IDC FutureScape

The Great Rewrite

Winning in the Agentic Economy

A Tech Vendor Playbook for 2027



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

The Buyer is Rewriting, are You?

The shift

The buyer is rewriting based on its new benchmark

1	2	3	4	5
The New Foundation	**The New Frontier**	**The New Rules**	**The New Economics**	**The New Work**
Where AI will run. Across their own data centers, public cloud and private AI factories in their country. **Needs**: GPUs, fast networking, AI-ready storage, power and cooling, and one way to manage every environment.	**Where AI will act**. On machines, sensors and sites: factories, ports, vehicles. **Needs**: AI that runs on the device, a digital copy of the site for safe testing, and a data loop that sends what machines learn back for retraining.	**What buyers will require**. Proof before AI acts on its own. **Needs**: An identity for every AI agent, a record of every action, access limited to what each agent needs, data kept in-country, every model registered.	**How they will pay and measure**. In steps, against results, with the full cost and a way out. **Needs**: Usage and cost metering by workload, results measured against today's numbers, and open formats so data and workloads can move.	**Who will do the work**. AI agents doing tasks, with people building and supervising them. **Needs**: An agent platform with low-code builders, human review and approval steps, monitoring of what agents do, and access by role.

Are you rewriting too?

Ask for the workload map first. Where does each workload run today, and where next? Show where your product runs, and bring a tested design.	**List accounts with plants, sites or fleets**. Bring pre-sales specialists. Show how your product connects to devices, and what happens if the network drops.	**Carry a one-page answer per country**. Where data is stored, what is recorded, who is accountable. Show the audit record live in the demo, and give it to security, risk and legal early.	**Propose in steps**. Show the cost meter and how their data can leave. Run a small live trial with the go result and the stop result agreed up front.	**Sell to the people who will run it**. Demo the review queue and the monitoring. Train their builders and supervisors, and coach your sellers to talk results, not features.



Vendor takeaway To rewrite, you will need insight to see it, data to benchmark it, and go-to-market content to prove it.

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The Rewrite, Market by Market



APJ AI Spending in 2027

China
46%

Japan
42%

Korea
50%

Hong Kong
48%

Australia
19%

Singapore
59%

India
49%

Rest of Asia/Pacific
39%

- 2027 in US$M
- 2027 YoY

What buyers weigh when choosing AI: % naming it a top-3 criterion.

Market	Security	Integration with current systems	Model accuracy	Customization	Local rules	Run cost	Enterprise scale	LEAD WITH
China	52%	38%	36%	22%	30%	27%	31%	Security, then integration with current systems.
Japan	54%	36%	44%	30%	17%	30%	14%	Security, then model accuracy and reliability.
Korea	35%	34%	32%	38%	26%	28%	23%	Customization, then security and integration.
HK/Taiwan	44%	30%	43%	36%	35%	16%	19%	Security, then accuracy.
ANZ	48%	52%	33%	20%	31%	20%	27%	Integration with current systems, then security.
ASEAN	56%	42%	42%	28%	27%	18%	15%	Security, then integration with current systems and model accuracy.
India	54%	63%	46%	13%	26%	13%	19%	Integration with current systems, then security.

Vendor takeaway Seven markets, One rewrite, Seven ways in.

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Source: IDC Worldwide AI and Generative AI Spending Guide - Forecast 2026 | Aug (V2 2026); IDC Global AI Tech Buyer Survey 2026 (APJ N = 758) – Top 3 all included

The Rewrite, Buyer Persona by Persona

THE BUYER	THEY WILL ASK	WHAT CONVINCES THEM TO BUY OR INVEST	
 **CEO or board and CAIO**	*"What does this do for growth, and how soon?"*	• The result in their own numbers • A peer company that has done it	• A plan with a date and a named owner • A cap on what is at risk if it fails
 **CFO**	*"What is the whole cost, and when can we stop?"*	• Payback period and cost per outcome • The whole cost: run, people, third parties	• Results agreed in writing before the build • Exit terms, and how data leaves
 **CIO**	*"Does it work with what we run, and who runs it?"*	• A picture of what runs where • Fit with what they run today	• Named local partners who run it • A migration plan and support by country
 **CTO**	*"Can our systems and AI agents connect to yours?"*	• Technical connection guide • A live demo of an AI agent using it	• What it needs to scale • Customers with a similar architecture
 **CISO/CRO**	*"Who did what, under which rules, in my country?"*	• Per country: data location, logging, accountability • The audit record, live	• Certifications and test results • Who answers when AI acts
 **COO**	*"Will it keep the operation safe and running?"*	• Uptime and safety results from a similar site • Who supports it on site, and how fast	• A first trial on one line or site • Training for the people on the floor
 **CMO**	*"Can I see results in weeks, not quarters?"*	• Results in weeks on their numbers • Before-and-after from another marketing team	• How it handles customer data and privacy • What changes for their team and agencies
 **CHRO**	*"What happens to our people?"*	• A training plan and time to skill • How roles changed at similar companies	• How people stay in control of AI decisions • A plan for people whose work changes

Vendor takeaway Bring in the solution with the evidence to earn Yes(es) from all (decision making) personas.

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