# Agentic AI at Scale

## Accelerating Innovation while Managing Risk



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2026

# Agenda

**01** Trends in Agentic Adoption

**02** Connecting Context to Construct

**03** Focus on the Decision Space

**04** A Framework for Managing Costs

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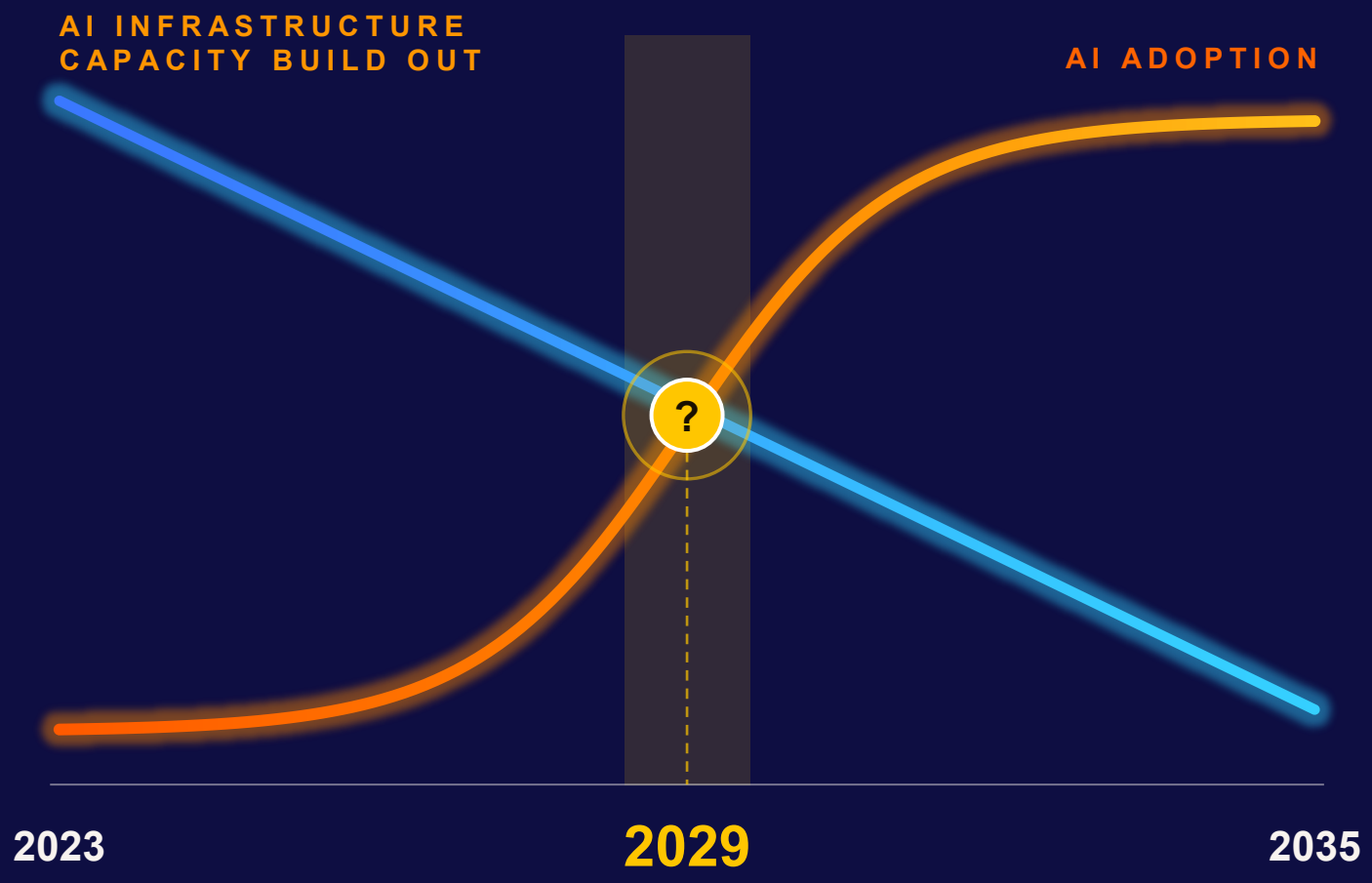
# The AI supercycle: AI is short of capacity, not demand




