

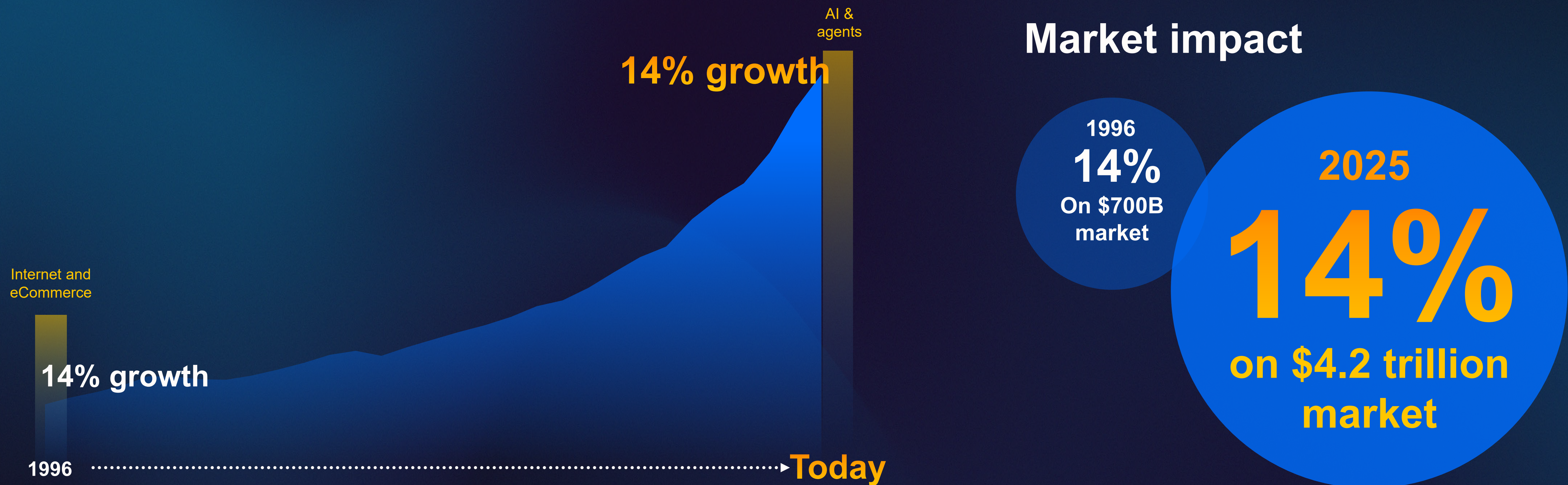


Scaling AI for the Agentic Future: Closing the Enterprise Gaps

Meredith Whalen

Chief Product, Research and Data Intelligence Officer, IDC

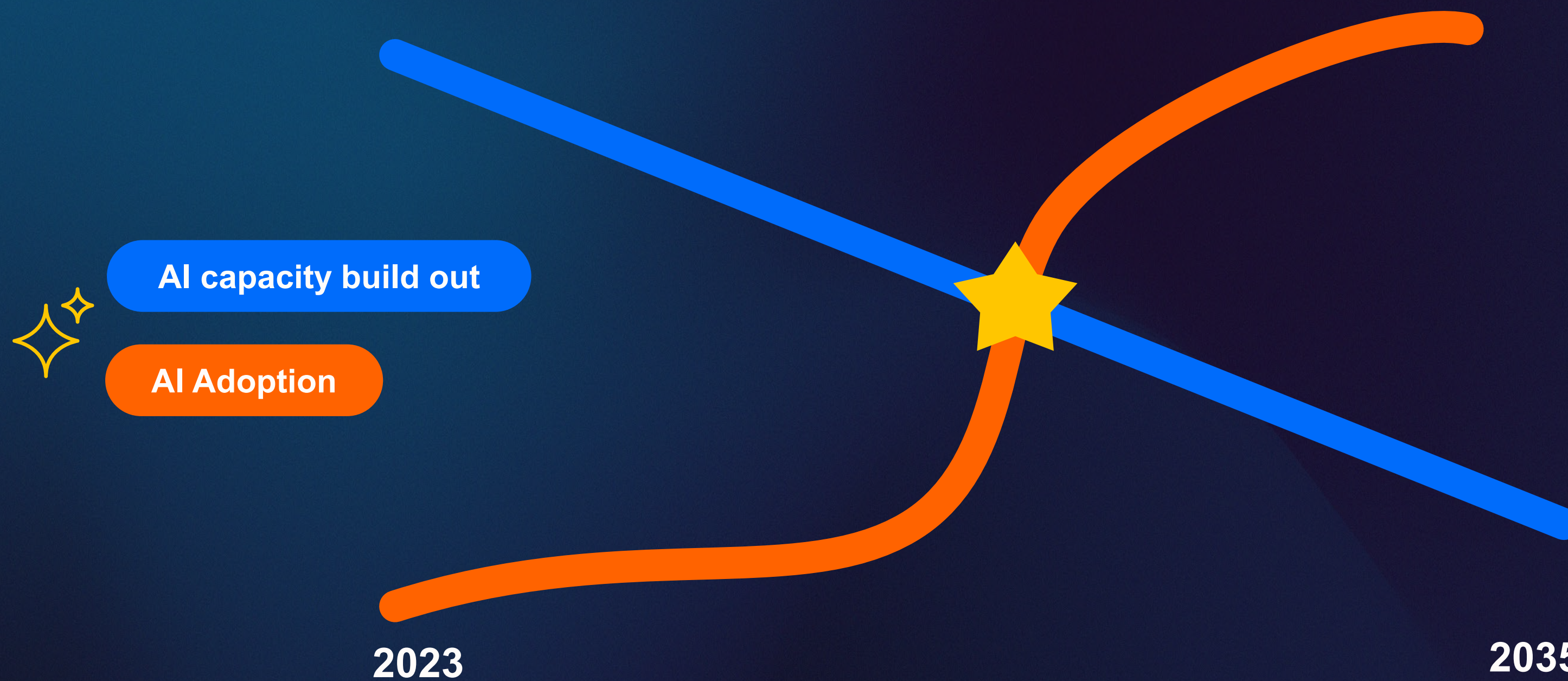
Strongest **IT spend** since 1996



Source: IDC Worldwide Black Book 31-March-2026, Forecast



The **AI supercycle**: Build out => adoption



Source: IDC

Market impact

- **Supply:** When is infrastructure ready for inference at scale?
- **Demand:** When do enterprises go from experimentation to production?



