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THE TIPPING POINT:

How Agentic AI Is Redefining the Future of Work

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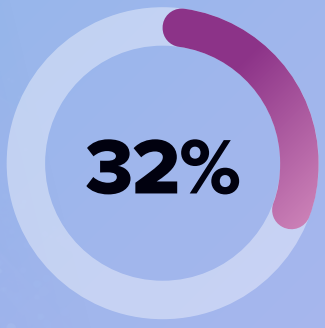
Introduction

To say AI has begun to completely transform enterprises, how they function, and how they engage with their customers would be an understatement. Whether it's using generative AI to create marketing content, AI advisors to provide insights into data, or AI agents to completely handle a business process, the use of AI to improve organizational efficiency and effectiveness has become increasingly persuasive. A recent IDC survey found that:



of CEOs believe that **in two years, nearly one-third of their organization's operations will be run using AI.**

say it will allow for **new operating models** (see **Figure 1,** next page).

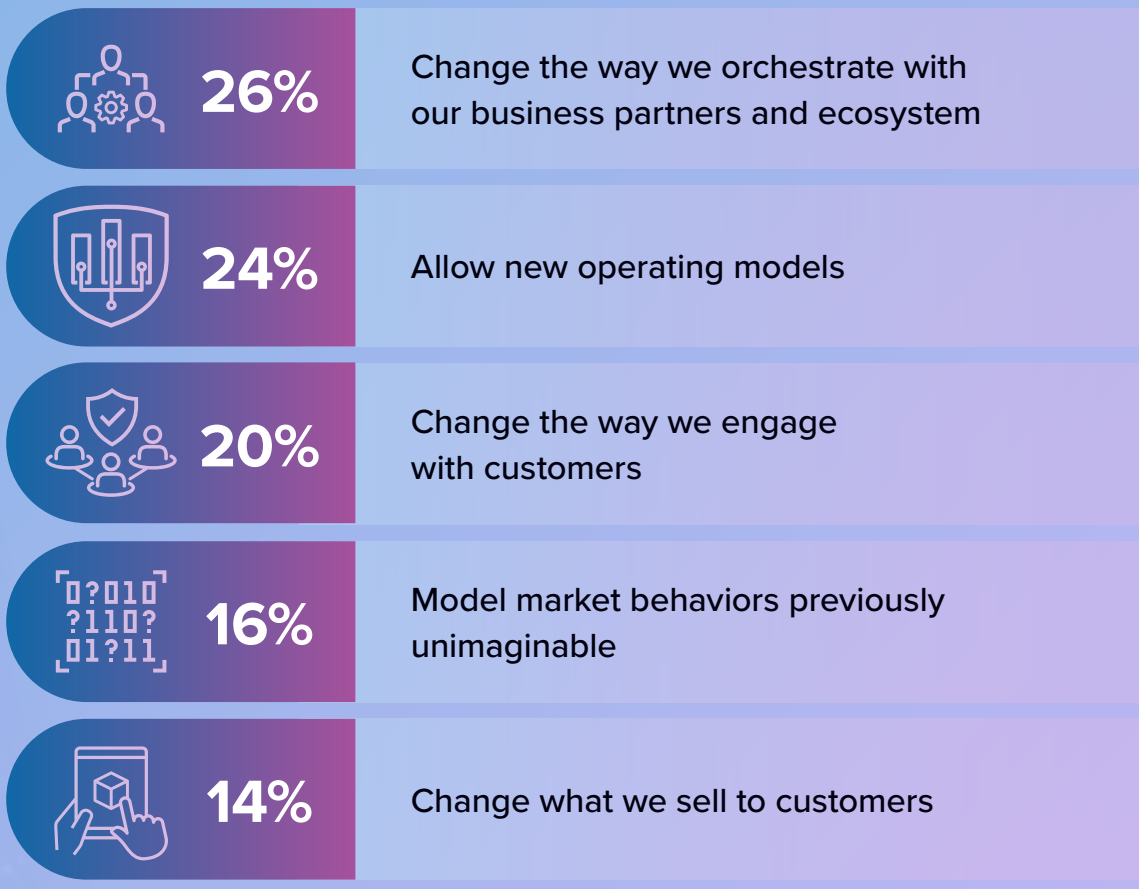
AI is a key catalyst in reinventing business.