**AI DEMAND GROWS**

| | |
|---|---|
| 95% | of enterprises run AI agents |
| 2.5B | agents by 2030 |
| 72% | exceeded their agent budgets in the past 12 months |

**JEVONS' PARADOX**

| | |
|---|---|
| ↓95% | cost per agent action |
| 31% | shifted workloads to open-weight models |
| ↑487× | total token delivery costs |

**THE CONSTRAINT IS CAPACITY**

| | |
|---|---|
| 7 GW | of planned datacenter capacity delayed due to lack of power |
| 2028 | memory, power and packaging shortages |

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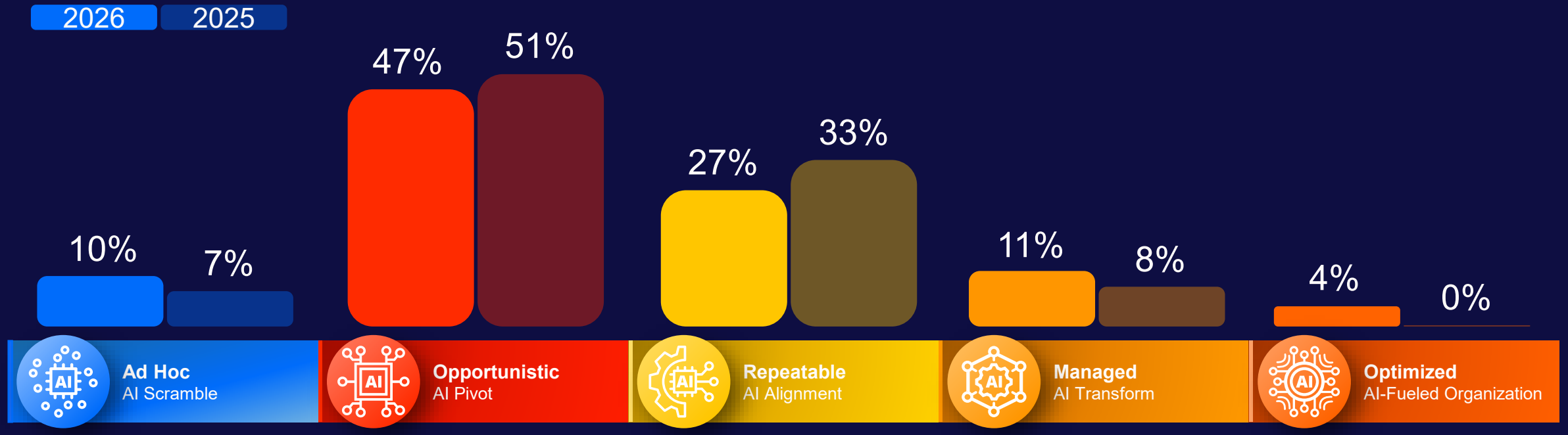
# Organizations are in the AI pivot

IDC Worldwide AI Fueled Organization Maturity Model Benchmark 2.0, 2026 – Advanced Countries View




*Source: IDC MaturityScape Benchmark: The AI-Fueled Organization 2.0, May 2026 – n=1,900 organizations across the globe*

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# Where CEOs say AI has already paid off