Leading within the **AI** supercycle?

AI Supercycle Readiness

- When AI infrastructure is ready for inference at scale
- When enterprises move from experimentation to production



Preparing for 1 billion agents

- Types of agents you will deploy
- Managing thousands of agents in your enterprise

Moving from experimentation to production

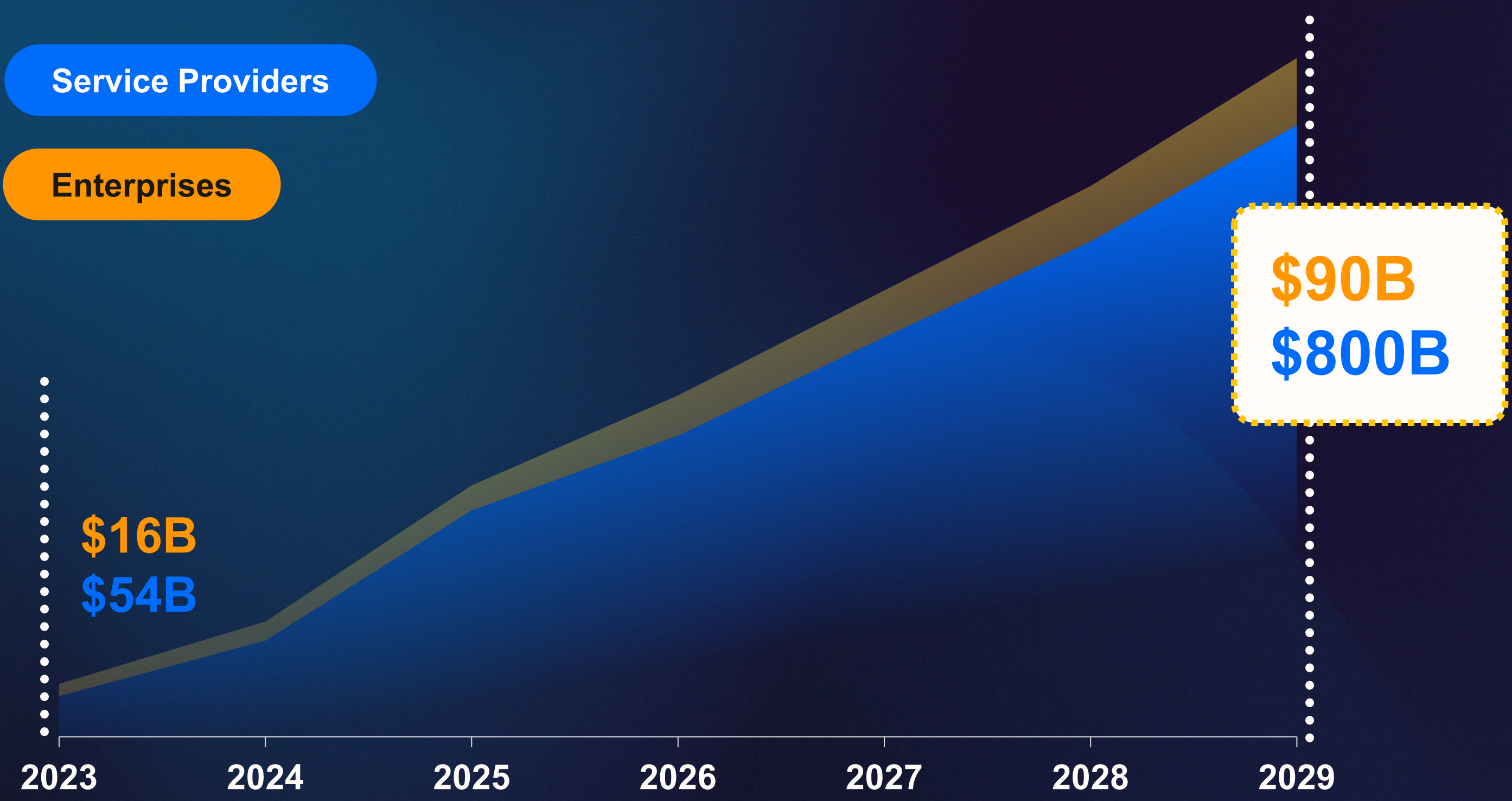
- Unblocking execution barriers
- Leading your organizations through transformation



