IDC AI & Data Summit

Agentic AI at Scale:

Accelerating Innovation While Managing Risk

Chicago

Matt Eastwood

SVP, WW Research

2.5 billion AI agents worldwide by 2030.

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

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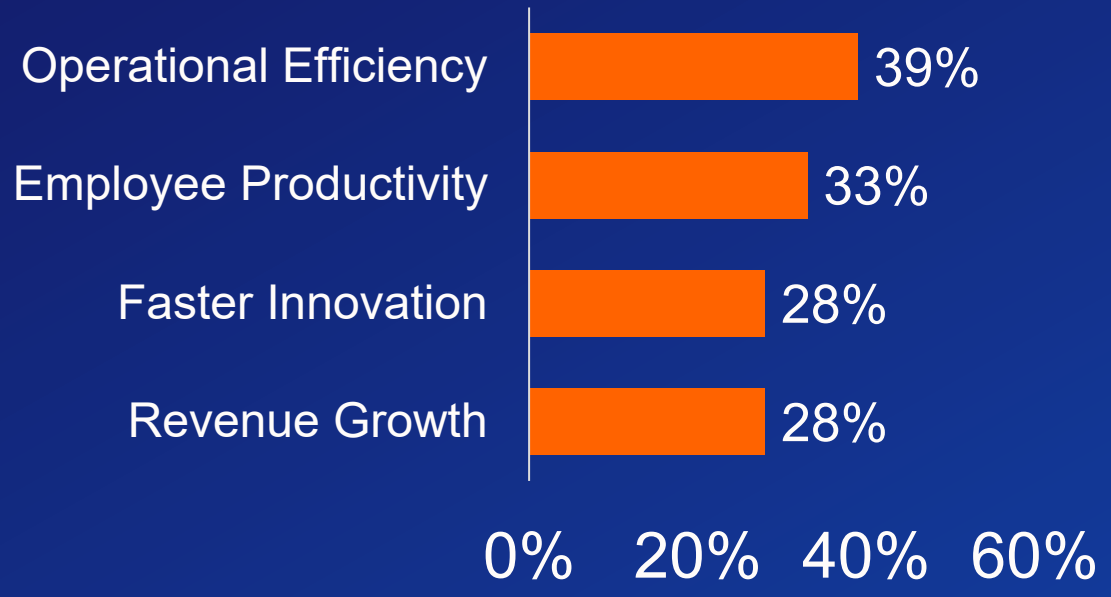
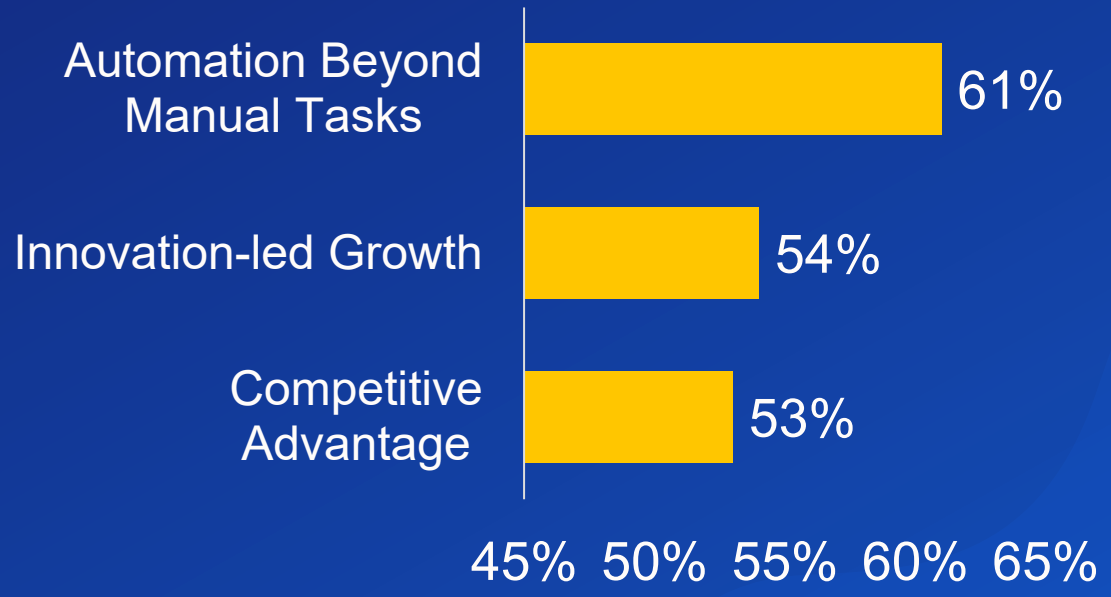
Efficiency first, growth staged next