Source: IDC's *Worldwide CEO Survey,* March 2025

FIGURE 1

CEOs Believe That AI Will Change Their Organization

What is the most important way you think AI will offer your organization a chance to reinvent its business model in three to five years' time?



Source: IDC's *Worldwide CEO Survey,* March 2025

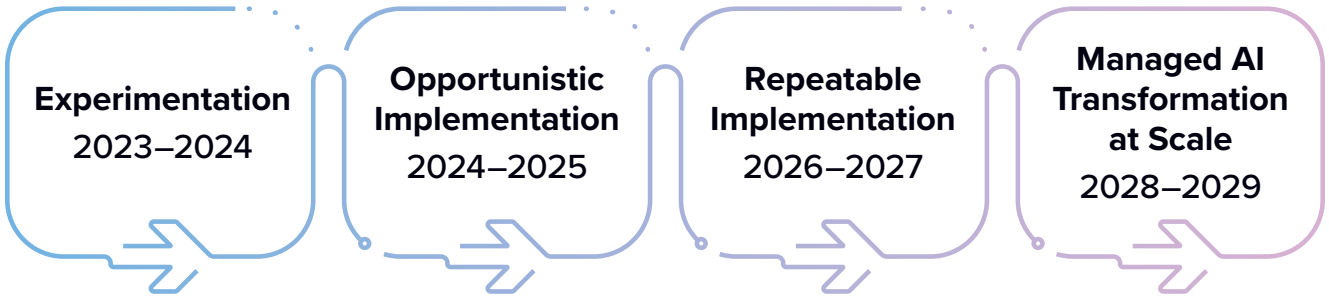
But the largest AI impact is still in the early stages of deployment. That impact begins when AI agents autonomously execute tasks that humans used to do, such as creating presentations, filling out spreadsheets, and researching topics (e.g., competing products). This will enable people to focus on other higher-value tasks, including relationship building, innovation, strategic thinking, and ethical judgment and oversight.

The Rise of Agentic AI

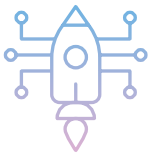
As IDC defines it, agentic AI refers to AI frameworks designed to operate autonomously, making decisions and taking action to achieve specific goals with minimal human oversight. Agentic AI is a keystone technology for the transition to a digital labor workforce. In less than a decade, IDC expects agentic AI to become embedded in most aspects of the enterprise and transform business models and the world around it. But what does the rise of agentic AI look like in the immediate future?

FIGURE 2

The Road Map for Agentic AI in the Enterprise



Source: IDC, 2025



The development of agentic AI will follow a similar road map to other technologies, though the time frame from experimentation to implementation to transformation will be compressed compared to previous technological evolutions.

The development of agentic AI will follow a similar road map to other technologies, though the time frame from experimentation to implementation to transformation will be compressed compared to previous technological evolutions.

The compression of the AI adoption timeline is primarily due to the approach of building off existing digital foundations, the technology's accessibility, and market pressures and competition. Given the compressed timeframe and differing nature of industries, this will be an uneven process with phases overlapping, industries and companies evolving at diverse speeds, and even business processes within the enterprise shifting at different rates.

In general, the road map for the rise of agentic AI is broken down into four phases (see Figure 2, previous page).

- **Ad-hoc experimentation (2023–2024):** Based on emerging agentic AI technology, enterprises began to develop use cases and experiment with agentic AI pilots. Enterprises test these pilots in sandboxes on clearly defined processes to evaluate the implementation costs, the value of adoption, and how they could integrate them into existing business processes.
- **Opportunistic implementation (2024–2025):** Once the value of adoption compared to the cost of implementation becomes clear, enterprises will take the existing and limited use cases into production while continuing to develop other potential use cases.
- **Repeatable implementation (2026–2027):** Recognizing the efficiency and effectiveness gains, companies will replicate the implementation pattern across similar processes and seek additional agentic AI use cases to further optimize their business.
- **Managed AI transformation (2028–2029):** The final near-term phase is the managed transformation of the enterprise with agentic AI. Rather than simply adding agents to existing workflows, businesses will begin to use agents to transform and even reinvent processes for greater efficiency and effectiveness.