The **AI Supercycle** Inflection



\$1+T in AI infrastructure spending in 2030



Market impact

- 15x** growth in service provider spend
- 2029** inference tipping point
- 5x** growth in enterprise spend

Source: IDC Quarterly Artificial Intelligence Infrastructure Tracker, 2026



Enterprises spend **\$400B** in 2026 on AI platform and services



Market impact

\$1T in enterprise spend in 2029

Leading industries

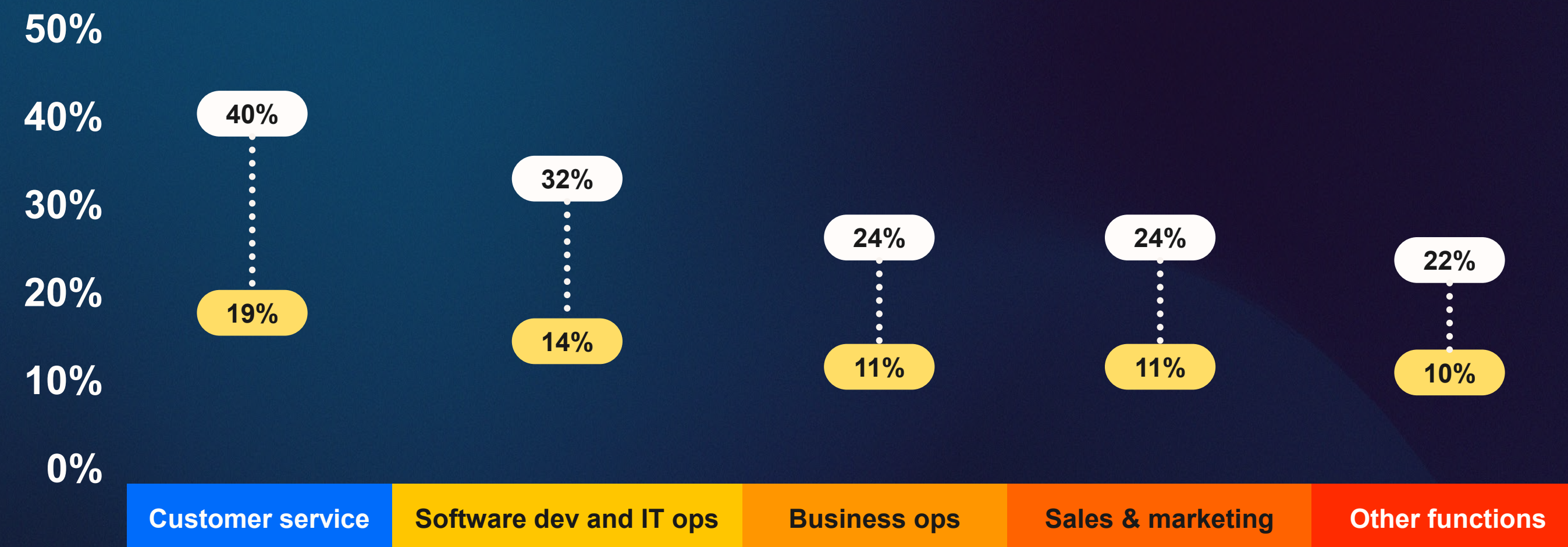
- ICT – both builders and buyers
- Banking – automation at scale
- Retail – core is operational

Source: IDC Worldwide AI and Generative AI Spending Guide - Forecast 2026 | Mar (V1 2026)



We are still in **early-stages**

U.S. AI tech investments-to-labor ratio by business function **2026** **2029**



Market impact

Leading functions

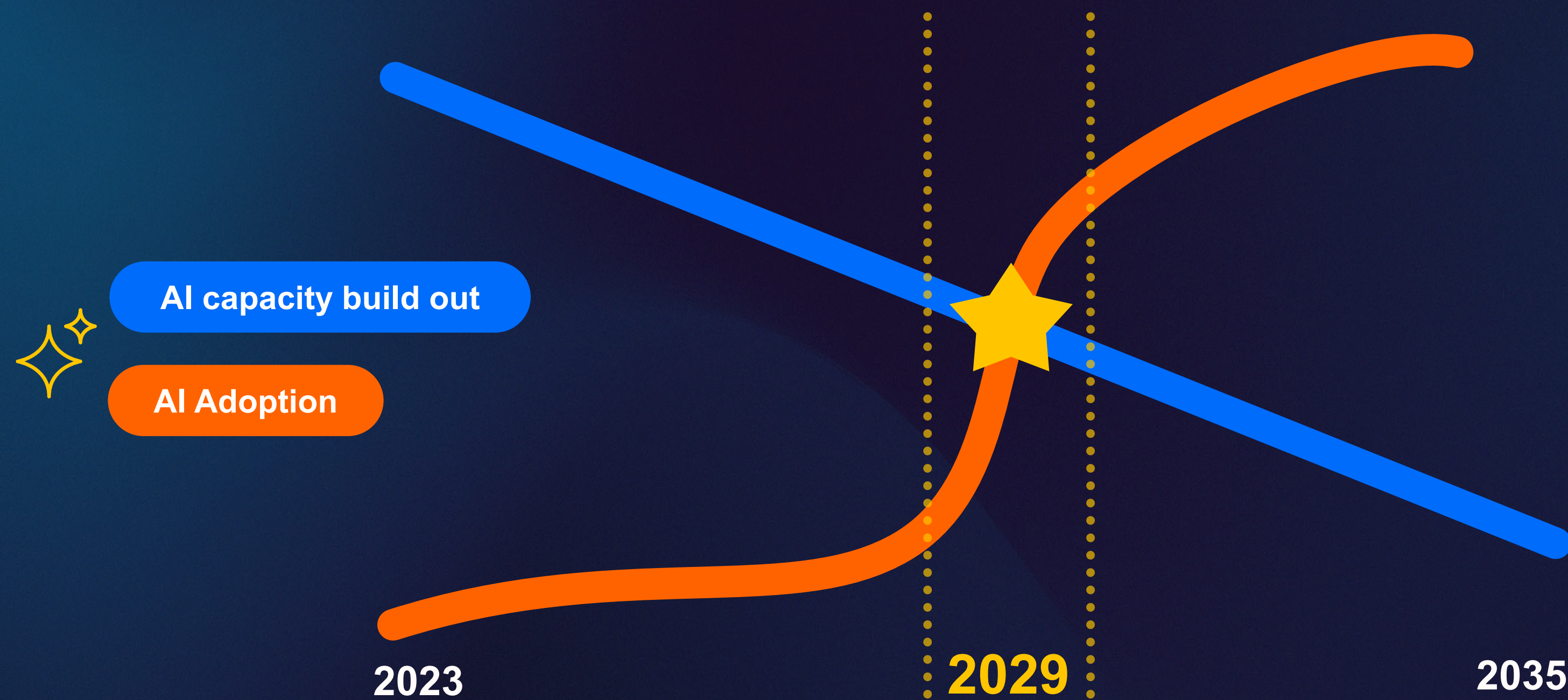
- Customer service
- Software development and IT operations