## Where AI has Delivered

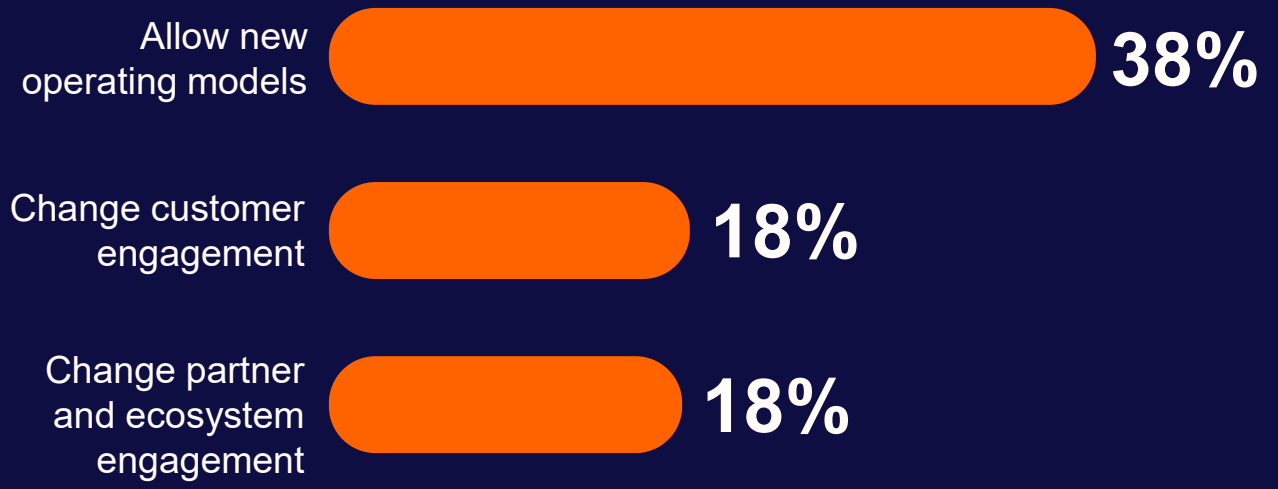
**34.8%** — Operational Efficiency

**31.6%** — Employee Productivity

**66%** of CEOs cite efficiency or productivity wins

## What's Next for AI?

**Most important way that AI will reinvent the business model in 3-5 years**




Source: IDC Worldwide CEO Survey, n=492, March 2026

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# A gap forming between the business (CEO) and technology operations

## What the CEO and the line-of-business expect

Transform the business model with AI

Deliver growth now, the #1 CEO priority

Scale agentic AI within 1 to 2 years

**The AI expectation gap**

### Business Value

**Under 45%**
of recent AI projects delivered measurable business outcomes

### Pace & Budget

**1 in 3**
now optimize existing AI projects rather than launch new ones

### Trust

**8%**
of organizations let AI agents run with full autonomy today

*Source: IDC Worldwide CEO Survey 2026; IDC AI-Fueled Organization MaturityScape 2.0; IDC Early Adopter Agentic AI Use Case Study, 2026.*

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# Three keys to successful agent deployment.

Context

Orchestration

Decisioning




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# Connecting Context to Construct




Knowledge Repository

Content

Vector Stores

Performance Records

Tabular

Databases

Situational Telemetry

Instrumentation

Historians

KNOWLEDGE GRAPH

SEMANTIC GRAPH

All sources of data must be unified through an enterprise context graph to define data products for agents to utilize.