These four phases of AI change will not only transform business processes and organizational structure but also the core fundamentals of production for a business.

Historically, labor was the primary factor of production. Over time, technology has changed the magnitude but not the factors of that equation. Businesses used technology to employ fewer people while producing more products, and the products were often better and less expensive. Digital technologies such as computing, applications, cloud, mobile devices, machine learning, AI, and generative AI are all stepping stones in this technologically driven change.

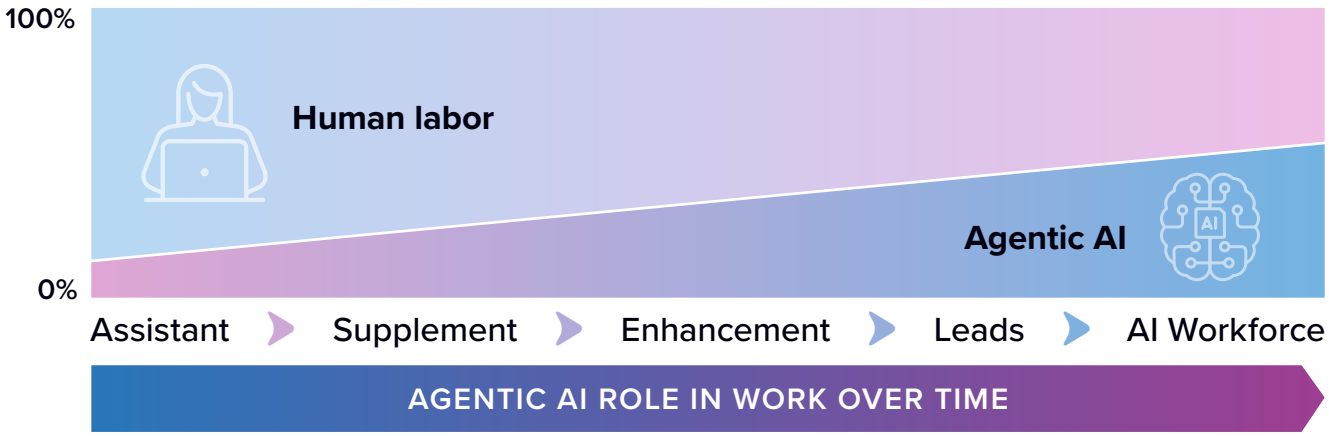
Though similar to the previous technological shifts, the current agentic AI transformation is different in that it significantly affects and, in some cases, eliminates the labor factor of production. It is going to force businesses to rethink the relationship between technology, specifically AI, and their workforce.

IDC has created a five-point digital labor continuum of what this human-AI relationship will look like, illustrating the shift from tool to workforce proxy (see **Figure 3**). Note that not every business or industry will be impacted equally. Likewise, agentic AI will only affect some business processes and workflows because current versions of agentic AI are not as easily adaptable to all business processes. For example, very manual processes such as mechanical repair will see an agentic AI impact in parts sourcing and procurement, but those work processes will not likely see a completely digital workforce for some time. It will also affect different businesses and industries at different speeds because of the nature of the business, customer base, and/or regulatory requirements.

FIGURE 3

The Agentic AI Labor Continuum

(Percentage of work done)



The five stages along the digital labor continuum are:

1. **AI agents serve as assistants:** Agents will serve as assistants or advisors to employees by providing additional information, such as intelligent chatbots or virtual sales advisors.
2. **AI agents supplement human labor:** Agents will supplement human work by taking on minor tasks that are generally tangential to or supplement the normal workflow or business process, such as scheduling meetings or managing emails.

Source: IDC, 2025

What AI will do compared to what people will do will be a constantly pressing question. As job roles and tasks evolve, factoring the calculus of "who" (human or machine) does what into business strategy will be essential.

3. **AI agents enhance human labor:** Agents enhance what an employee is able to do, generally allowing the employee to complete more work (or more complex work) than previously possible, including creating content, personalizing marketing campaigns, and analyzing large amounts of data.