2029 Most functions in production

Sources: IDC Worldwide AI and Generative AI Spending Guide - Forecast 2026 | Mar (V1 2026) and U.S. Bureau of Labor Statistics. IDC Analysis



The **AI supercycle**: Build out => adoption



Source: IDC



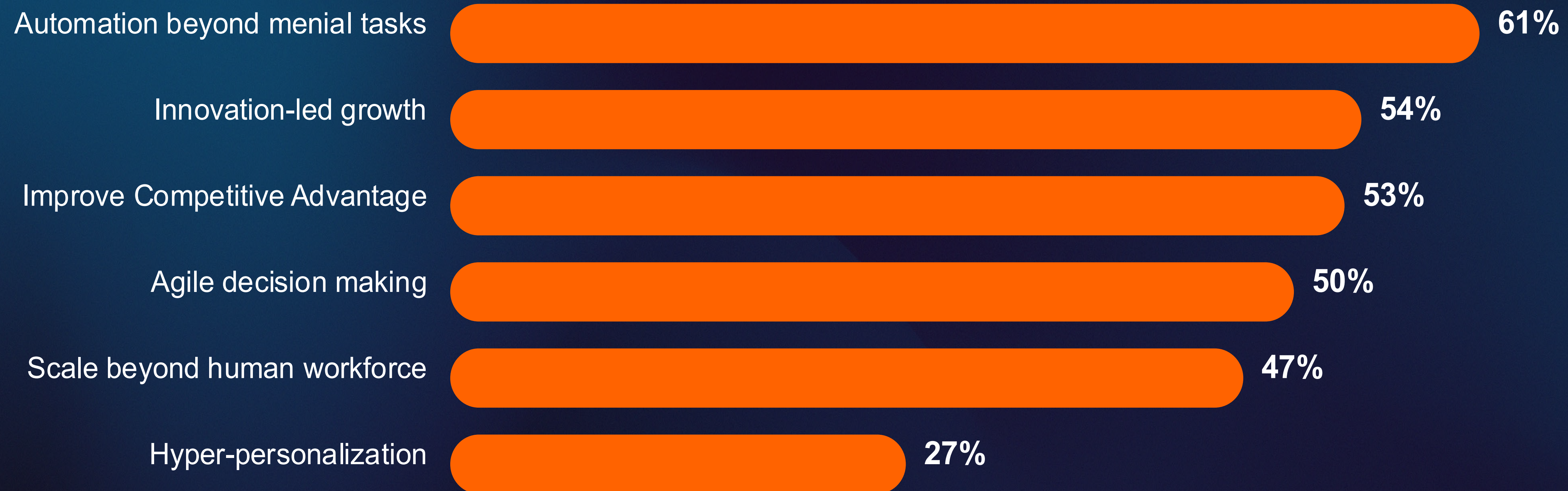
1 billion AI agents worldwide by 2029

Source: Agent Economics Adoption and Delivery model, IDC, December 2025



AI Agents shift **strategic priorities**

GenAI changes how organizations create. Agentic AI changes how they act.



Source: AI use case study, IDC, Jan 2026 n= 975



40,000 employees and 25,000 agents



Bob Sternfels
Global managing partner of
McKinsey & Company

“
"Our model has always been synonymous that growth only occurs with total head count growth.
Now it's actually splitting. We can grow in this part, the client-facing side, and we can shrink in this part and have aggregate growth in total.
That's a new paradigm and a new dynamic."
”



In the future, **custom configured and standalone agents** will dominate



Source: Agent Economics Adoption and Delivery model, IDC, December 2025 | TeraTokens = 1,000,000,000,000 tokens/calls



New operating model with **agents as apps**



Market impact

2031 Agents become the application

Advice

- ➔ **Evaluate app portfolio:** agents trigger rationalize and modernization
- ➔ **Evaluate architecture:** multiagent systems, centralized orchestration, open frameworks
- ➔ **Evaluation Criteria:** outcomes, interoperability, transparency

Source: IDC Document #US53884225 Tech Sector Transformation Series: The Agentic Evolution of Enterprise Applications, 2025



How to manage **thousands** of agents



Suresh Kumar
Chief Technology Officer and
Chief Development Officer

“I believe in the power of agentic AI to transform industries. We’ve been building agents—fast—for every aspect of the business.”