Anticipated benefits of Agentic AI



Leading Strategic Priorties



GenAI changed how organizations create

Agentic AI changes how they act

Source: IDC AI Leaders Survey, fielded March 2026, published June 2026 (n=984)

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Governing digital labor before it outnumbers you

45:1

Non-human identities now outnumber human identities in the average enterprise.

A SECURITY & TRUST ISSUE

This is an identity-management challenge, not a headcount one.

AI-DRIVEN LAYOFFS ARE ACCELERATING

Hundreds of thousands affected in 2026 — more than half cite AI or automation.

MEASURE EFFICIENCY, NOT JUST JOBS

IDC views this as an emerging trust liability — with real productivity gains and workforce transition risk.

Source: IDC agentic governance tracking, cited in September 4 2026 & August 27 2026 IDC Perspectives

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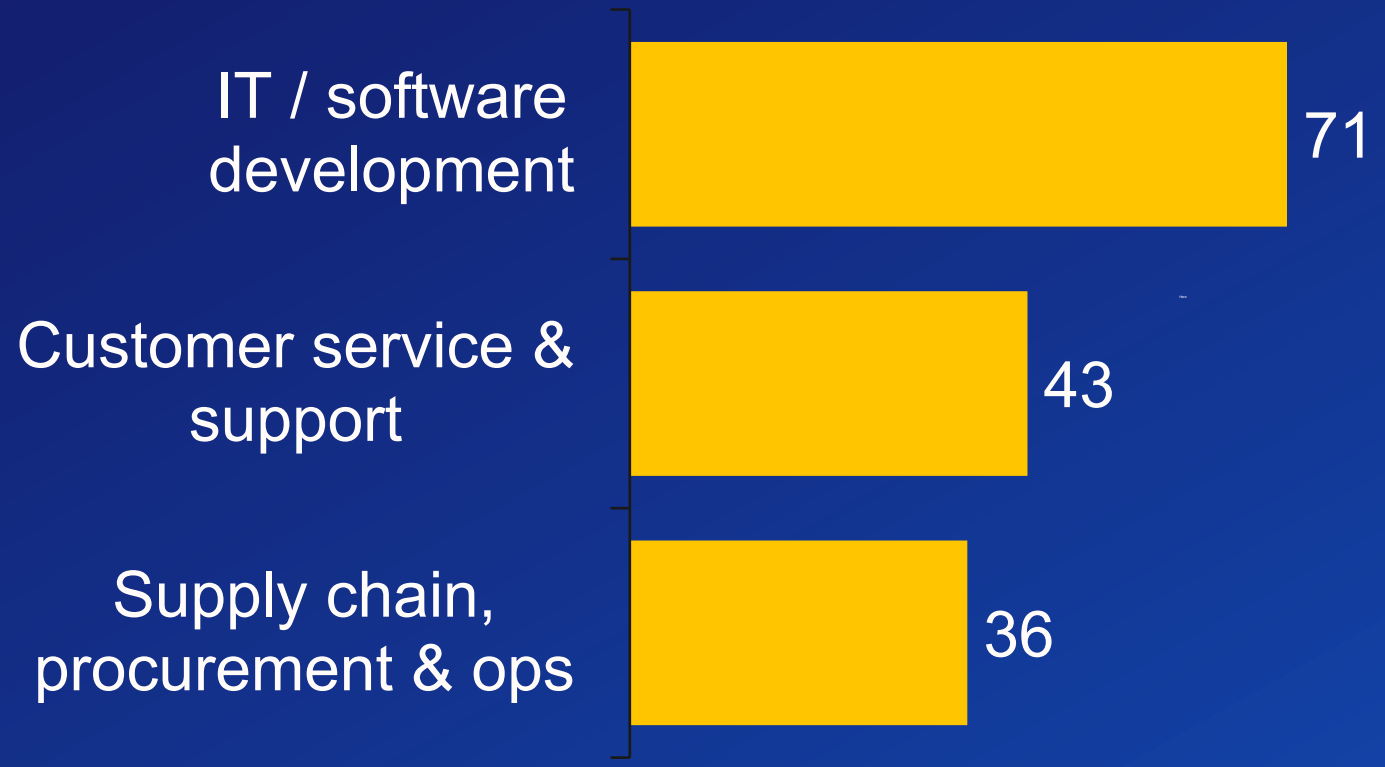
IT and software development leads production deployment



