IDC

FutureScape field manual: C-suite edition

The market leadership imperative: Creating advantage in the agentic economy

A guide for business leaders

Executive foreword

In every era of transformation, there comes a moment when leadership shifts from focusing on control to focusing on navigation. The 2026 IDC FutureScape marks that moment. Artificial intelligence is shifting from experimentation to orchestration with an emphasis on innovation. The adoption of agentic AI is reshaping how enterprises operate, decide, and grow. Yet the forces driving this change go well beyond technology. Economic volatility, regulatory acceleration, digital sovereignty, and workforce disruptions are colliding to form what IDC calls the crosscurrents of the agentic economy.

This Field Manual is not a checklist. It is an invitation: a shared language for leaders navigating these crosscurrents. It connects what is happening now to what must be discussed next between CEOs, line of business leaders, and CIOs, between COOs and CHROs, and between CFOs and CMOs.

Each section combines IDC's 2026 research and analyst insights with questions designed to spark peer dialogue and shared discovery.

Rick Villars
Group Vice President,
Worldwide Research

The world in crosscurrents

In navigation, a crosscurrent pushes a vessel sideways even when the sails are perfectly set. Global business is now caught in similar forces in this AI era. The challenge for leadership is not to fight the currents but to understand their direction.

The five crosscurrents to watch

Economic Volatility
By 2028, 60% of multinational firms will split AI stacks across sovereign zones, tripling integration costs but enhancing strategic resilience (IDC FutureScape 2026; AI-Fueled Business Strategies; Prediction #3).

Signal to watch: AI investment cycles are colliding with the rising cost of capital and shorter planning horizons.

Shift to expect: Capital discipline and innovation speed are becoming the same conversation.

→ Question to ask: What portion of our next-year growth is already dependent on AI-driven productivity gains?

Geopolitical Realignment and Sovereignty
By 2027, 75% of non-U.S. G2000 enterprises will prioritize pursuit of AI sovereignty using regional partners and open technologies (IDC FutureScape 2026; AI & Automation; Prediction #8).

Signal to watch: Nations are asserting digital borders through data residency and AI sovereignty.

Shift to expect: Technology strategy now equals geopolitical strategy.

→ Question to ask: Can our data and our algorithms travel where our business does?

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The future CIO must lead the AI transformation, driving business value realization while managing costs, complexity, and compliance. Strengthening agility and resilience against regional digital sovereignty mandates and geopolitical disruptions will be crucial for long-term success."

Ranjit Rajan
Vice President, Research Middle East, Türkiye, and Africa; Contributor, Worldwide CIO Agenda 2026 Predictions

Regulatory Acceleration

By 2028, 100% of Global 100 and 50% of Global 1000 will spend over $2 million annually on unified AI governance software including ethics and privacy (IDC FutureScape 2026; AI & Automation; Prediction #5).

Signal to watch: AI regulation is outpacing many enterprises' readiness.

Shift to expect: Compliance is evolving into competitive differentiation.

→ **Question to ask:** How transparent is our model lineage? Can we prove what our AI has learned and when it did?

Workforce Disruption

By 2028, 45% of national governments will restructure workflows around human–AI collaboration, increasing productivity by 30% (IDC FutureScape 2026; National Government; Prediction #1).

Signal to watch: Agentic automation removes repetition but creates new roles in oversight and orchestration.

Shift to expect: Work is no longer about substitution; it's about supervision

→ **Question to ask:** What new skills will our workforce need to manage the machines that learn?

Customer Trust and Transparency

By 2027, 60% of enterprises deploying agentic AI will require an AI Bill of Materials to support security and compliance (IDC FutureScape 2026; Security & Trust; Prediction #4).

Signal: Customers expect explainable AI and visible accountability.

Shift: Trust has become a measurable business outcome.

→ **Question to ask:** Who in our organization owns the trust KPI?

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AI agents have the potential to transform government policymaking, service delivery, and operations. To realize the potential benefits, government CIOs, CAIOs, and mission leaders need to address open issues such as data and infrastructure readiness, AI sovereignty, acquisition reform, and the impact of automation on the workforce"

Massimiliano Claps
Research Director,
IDC Government Insights;
Contributor, National Government
2026 Predictions

The four pillars of the agentic future

IDC's 2026 FutureScape research identifies four domains where leadership transformation is already underway. These pillars serve as a shared compass for the executive team, providing a framework for understanding the shifts ahead and the questions worth asking.

Pillar 1: Navigating the crosscurrents of disruption

Markets, supply chains, and data ecosystems are all in motion; volatility is no longer episodic but structural. IDC's 2026 research shows that by 2030, 60% of new economic value will come from companies investing early to scale AI capabilities (FutureScape 2026; AI-Fueled Business Strategies; Prediction #1). The leaders who prevail will treat disruption not as crisis but as capital strategy—governing for stability while funding reinvention at the speed disruption demands.

Role Reflection: CEO/CFO — How do we govern for stability while still funding innovation at the speed disruption demands?