Customer shopping agent



Associate agent



Partner agent



Developer agent

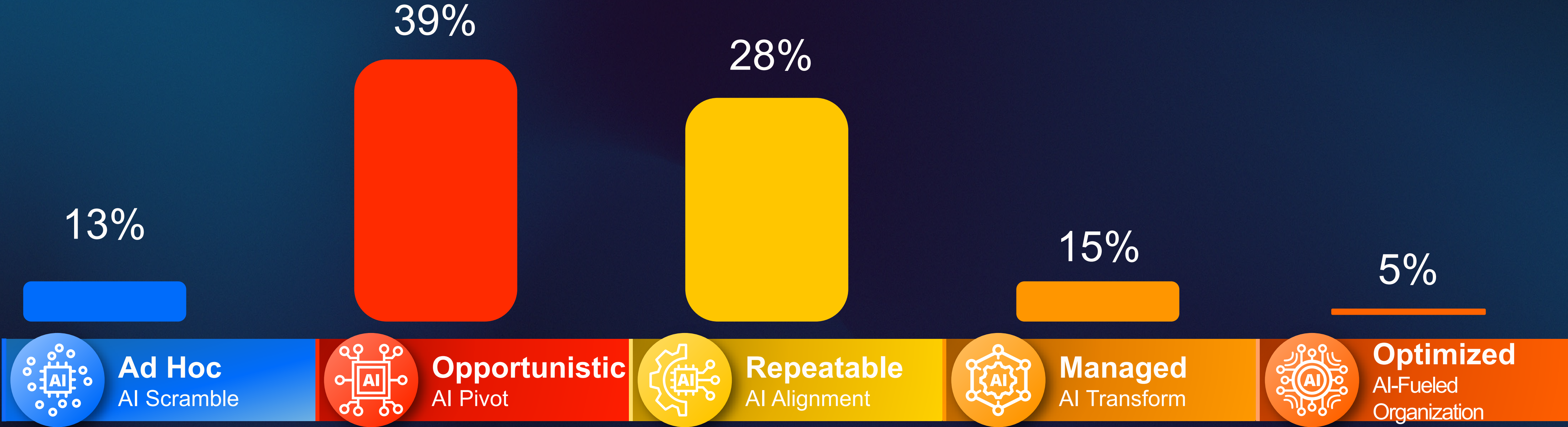


You have the mandate.
Execution is where it breaks down



Organizations are in the **AI pivot**

IDC Worldwide AI Fueled Organization Maturity Model Benchmark 2.0, 2026



Source: IDC MaturityScape Benchmark: The AI-Fueled Organization 2.0, April 2026 – n=337 U.S. organizations. Preliminary results

