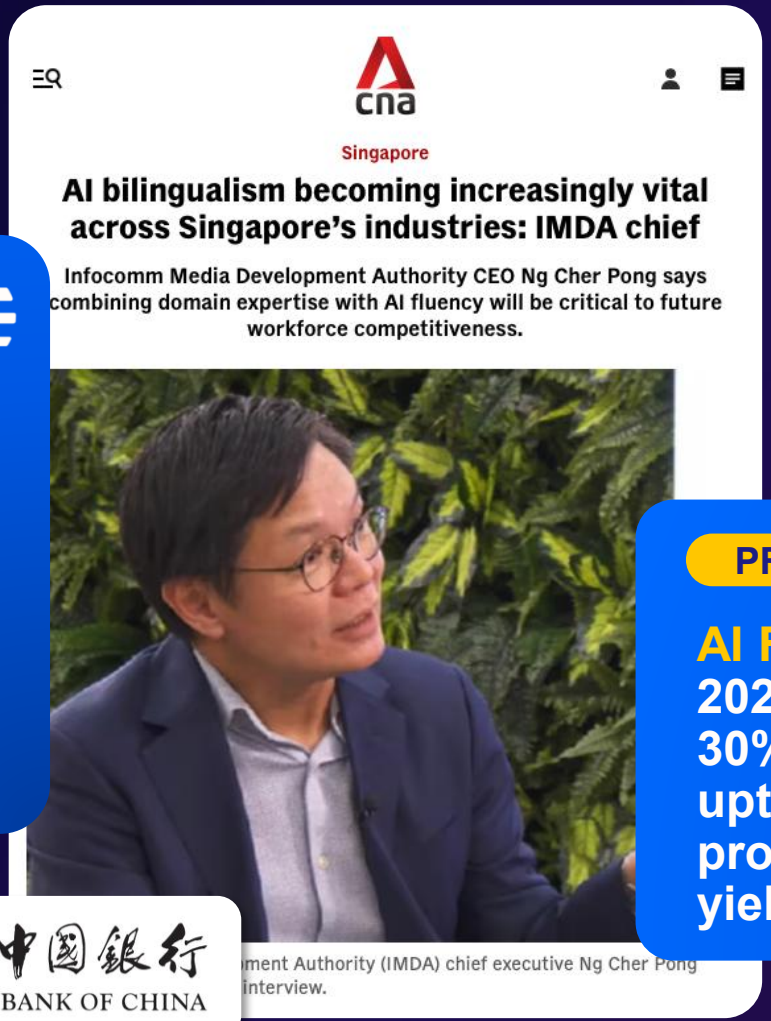
Source: IDC Perspective #US54644126 (Jun 2026); IDC Global AI Tech Buyer Survey 2026 (APJ N = 758) – Top 1, 2 or 3 combined); IDC Agentic AI Platforms Survey 2026 (APJ N = 150)

Rewrite the Work

Agents get names and roles. People review, stay accountable and run AI at scale.

PREDICTION

Enterprises that have not invested in AI talent development and governance by 2029 will see 50% lower revenue growth than peers who make these investments.



PREDICTION

Humanizing Agentic Employees. As demand for human-centric AI grows, 60% of A2000 organizations will deploy named, role-based AI agents by 2028, achieving 35% higher user adoption than generic bots.

PREDICTION

AI Factory Operational Management. By 2029, A2000 infra organizations will shift 30% of ops staffing budget from uptime/patching to factory-modeled production engineering: capacity planners, yield engineers, and reliability engineers.