"In the next decade, technology vendors won't just sell to finance—they'll be shaped by it. The CFO's priorities will determine which platforms survive and scale across the enterprise."

Heather Herbst
Research Director, IDC Worldwide CFO Buyer Insights, CFO Tech Agenda 2026 Predictions

Pillar 2: Charting the path to enterprise-wide orchestration

AI is moving from tool to infrastructure, creating what IDC calls the enterprise's nervous system. By 2028, 70% of top enterprises will deploy unified AI orchestration platforms to govern, automate, and monitor agentic operations (IDC FutureScape 2026; AI-Enabled Enterprise Applications & Agents; Prediction #5). This shift demands visibility and governance that extend beyond IT—linking architecture, ethics, and agility under one command structure..

Role Reflection: CIO/CTO — How do we lead the enterprise's transition from pilots to orchestrated AI infrastructure?

"Three key themes will dominate IT industry developments: orchestrating a sustained expansion in AI agent use across the enterprise; navigating major tech-sector transformations driven by the industry's agentic AI pivot; and preparing to capitalize on fast-maturing quantum computing, next-generation connectivity, and physical AI devices to boost resiliency and business reach."

Rick Villars
GVP Worldwide Research; IT Industry 2026 Predictions

Pillar 3: Building trust, resilience, and prosperity

Trust has become a measure of operational excellence. Organizations that embed transparency, explainability, and oversight into daily operations will outperform peers on innovation and resilience. IDC projects that by 2029, 60% of enterprises will adopt proactive, AI-driven compliance and risk management systems embedded into daily operations (IDC FutureScape 2026; AI-Enabled Enterprise Applications & Agents; Prediction #4). The organizations that win will treat trust not as compliance, but as leadership behavior and a business differentiator.

Role Reflection: COO/CHRO — How can we institutionalize trust through measurable transparency and accountable leadership?

> "The digital landscape we are creating has both increased risk and enormous opportunity. In this era of agentic AI and accelerating vendor volatility, resilience depends on anticipating risks, capitalizing on innovations, and responding to changing customer expectations."

Grace Trinidad
Research Director, Future of Trust; Security and Trust 2026 Predictions

Pillar 4: Unlocking innovation beyond productivity

Innovation has shifted from efficiency to imagination. IDC forecasts that by 2028, 70% of enterprise applications will employ AI agents to optimize pricing, contracting, and engagement (IDC FutureScape 2026; AI-Enabled Enterprise Applications & Agents; Prediction #6). The most advanced firms are pairing creative experimentation with governance discipline, ensuring that generative systems fuel brand growth rather than brand risk.

Role Reflection: CMO/CSO — How will you balance experimentation speed with brand trust?

> "Marketing's future is here: CMOs will own growth, experience, brand, and the customer relationship end to end. Those who embrace AI and human creativity together will have the competitive advantage"

Laurie Buczek
Group VP, Executive Insights; CMO 2026 Predictions

Trust dashboard: Translating governance into operational confidence

Developed from IDC's Security & Trust 2026 Predictions and cross-agenda research in AI-Enabled Enterprise Applications and National Government 2026 reports.

Trust is not an abstract value; it is a pattern of behaviors that can be observed and improved. IDC research shows that by 2029, 60% of enterprises will embed AI-driven compliance and risk management directly into daily operations (IDC FutureScape 2026; Security & Trust; Prediction #4).

This dashboard illustrates how those signals can be monitored, not to quantify trust, but to make it visible and actionable. Each indicator represents a behavior that builds organizational confidence and stakeholder assurance.

Signal	Focus	Leadership Implication
Bias Δ	Tracks deviation between model training and live outputs.	Reveals fairness discipline in data pipelines.
Drift Alarms	Identifies model performance degradation.	Ensures AI accountability doesn't lapse over time.
Explainability Coverage	Measures visibility into AI decision pathways.	Links transparency to customer and regulator trust.
Policy Traceability	Connects models to their governance policies.	Demonstrates executive oversight and ethical lineage.
Resolution SLA	Tracks how fast identified risks are addressed.	Converts governance into measurable responsiveness.

The leadership imperative: From awareness to agentic advantage

For AI to deliver measurable advantage, it must become part of the enterprise's connective tissue, governed, transparent, and aligned with strategy. Leadership today is less about direction and more about alignment: between technology and trust, innovation and control.

Unified Leadership for a Converging World

IDC's 2026 cross-agenda research reveals that the boundaries between functions are dissolving. CFOs are assuming roles in AI risk; CIOs are embedding governance into code; COOs are linking compliance and performance. Leadership itself is becoming orchestrated.

Role Reflection: CIO/CTO — How do we integrate intelligence across systems to unlock the next wave of enterprise growth?

"Breaking down silos and integrating data and intelligence across systems will be essential to drive the next wave of growth and efficiency."

Andrew Buss

Senior Research Director, Europe: Future Of Digital Infrastructure;
IDC FutureScape: Digital Infrastructure 2026 Predictions

Decision Velocity: Leading with Confidence at Speed

IDC's 2026 FutureScape research highlights a new leadership challenge: how to accelerate decisions without eroding trust. Executives increasingly describe their edge not as moving faster, but as moving faster with confidence. IDC refers to this balance of speed and governance as decision velocity—a way to describe how effectively an organization converts trusted data into timely action.