Spend is fragmented, not concentrated

Business process automation	**60.7%**
Customer-facing agents	**56.9%**
Decision-support agents	**56.0%**
Coding agents	**53.6%**

No single agent type dominates budget — a governance point in itself: exposure is spread, not cornered.

Source: Future Enterprise Resiliency & Spending Survey, Wave 4, IDC, July 2026

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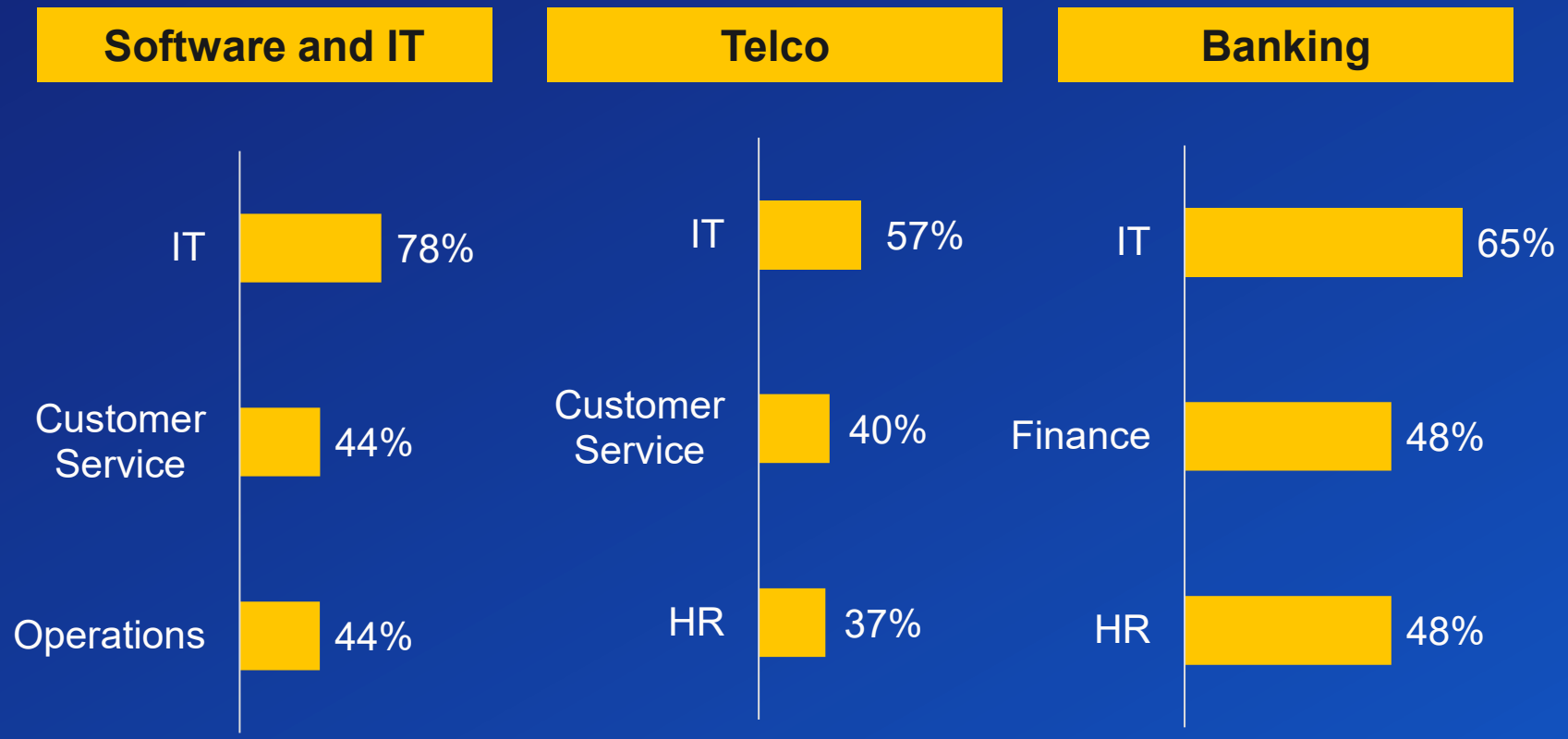
IT vendors, Telcos, and Banks leading in AI agentic deployment