CONTEXT GRAPH

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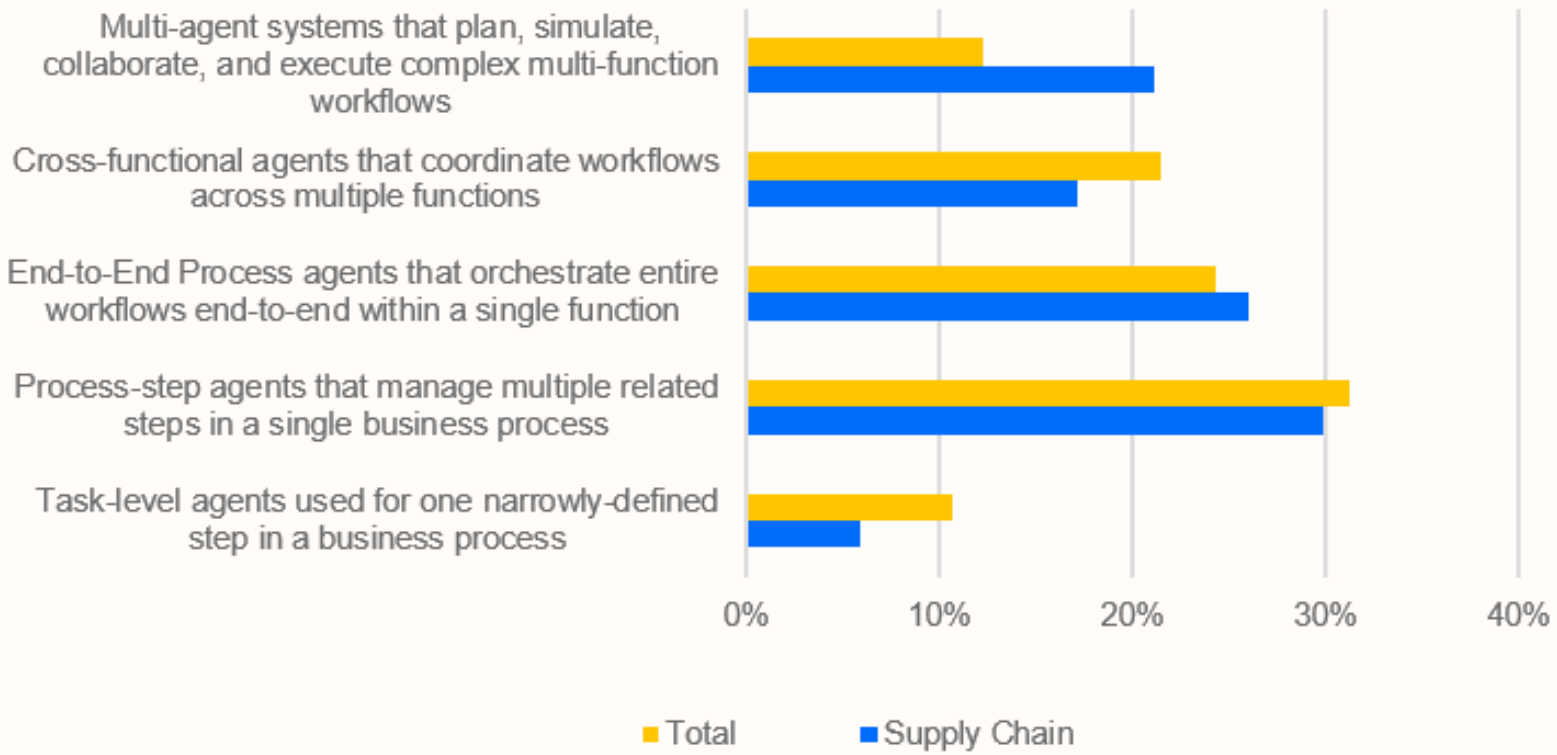
# A Supply Chain Example

*Q. How would you characterize the scope of AI agents currently deployed within your supply chain?*




- In conversations IDC is having with supply chain organizations, most of the early implementations of Agents are either for 'narrower' tasks or in process-specific roles like demand forecasting or supply planning.
- Although the aspiration is clearly toward a **hierarchy of agents with the ability to orchestrate end-to-end processes** like order-to-cash.
- IDC also sees clear progression to cross-functional agents to help to manage broader business capabilities like working capital (Supply Chain + Finance) or direct procurement (Supply Chain + Sourcing/Procurement)

Early Adopter AI Functional Use Case Study, March 2026, Total n=1967, Supply Chain n=148 (Weighted Results)

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# Enterprise AI Agent Hierarchy

*Modeled on U.S. Army Rank Structure — Officer Chain (Strategy & Command) and NCO Chain (Execution & Craft)*

## OFFICER CHAIN — COMMAND & PLANNING

**GENERAL**
Strategic Orchestrator — sets mission, allocates resources

**COLONEL**
Domain Commander — owns a full business function

**LIEUTENANT COLONEL**
Deputy / Program Lead (optional) — runs a sub-program

**MAJOR**
Staff Planner — turns workstream into a concrete plan

**CAPTAIN**
Team Lead — owns one project or deliverable

**LIEUTENANT**
Junior Task Lead — first-line supervision of execution agents

## NCO CHAIN — EXECUTION & CRAFT

**SERGEANT MAJOR**
Senior Execution Advisor — deep expertise, no command authority

**SERGEANT**
Crew Lead — supervises a handful of worker agents

**CORPORAL**
Skilled Individual Contributor — executes tasks needing judgment

**PRIVATE**
Basic Execution Agent — narrow, high-volume, low-judgment tasks

Solid line = direct command/reporting  ·  Dashed = optional layer or advisory (no command authority)  ·  Red = officer chain  ·  Blue = NCO chain

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# COO Supply Chain Agent Army

*Master Organization Chart · Mission: Perfect Order Performance · Operating Cost · Working Capital · Process Speed*




Each Colonel commands two Major-level programs, each a full six-rank chain to Private. *Full rosters for every rank, in every vertical, are detailed in the companion report.*