4. **AI agents execute and humans manage:** Agents take on the role of doing a majority of the work, and the human shifts to being a check on the agent to ensure the work is done correctly. In some cases, agents complete most tasks within a workflow, and when an issue falls outside of the normal realm for the agent, it shifts to a person who is an expert. The key is that a human remains in the loop and is still responsible for the decision-making.

5. **AI agents become the primary tools completing the work:** At this point, agents complete most or all of the tasks within a business process, such as customer service triage and resolution, and a human in the loop is only used for exceptions beyond the scope of the agent. These exceptions are used as training models to reduce the number of exceptions that are moved to people.

As industries move along this continuum from left to right, an increasing number of agents will become core to the work being done. What specifically can companies expect to see? IDC expects:

- What AI will do compared to what people will do will be a constantly pressing question. As job roles and tasks evolve, factoring the calculus of "who" (human or machine) does what into business strategy will be essential.
- There will be continuously evolving creative cycles where new job roles are created. As new types of work emerge, so will the corresponding metrics to define work, value, success, and worth, both for people and organizations.
- The measures of value beyond the completion of a task or the sale of a product will shift. As job roles and organizational frameworks change, so will the ways in which business value is created through learning, adaptation, or the curation of knowledge.

This is just the beginning of this shift because 63% of worldwide IT leaders are focusing on integrating agentic AI into existing IT applications and business processes (IDC's *FERS Survey 11,* November 2024). IT providers are enabling this trend by integrating AI into commercial applications to assist IT practitioners in their respective roles.

Understanding an AI-Enabled Workforce

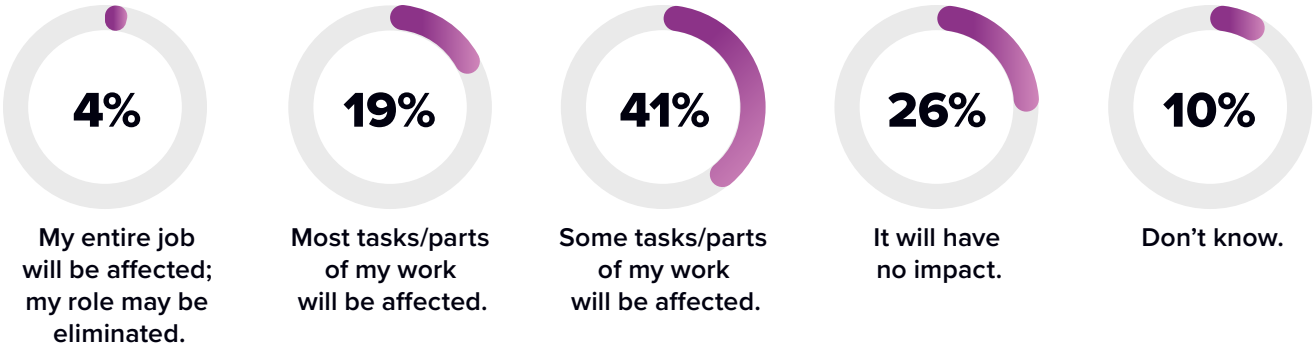
Companies will have a new AI-fueled workforce that employs AI such as machine learning and generative AI but also has AI agents that operate independently of people — planning, using tools, processing information, making decisions, and even remembering. This is going to require a new type of partnership between people and technology.

Workers understand that this change is coming, but what do they expect the change to look like? Over 25% expect that it will have no impact on their jobs, and 41% expect that the adoption of AI tools and technologies will affect only some tasks and parts of their work (see **Figure 4**). This doesn't take into account the new types of roles that the AI revolution will create, including AI data engineers, prompt engineers, AI product managers, AI integrators, AI auditors, robotics engineers, and even AI trainers. The key to these new roles is that they will focus on building a connection between human needs and the capabilities of different forms of AI.

FIGURE 4

The Role That AI Will Play in the Workforce

How much do you expect AI to impact your work in the next year?