Top industries deploying AI agents

- **Software and IT**
- **Telco**
- **Banking**

Top functions in which deploying AI agents



Source: Future Enterprise Resiliency & Spending Survey Wave 9, IDC, December, 2025. n=992

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Production is the norm now — but rarely cross-functional

AI is in production at scale, **but most organizations** are still capturing only a fraction of its potential.

95.3%

of enterprises now run at least one production agent workflow — averaging ~11 concurrent workflows.

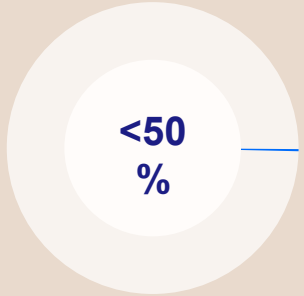
Only 3.4% report zero.

~1 in 3

organizations has implemented a genuinely cross-functional, multiagent solution to date.

<50%

of proofs of concept convert to production.



Why scaling stalls

If one agent step succeeds most of the time, a chain of three dependent agents succeeds three quarters of the time.

It's execution maturity, not ambition, that's the binding constraint.

Source: Future Enterprise Resiliency & Spending Survey, Wave 4, IDC, July 2026

Wal-mart from bots to super agents

Suresh Kumar
Chief Technology Officer and Chief Development Officer

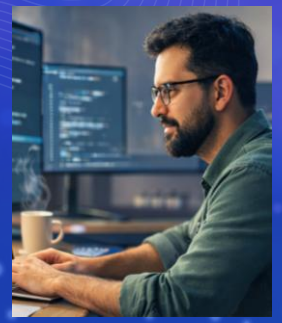
"I believe in the power of agentic AI to transform industries.

We've been building agents—fast- for every aspect of the business."