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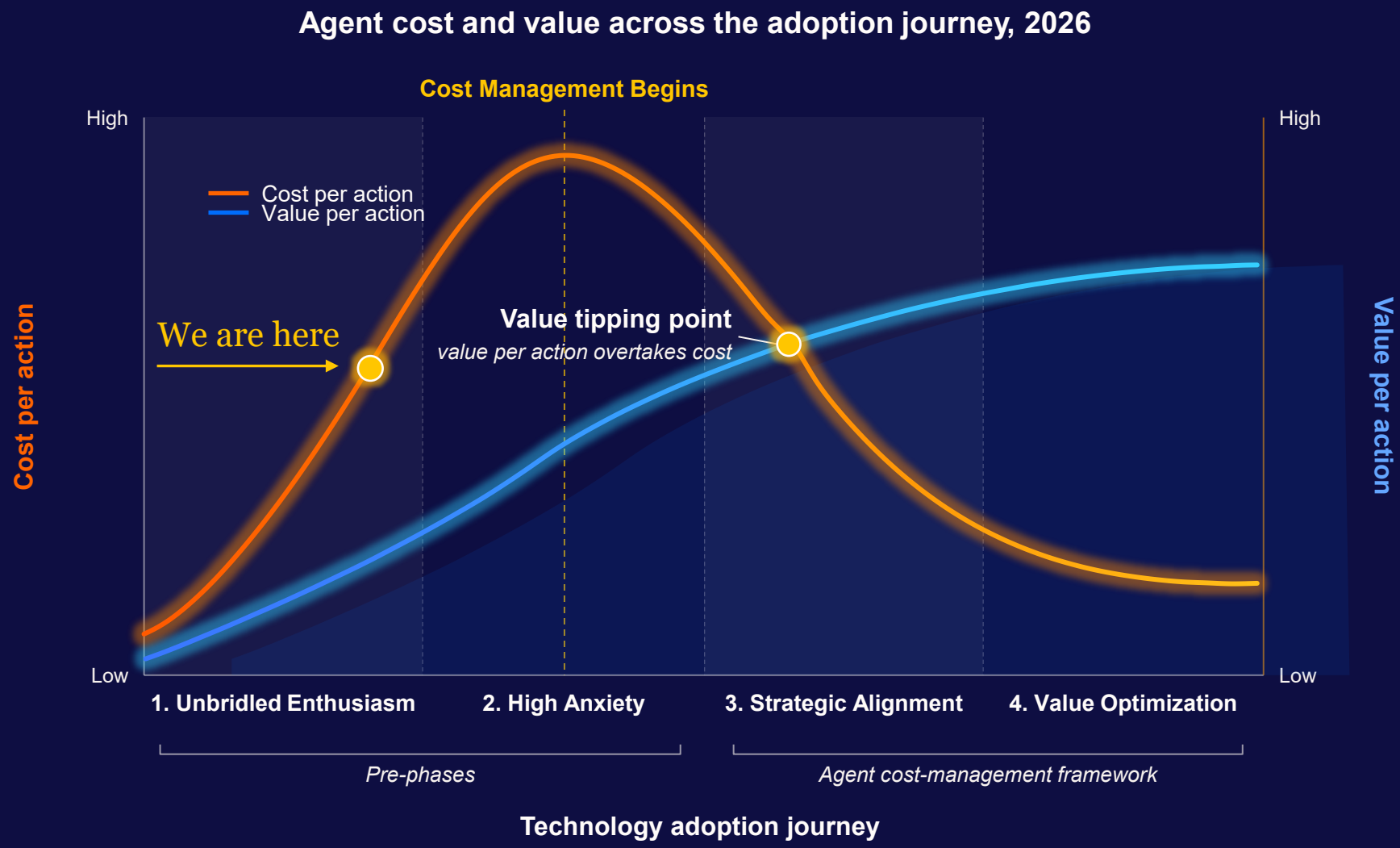
# And enterprises are just getting started