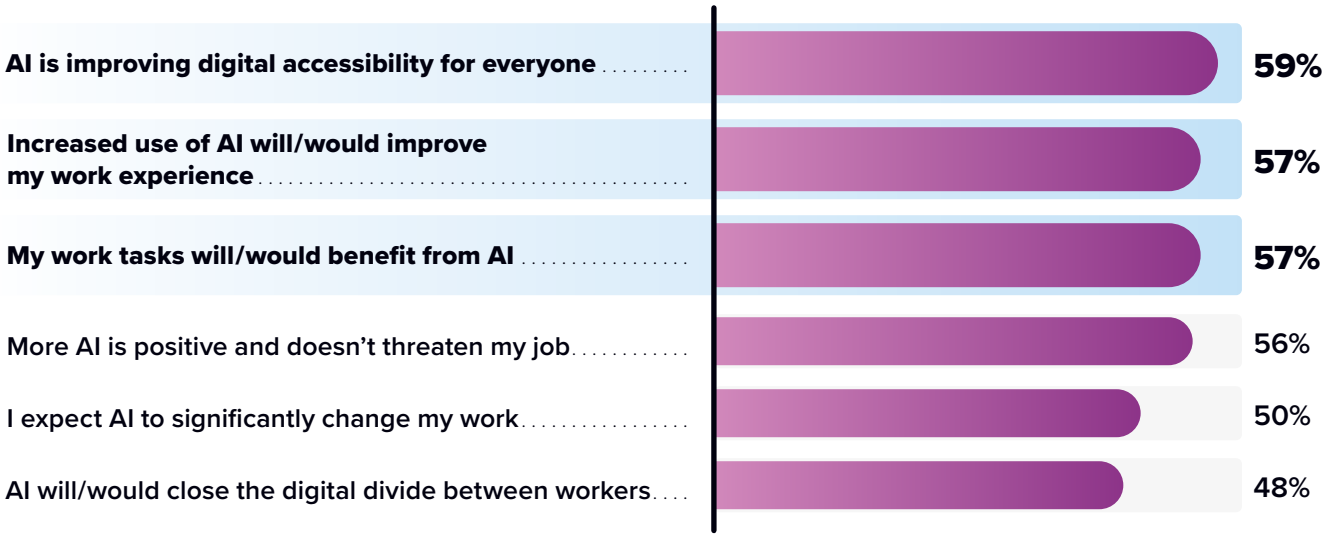
Source: IDC's *Global Employee Experience*, April 2025

Workers also understand and expect that there are a number of upsides to the adoption of AI tools and technologies. For example, 57% of respondents said that the use of AI would improve their work experience, and 57% said it would improve their work tasks (see **Figure 5**). It is also significant that half believe that AI will significantly change their job, and more than half believe that AI is positive and not a threat to their job. It is likely that AI will continue to have the biggest impact on jobs centered on repetitive tasks such as customer service, computer programming, and paralegal research.

FIGURE 5

AI's Impact on the Future of Work

How much do you agree with the following statements about AI's impact on your work?
(Strongly agree or agree)



Source: IDC's *Global Employee Experience*, April 2025

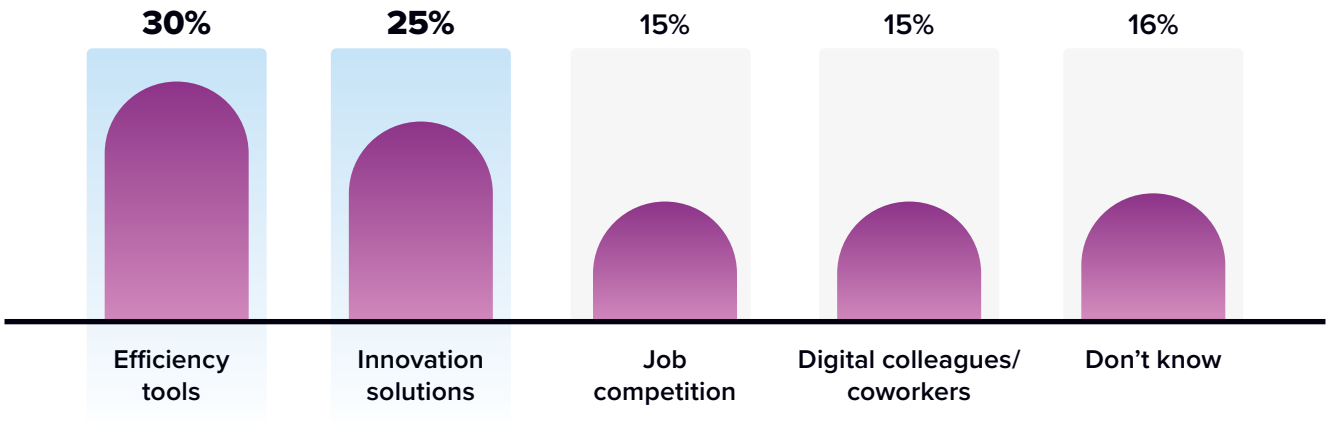
What Makes Agentic AI Different?