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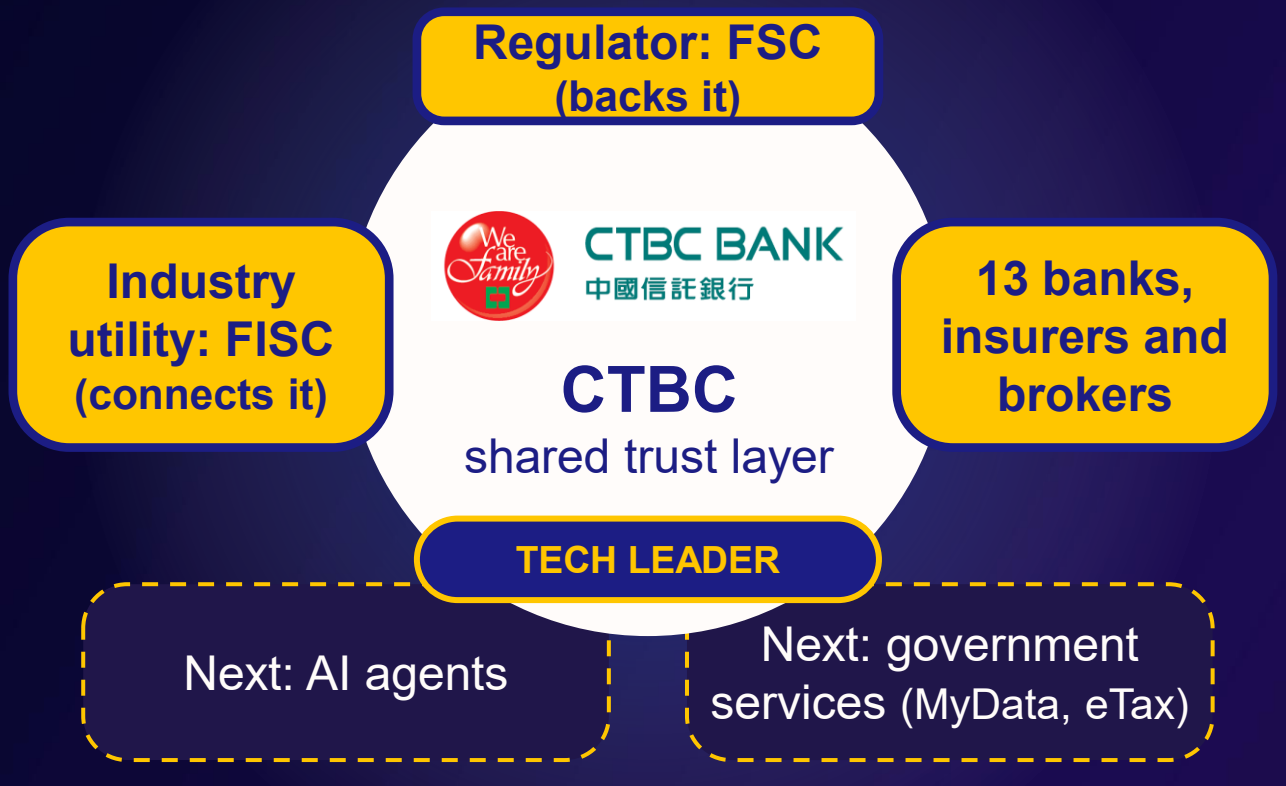
Source: IDC FutureScape 2027 - Human-Agent Workforce Strategy #2, #4; Reimagined Technology Leader in the AI Era #6 (APJ); IDC FEa 2026 and Media

The Rewrite Has Already Started

Tech (buyer) leaders aren't waiting. They are building the "new" enterprise.



13
institutions on one trust standard

65,000+
verifications at 95.8% success

<5%
of legacy cost per verification

The five rewrites, already underway at one tech leader.

Foundation Where AI runs
7,800 ATMs and the app rebuilt to serve other banks' traffic.

Frontier Where AI acts
ATMs as a 24/7 trust point. A trust layer for AI agents is next.

Rules What buyers require
One shared trust standard across 13 institutions, FIDO certified.

Deals How they pay
A fee per verification. Cost cut from US$5–8 to under US$1.

Work How work gets done
New API and partner teams. A platform unit with its own P&L is next.



Vendor takeaway

The early movers aren't waiting. They write the standards their industry follows, and the RFIs that come with them. They are your super customers.

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