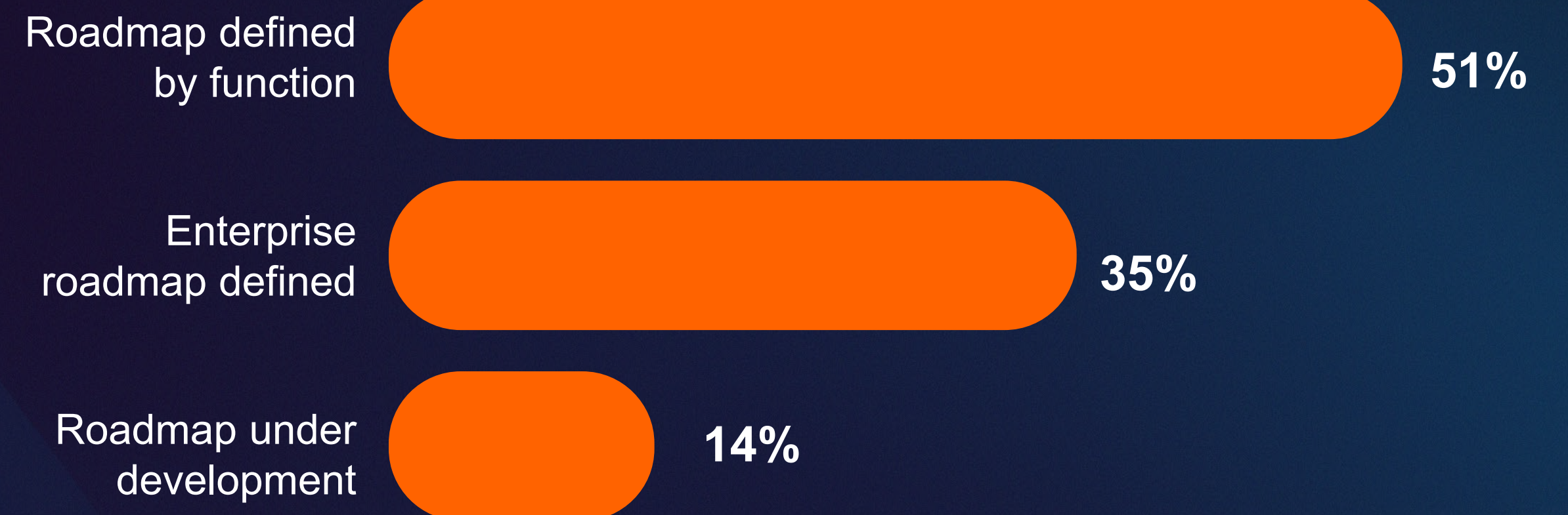


Unify **islands of AI innovation**

42% of CEOs plan to hire a **Chief AI Officer** in next 12 months

Source: 2026 CEO survey, IDC, March 2026. n=492

Status of enterprise AI roadmap

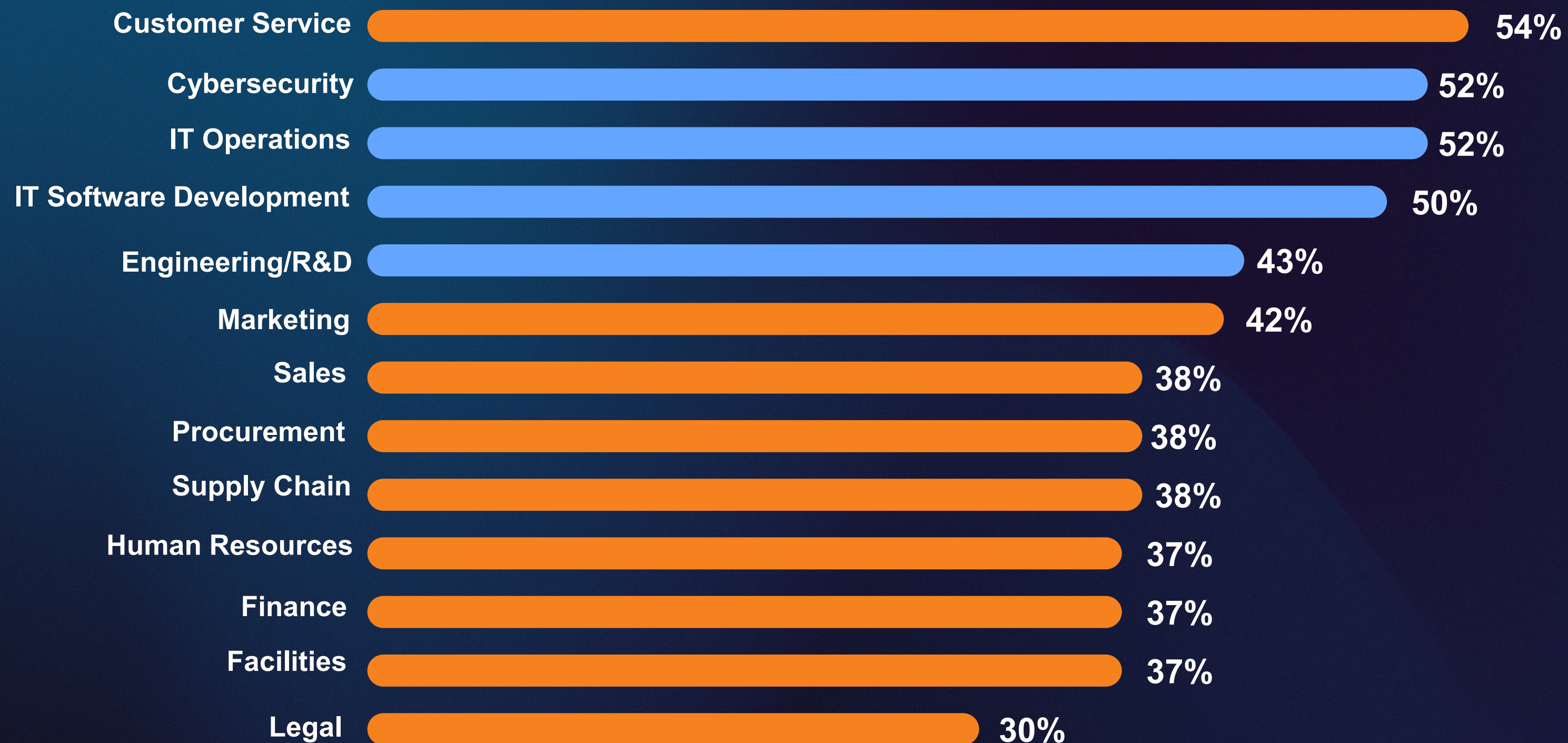


Source: AI Leaders View Of Functional Agentic Initiatives, IDC. March 2026.



Agentify existing **business processes**

Percent of AI Agents used widely in production by function



Advice



Work Redesign

Redesign workflows and define where AI replaces or augments human work before deploying