Agentic AI is different from predictive AI and even generative AI. The purpose of agentic AI is to achieve an outcome or a set of outcomes through autonomous action and decision-making, and it can adapt as circumstances or data change to complete that task. This is as close to being human-like as software has achieved so far, so it's interesting that, when asked for the primary label that employees would apply specifically to agentic AI, the most common answer (at 30%) was an efficiency tool (see **Figure 6**). Other respondents saw it as either job competition or as a digital coworker.

FIGURE 6

What Role Do Employees Expect Agentic AI to Play?

Which of the following labels would you say most aptly describes AI agent software — software programs powered by large language models that can sense their surroundings, make choices, act, and communicate?



Source: IDC's *Global Employee Experience*, April 2025

The Future Is Digital Labor

Generative and agentic AI have begun to transform the enterprise itself, leading to a new "agentic enterprise" where humans and AI collaborate seamlessly. Traditional AI enables the recognition of patterns through the analysis of data, while GenAI can create new patterns and content across text, images, audio, video, and even code. The next step is agentic AI that can perform autonomous tasks and make decisions. Today, agentic AI assistants work independently and cooperatively with employees to improve business processes and efficiency and more effectively deliver the product or service to the customer, and AI advisors can look at an issue and proactively provide insights and recommendations. Both are being embedded in software applications and business processes across the enterprise, becoming a form of digital labor for the enterprise.

Though an evolving space, a basic definition of digital labor is *"The use of technologies such as AI-based automation, generative AI, and agentic AI agents that both supplement and mimic human decision-making capabilities within a defined context in the completion of a task and then use that experience to gather data to learn and adapt for the next task."*

Using technology that can make human-like decisions can supplement employees and allow them to achieve better outcomes and supplant employees in the completion of certain tasks at rates and speeds that people are not capable of.