Source: IDC, 2026

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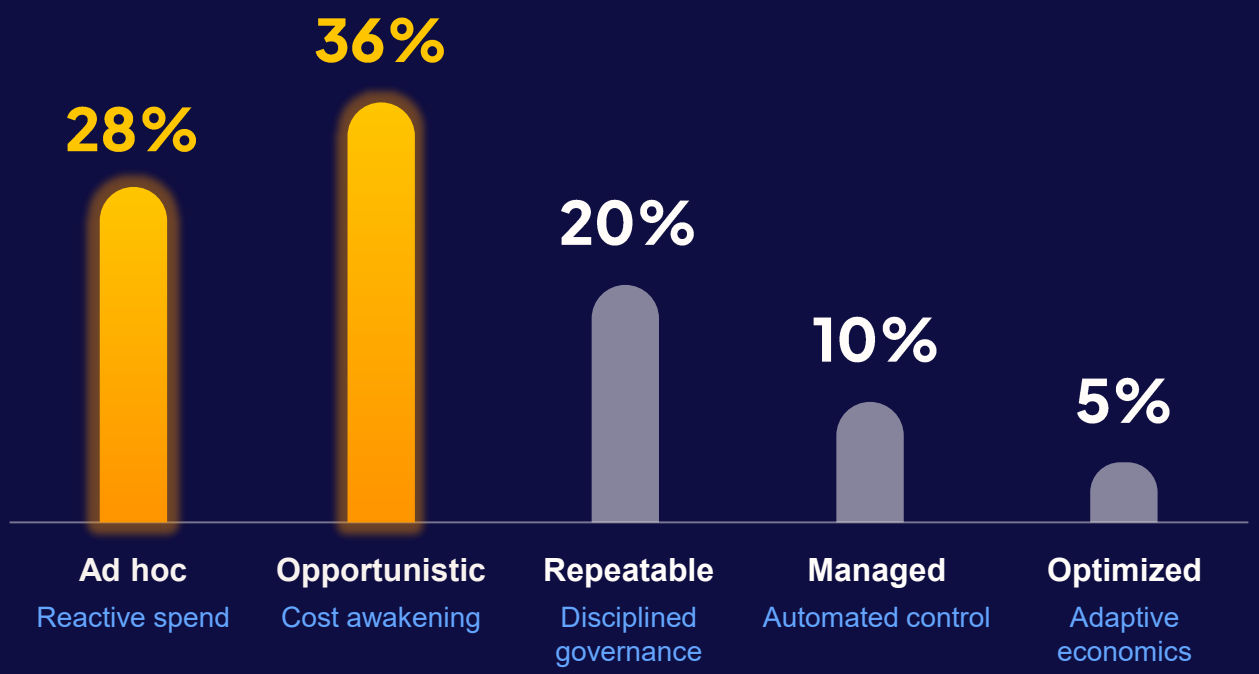
# Leaders manage AI cost as a discipline, not a set of tactics

IDC AI COST MANAGEMENT MATURITYSCAPE 1.0




Source: IDC MaturityScape: AI Cost Management 1.0 (#US54949526, October 2026) and IDC AI Cost Management Maturity Benchmark, 2026. n = 1,128

WHERE THRIVERS PULL AHEAD

DATA AND CONSUMPTION TELEMETRY

**+18 pts**

Log every inference call by team and use case.

STRATEGIC VALUE AND UNIT ECONOMICS

**+17 pts**

Track cost per outcome, not raw usage.

GOVERNANCE AND FINANCIAL OPERATIONS

**+16 pts**

Set spend caps and circuit breakers on agents.

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# Essential Guidance

## Relative to the “3 Keys”

- Aspire to connect context to information constructs but don’t attempt to boil the ocean
- Take a data product approach to making information available to the organization including agents
- Bring focus to investments, weed out efforts that don’t have immediate impact on your moments of truth
- Maximize value by focusing on reengineering decision processes that will underpin new standards for speed and scale
- Utilize all sources of agentic capabilities, but have a reference architecture that enables orchestration and aligns with business architecture

## Other Considerations

- Get ready for a world where most of your cost is consumption or outcome based. Have a strong approach to FinOps and infrastructure arbitrage.
- Cybersecurity attacks will become adaptive and unpredictable. AI-powered defenses will have to become outcome focused.
- Ethical AI will only become more difficult to manage. Plan on continuously updating your guardrails.
- Expect organizations to become much flatter as middle management roles transform to ones centered on expertise. Not all employees will make it.
- Don’t get discouraged if early results aren’t as expected. This isn’t traditional software.

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