Role Reflection: COO/CHRO — How can we build decision confidence that matches the speed of change?

"The world of AI and automation technologies is becoming more complicated, and the interdependencies between AI and automation, as well as dependencies on data and integration foundations, infrastructure strategies, skills, effective governance, and more, are becoming increasingly obvious as enterprises seek to gain business value from these technologies at scale."

Neil Ward-Dutton

VP Research, AI And Data Management;
AI And Automation 2026 Predictions

Three dimensions of agentic leadership

IDC identifies three recurring imperatives — **governance, orchestration, and culture** — that shape enterprise maturity. Governance defines accountability and ethics; orchestration aligns people and data to outcomes; culture sustains experimentation and learning. Together, they form the fabric of an adaptive, learning enterprise.

Role Reflection: CHRO — How do we prepare our workforce to lead alongside intelligent systems?

"Success will depend on how well institutions balance innovation with governance, workforce reskilling, and trust frameworks that make digital transformation sustainable."

Sam Abadir
Research Director, Risk, Financial Crime, And Compliance; Banking And Payments 2026 Predictions

AI investment framework: Aligning innovation and resilience

IDC's CFO Tech Agenda 2026 research shows that CFOs are taking a lead role in AI governance, ensuring that risk, compliance, and innovation investments move in sync. This emerging framework aligns digital modernization, data governance, and workforce change under a unified funding horizon — turning AI from opportunistic spending into disciplined reinvention. By 2030, 60% of new economic value will come from companies investing early to scale AI capabilities (IDC FutureScape 2026; AI-Fueled Business Strategies; Prediction #1).

Role Reflection: CEO/CFO — How do we govern for stability while still funding innovation at the speed disruption demands?

"As AI advancements disrupt markets, CEOs have a choice: either capitalize on this once-in-a-lifetime opportunity by responsibly embracing technology to fuel their business growth or get left behind. Credibility starts at the top, and CEOs must lead by example."

Teodora Snoddy
Research Manager, C-Suite Tech Agenda 2026 Predictions

The market leadership imperative

The agentic economy blurs the line between buyer and builder. Every enterprise is now both consumer and creator of technology. Leadership in this context is about market readiness: how to orchestrate value when customers, partners, and data ecosystems operate at AI speed.

"Success requires balancing agility with trust, scaling automation responsibly, and aligning governance models to ensure data remains a catalyst for innovation and business resilience."

Stewart Bond
VP, Data Intelligence and Integration Software; Contributor, Data and Analytics 2026 Predictions

Strategic readiness: A C-suite field checklist

Before embarking on major transformation, C-suite leaders should assess their readiness across strategy, data, workforce, and ethics. This readiness grid is a conversation starter for leadership teams aligning on priorities.

Area	Emerging Signals	Reflective Question
AI Strategy & Governance	Centers of excellence evolving into enterprise risk councils	Who owns AI accountability?
Data Architecture	Federated data replacing silos	Is our data trusted across boundaries?
Workforce Readiness	40% of enterprises expect hybrid human-agent roles by 2027 (IDC FutureScape 2026; CFO Tech Agenda; Prediction #7).	Are we reskilling fast enough?
Trust & Ethics	Governance shifting from reactive to predictive	How do we measure trust erosion?

The road ahead: The FutureScape Field Manual series

This C-Suite Edition begins an extended series designed to help executives explore the leadership challenges of the agentic era. Each edition deepens the conversation around one pillar.
Together, they form a living dialogue about how enterprises govern, orchestrate, and grow with AI.

Release cadence

Jan 2026: C-Suite Edition – Launch Edition
Provides the foundation for the series, defining the crosscurrents of the agentic economy and the unified leadership framework.

Feb 2026: CEO / CFO Edition – Navigating the Crosscurrents
Explores financial resilience, capital strategy, and growth in volatile markets. Offers predictive indicators for investment in AI-driven value creation.

Mar 2026: CIO / CTO Edition – Enterprise Orchestration
Guides technology leaders on building AI-ready infrastructure, orchestration frameworks, and governance systems for enterprise scale.

May 2026: COO / CHRO Edition – Building Trust & Resilience
Details operational transformation and workforce design for responsible automation, governance, and trust frameworks.

July 2026: CMO / CSO Edition – Unlocking Innovation Beyond Productivity
Focuses on customer experience, innovation culture, and AI-driven creativity for growth and competitive differentiation.

Navigate with confidence

Leadership today is about steering through uncertainty with conviction. The organizations that will win in the agentic era are those that turn foresight into frameworks, data into direction, and insight into measurable outcomes. Download upcoming CXO editions, register for analyst webinars, and follow the FutureScape 2026 discussion on #NavigateWithIDC.

In the age of agentic intelligence, leadership is navigation. Those who chart deliberately will define the future of the enterprise.