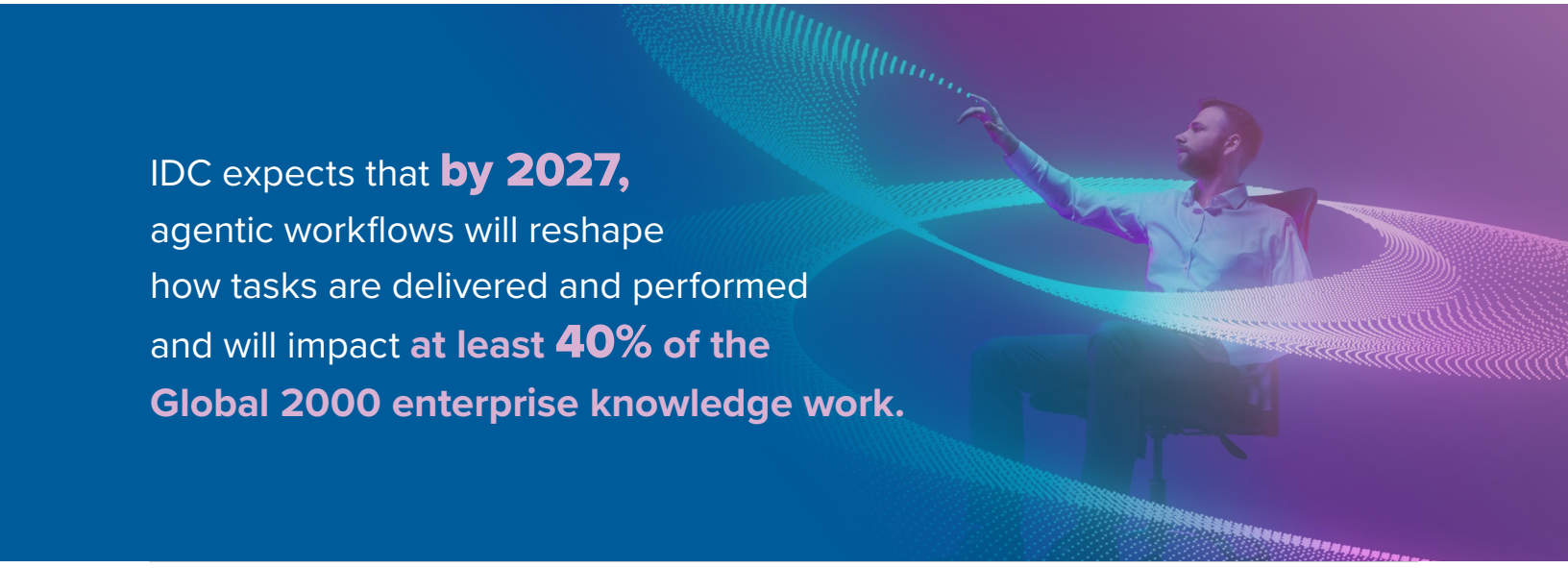
Some leading-edge examples of AI assistants and AI advisors as digital labor include:

- **Marketing** employs a set of agents to monitor the market for a product along with customer feedback and then uses that data to create new types of content and generate new leads.

- **Customer service departments** use a set of agents to respond to a broad but defined set of customer information requests and then channel those requests that they're unable to answer to the appropriate person who can answer the question.
- **Logistics and supply chain managers** employ agents to categorize, track, and ensure that the right components and products are in the right place at the right time. In the future, these same agents will learn from production cycles, facility capabilities, routes, and weather to optimize supply chains and delivery mechanisms.
- **Risk management departments** could use agents to evaluate significant amounts of data, examine relationships between data points and patterns, and use that information to indicate and react to fraud faster than a person could.

This is the first step (2025–2026) of this shift toward an agentic enterprise, during which we can expect experimentation with basic automation and use learnings to expose unintended consequences. There will also be significant agent-driven changes in HR, legal, operations, and other components of the enterprise.

IDC expects that by 2027, agentic workflows will reshape how tasks are delivered and performed and will impact at least 40% of the Global 2000 enterprise knowledge work. In the second phase (2027–2029), the necessary human skills and computer guardrails needed will be refined to create an effective balance between machine and people. In the third phase (2030+), it will be possible to create a self-monitoring and correcting system of dynamic deployment of human and digital labor that is context, skill, and impact aware.



What Companies Need to Focus on in Becoming Agentic Enterprises

There are six areas that companies should be focusing on when adopting agentic AI, enabling digital labor, and transitioning their workforces to be more AI-enabled:

Start with strategy. Though many companies may say they have an AI strategy, they only have an AI wish list or dream. Preparing a strategy for the shift to agentic AI requires five strategic components that overlap and are interconnected. Those five components are:

- What are the short-term (3–6 months), medium-term (6–12 months), and long-term (12–18 months) business objectives that need to be accomplished in implementing agentic AI technologies?
- What is the decisioning framework or structural approach that will be used to decide the best courses of action when it comes to adopting agentic AI?
- What is the universe of potential use cases for agentic AI, how are those use cases valued, and how are they prioritized?
- What metrics and measurements will be used to determine progress and success when implementing agentic technologies?
- How does the company measure and manage risk in this new technological area, and what is the proactive risk management approach that will be used?

Build foundational capabilities. To be successful, agentic AI requires a solid data foundation and infrastructure that supports the continued refreshment of the data foundation. That means that the data that agents use must be clean, easily accessible, and not locked in a silo somewhere. The data should be real time as much as possible. Launch an agentic Center of Excellence to ensure the appropriate guardrails and guidelines for both technological deployment and the inevitable organizational change.