Repeatable Deployment

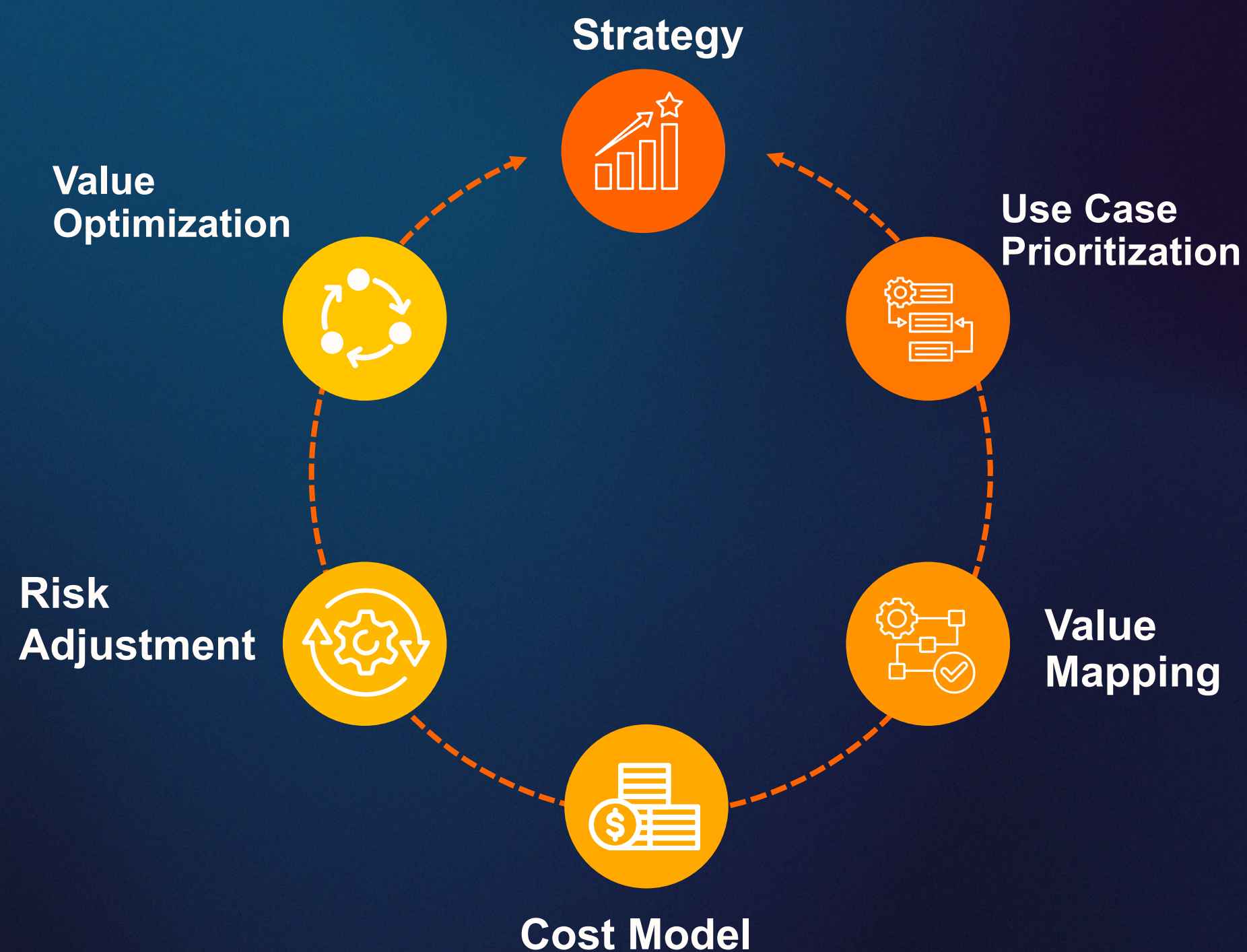
Standardize pre-built workflows and pre-integrated architectures so scaling doesn't mean starting from scratch

Source: AI Leaders View Of Functional Agentic Initiatives, IDC. March 2026. Q: What is the current status of AI Agent implementations in each of these functional areas? n=984



Agentic ROI is a discipline, not a calculation

IDC Agentic AI Business Value Maximization Framework



Define outcomes before you deploy

Attach a business metric (speed, cost, revenue, error rate) before code is written



Build a dynamic TCO model

Licensing is the smallest part. Inference at scale, oversight, rework and iteration are the costs most business cases miss



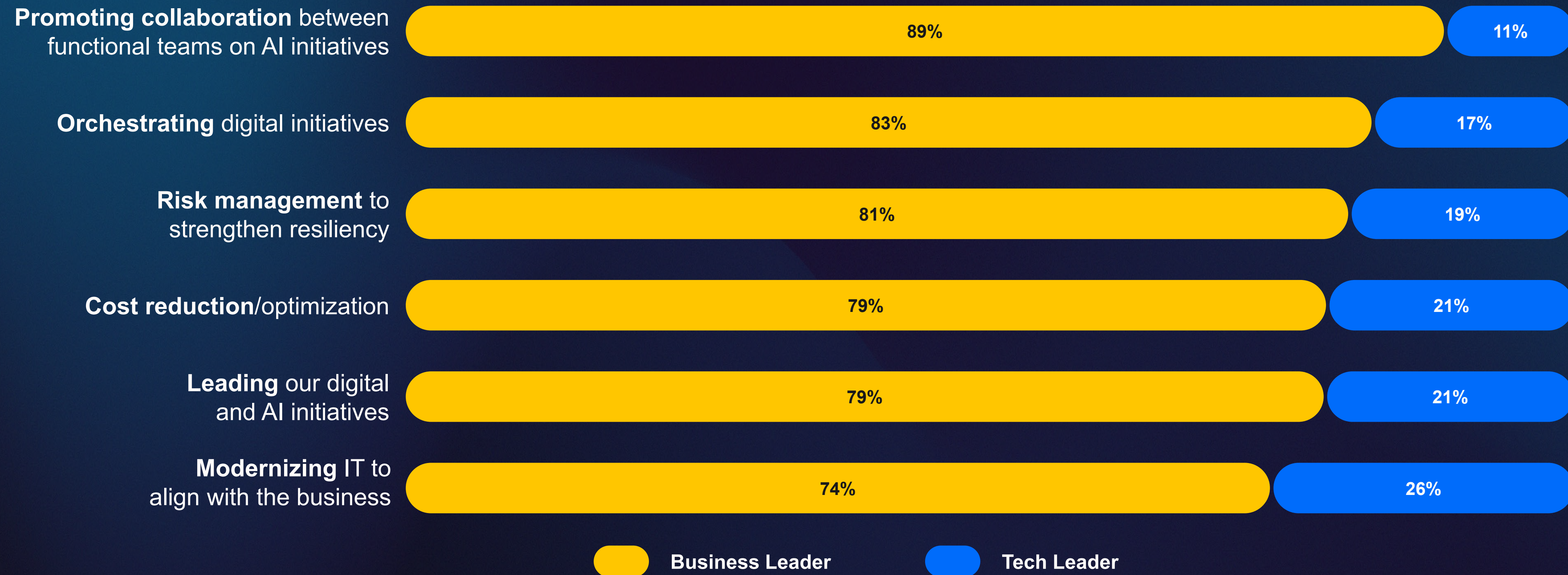
Create a measurement cadence, not a moment