Customer shopping agent

Associate agent

Partner agent



Developer agent

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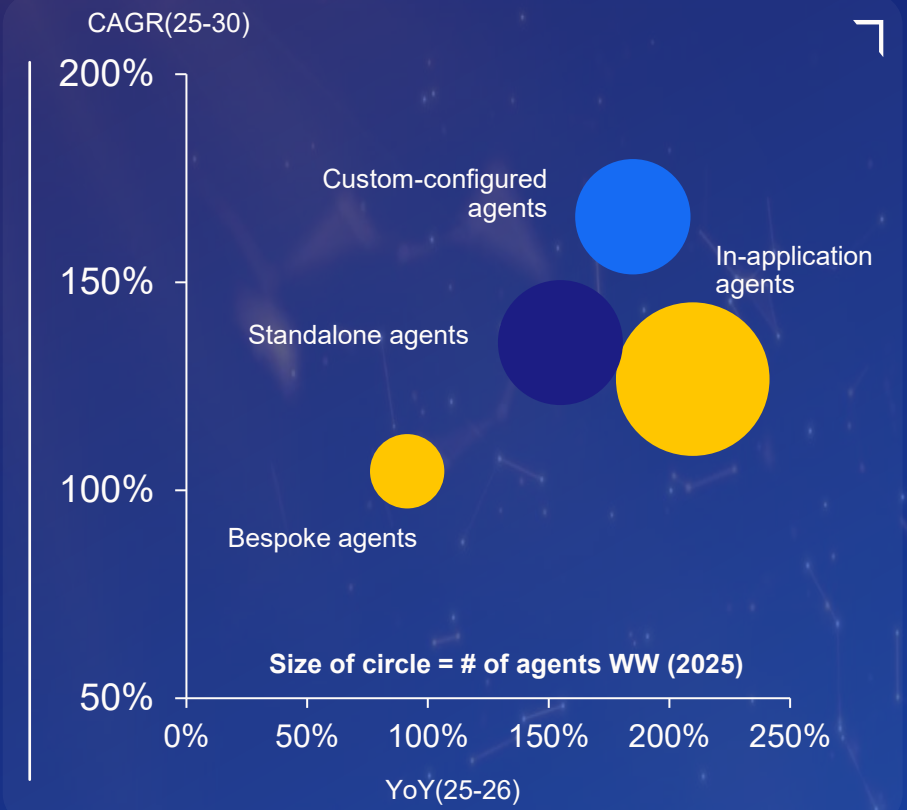
Enterprises adopt agent types based on speed and ease of deployment

of Agents



In-app agents. Embedded inside app to automate workflows

Standalone agents. Purpose-built and run by an agent provider

Custom-configured agents. Developed by organizations for business operations automation without requiring heavy programming skills

Bespoke agents. Deployed by highly technical teams for specialized functionality.

No single agent type dominates spend — business process automation (60.7%), customer-facing (56.9%), decision-support (56.0%), and coding agents (53.6%) all claim a similar share of budget.

Source: Agent Economics Adoption and Delivery model, IDC, December 2025; spend split — FERS Wave 4, IDC, July 2026

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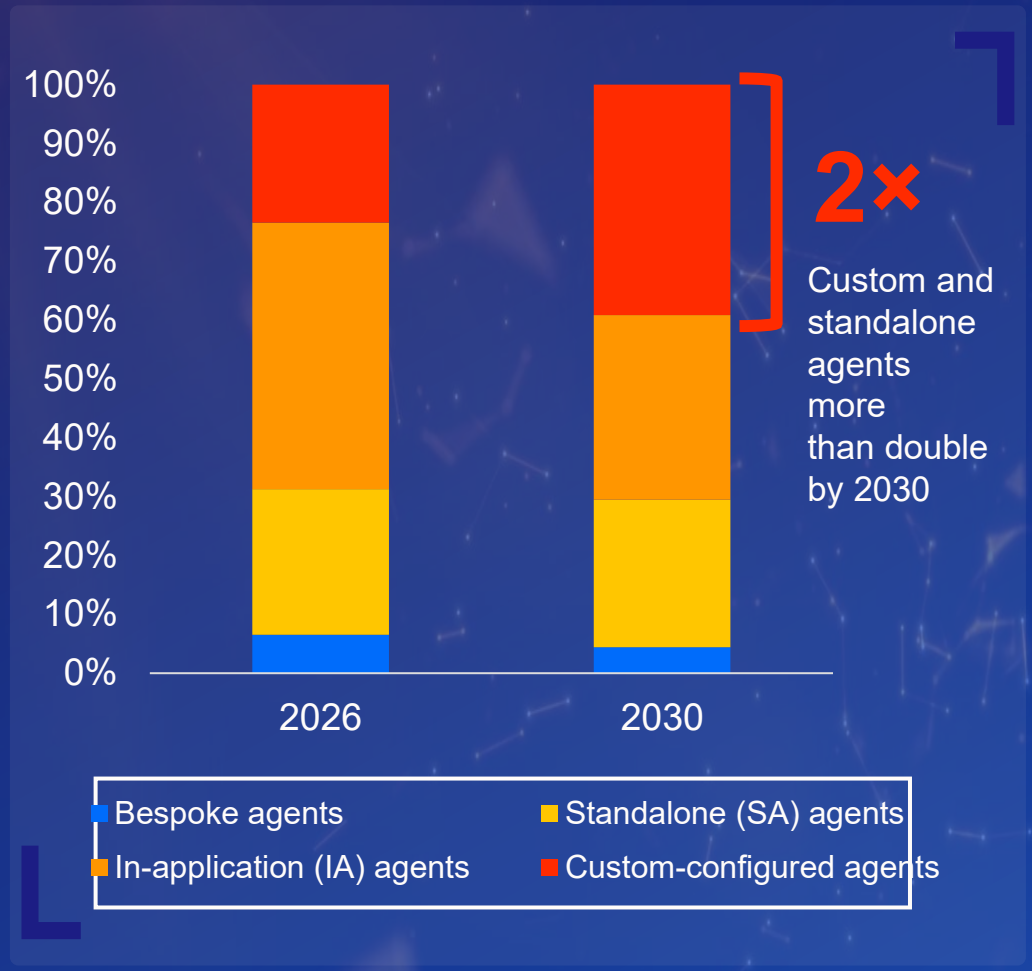
In the future, custom configured and standalone agents will dominate

Worldwide agents 2025 to 2030 forecast

Percentage of Total, 2025-2030



CUSTOM-CONFIGURED AGENTS

Will become the leading agent type by 2030.

Deployed across multiple applications.

STANDALONE AGENTS

Will scale rapidly

as agent-to-agent (A2A) standards mature.

IN-APPLICATION & BESPOKE AGENTS

Will serve specialized needs

with extensibility and security constraints.

Source: Agent Economics Adoption and Delivery model, IDC, December 2025; interoperability — The Open Imperative, IDC, July 2026

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Scaling agentic AI requires four things

ACCELERATION · ORCHESTRATION · RESILIENCY · GOVERNANCE

Source: Autonomy on a Leash, IDC, August 2026

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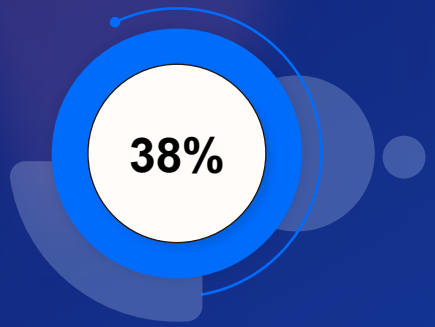
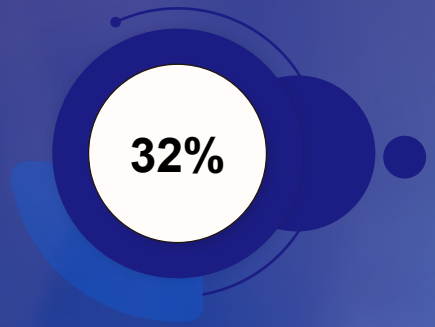
In 2026, organizations are rebuilding their tech stack

Resiliency



Enhancing cyber recovery & resiliency

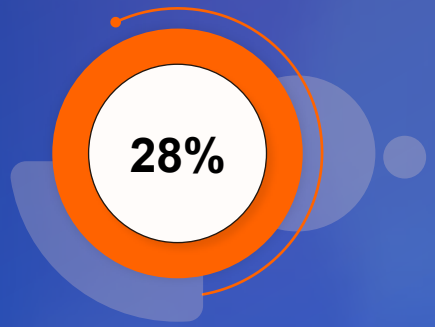
Acceleration



Modernizing infrastructure in corporate datacenters

Migrating applications from on-premises to cloud

Orchestration



Modernizing core enterprise apps

Source: Future Enterprise Resiliency & Spending Survey Wave 9, IDC, December, 2025 n=1007. Q: Which of the following areas do you expect to most significantly increase spending in 2026