Agents improve over time. A continuous governance rhythm lets you see value build and course-correct before the next budget cycle



What role will you play in the **AI Enterprise**?

How tech and business leaders see the CIO's role



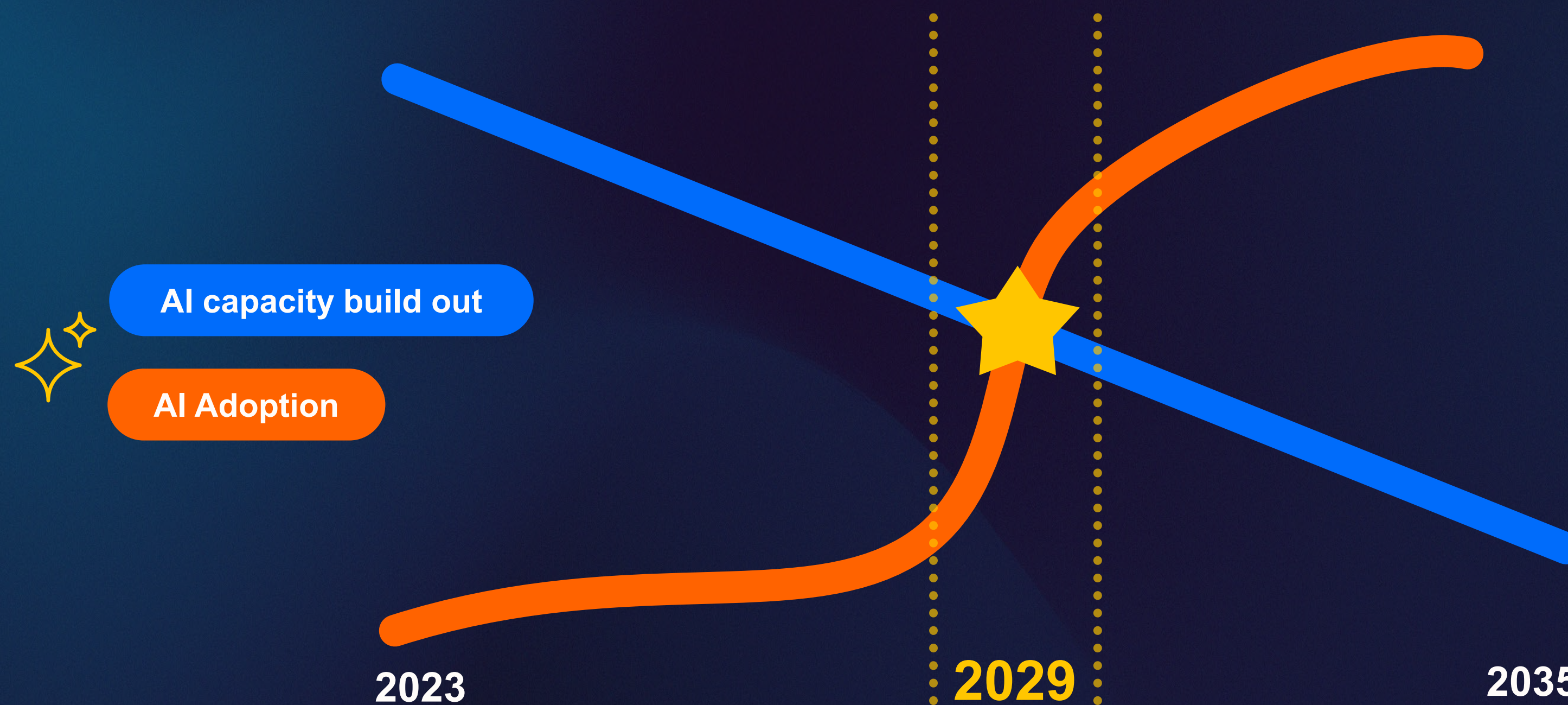
IDC C-Suite Tech Study, 2025. September, 2025. n=914. Q: Which statement best represents the CIOs primary focus in your organization today



Collaboration is critical to successful execution



The **AI supercycle**: Execution depends on **you!**



Source: IDC