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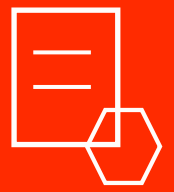
Rebuilding the security layer for resiliency

Leaders know governance is critical — **but execution lags.**

92%

say governing agents **is critical.**

44%



have actually **implemented a policy.**

73%

embed governance into **AI strategy — few enforce.**

Customer-facing agent rollback rates remain **near 3-in-4** — even among the most governance-mature organizations.

A single popular open-source agent runtime carries **100+ disclosed vulnerabilities**, with installed-base exposure in the hundreds of thousands.

IDC names the operationalization gap — defined principles without enforcement — **"the defining governance risk of 2026."**

Source: Future Enterprise Resiliency & Spending Survey Wave 9, IDC, December, 2025 n=1007. Q: which of the following areas do you expect to most significantly increase spending in 2026?

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Rebuilding the infrastructure layer for acceleration

By 2027, the massive computational and data demands of AI will compel **80% of organizations to modernize legacy private and public cloud environments** by shifting to new platforms designed for AI workloads.

CLOUD
Shift to AI-ready cloud/ hybrid platforms

IT OPS
Unified control planes to define policy once, automate across clouds,

SOVEREIGN CLOUD
Migrate workloads to sovereign or in-country environments

FINOPS for AI
FinOps to model AI-specific costs and guide workload placement.

IDC Source: Future Enterprise Resiliency & Spending Survey Wave 9, IDC, December, 2025 META= 123

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Rebuilding the software layer for orchestration

By mid-2027, **70% of enterprises will automate many of their manual and semi-manual workflows with agents**, increasing their usage and reliance on technology by 30% throughout their organization.

Multiagent operations across business functions require:

- Orchestration layer to enable a cross-department orchestration
- Agents able to discover services, route work, and enforce policy
- Ability to synchronize across SaaS estates and hybrid cloud environments

- Standardize and modernize apps
- Remove customization and integration sprawl

- Separate UI logic from workflow logic
- Expose capabilities via standardized APIs for agent access.

Source: Future Enterprise Resiliency & Spending Survey Wave 9, IDC, December, 2025 n= 1007. Q: which of the following areas do you expect to most significantly increase spending in 2026?

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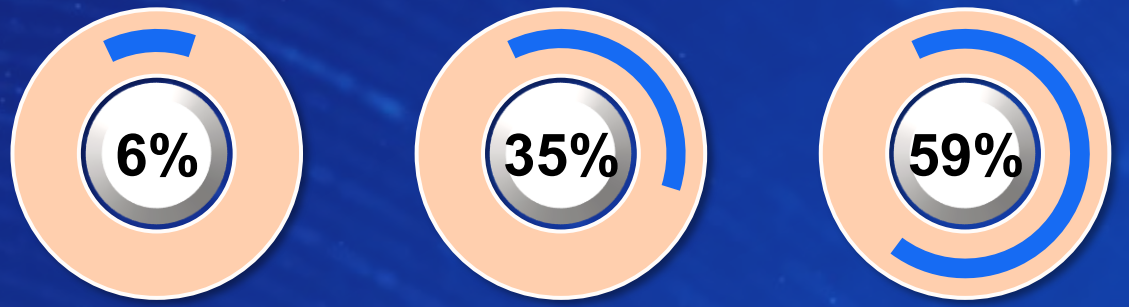
AI will drive significant spending in 2026 and beyond

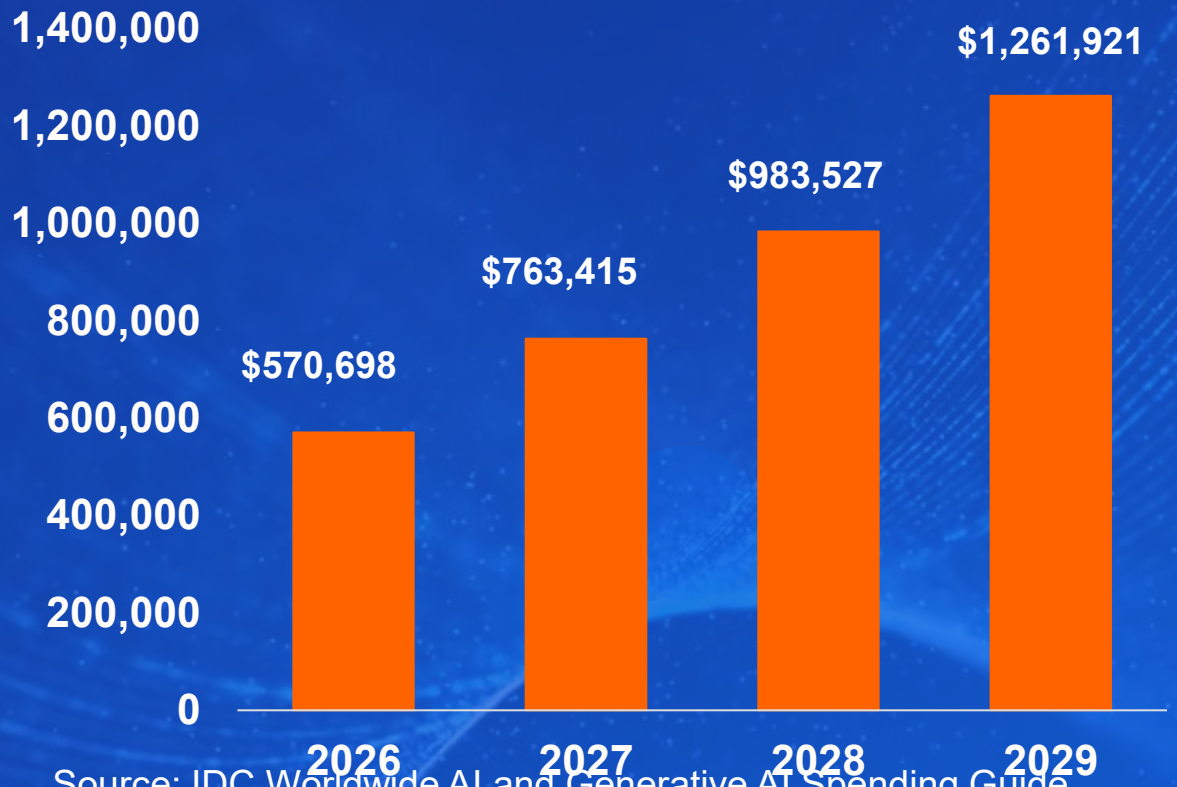
2026 IT Spending Outlook



Lower than in 2025	Same as in 2025	Higher than in 2025

Source: IDC Future Enterprise Resiliency & Spending Survey Wave 9, IDC, December, 2025 n=1007

AI Spending ($M) 2026-2029



Source: IDC Worldwide AI and Generative AI Spending Guide. August 2025

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A shift in the IT industry we haven't seen in 20+ years

Value shifts to vendors that are orchestration-ready, acceleration driven, and recovery-proven

Winners

- **Apps:** Platforms that expose well-permissioned functionality
- **Cloud:** Platforms evolving into intelligent control planes
- **Security:** Breach reality architectures with zero trust and immutable backups
- **Services:** Productized, platform-enabled offerings.

Losers

- **Siloed Apps:** Reliance on tightly coupled workflows or UI-bound logic
- **Cloud:** Legacy clouds optimized for generic workloads
- **Security:** Vendors that can't ensure clean, rapid recoveries
- **Services:** Reliance on bespoke, talent arbitrage models

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