Agents require an ecosystem of technology to function effectively in an enterprise. Start with cloud capabilities and, if necessary, edge computing capabilities.

Create architecture for success. Agents don't exist in a vacuum. Agents require an ecosystem of technology to function effectively in an enterprise. Start with cloud capabilities and, if necessary, edge computing capabilities. It is important to know that this is not a one-time change. As more agents are adopted, business processes will change, and the architecture for the system will need to be updated, along with applications.

Prioritize workflows and business processes. Not every area will be able to transition to agents, nor should it. It is important to understand where the value in a business model comes from and then prioritize areas, tasks, and roles for agent adoption and implementation that have the largest opportunity to drive value while managing risk.

Effectively manage risk. Companies need to take a proactive risk management approach when it comes to agentic AI by building out safeguards, improving transparency, and making sure there is clear governance and accountability.

Manage change. Any existing organization is going to have to manage a change effort because 99.9% of organizations today were not created to be AI-agent first. Change will start at the task level and then shift to the business process level. It will continue to grow until a new business model is created. Executives responsible for change management should think of this as managing a highly interconnected ecosystem of change.

Conclusion

As enterprises stand on the threshold of an era defined by agentic AI and digital labor, the imperative is clear: Organizations must proactively adapt to harness the transformative potential of autonomous AI agents to transition into agentic enterprises. This shift is not merely about technological adoption but about reimagining business processes, workforce roles, and value creation itself. Success will depend on a comprehensive strategy that integrates robust data foundations, evolving architectures, and thoughtful change management. While the journey will be uneven across industries and roles, those who prioritize agility, invest in foundational capabilities, and foster a culture of continuous learning will be best positioned to thrive in the new digital labor landscape.

The rise of agentic AI signals not just an evolution in tools but also a fundamental redefinition of how work is conceived, delivered, and valued in an enterprise.

About the IDC Analysts

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Program Vice President, National Security, Defense, and Intelligence, IDC

Alan Webber is the program vice president for National Security, Defense, and Intelligence in IDC's Government Insights practice. In this role, Webber leads IDC's research efforts around the information and other technologies being employed in national security, defense, and intelligence applications. Specific current areas of research interest for Webber include leveraging intelligent automation and AI/ML augmentation in defense and intelligence (D&I), GenAI applications and defenses, data as a strategic asset, cognitive security, zero trust architectures, building resilient supply chains, modernizing the D&I workforce, vendor and industry support for the D&I mission, and adopting emerging technologies such as robotics, quantum computing, synthetic data, and the space domain.

More about Alan Webber

Crawford Del Prete

President, IDC

Crawford Del Prete was appointed President of IDC in February 2019. Prior to his current role, he served as IDC's Chief Operating Officer. Through his leadership, IDC has established a leading position as the world's most prominent and trusted technology market intelligence provider.

Crawford joined IDC in 1989 as a research analyst. Throughout his IDC career, he has grown multiple IDC businesses to industry leadership positions. He was instrumental in creating IDC's high visibility research and data tracking products which are used daily in the IT industry for strategic planning. Crawford is a leading authority on the IT industry and has completed extensive research on the structure and evolution of the information technology industry. He advises technology and business leaders on how to adapt and change in a time when technology is changing the world.

More about Crawford Del Prete

Amy Loomis, Ph.D.
Research Vice President, Future of Work, IDC

Amy Loomis is research vice president for IDC's Worldwide Future of Work market research service. In this role, Loomis covers the growing influence of technologies such as artificial intelligence, data analytics, robotics, augmented and virtual reality, and intelligent process automation in changing the nature of work. Her research looks at how these technologies influence workers' skills and behaviors, organizational culture, and worker experience and how the workspace itself is enabling the future enterprise.

More about Amy Loomis

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Philip Carter is Group Vice President and General Manager for AI, Data, and Automation research at IDC. In this role, he leads a global team of analysts focused on delivering IDC's research and insights at the intersection of AI, data platforms, and intelligent automation — three foundational areas shaping the future of technology and business. His work is centered on helping C-Suite executives make sense of the rapid innovation in the AI space, and drive meaningful transformation through data- and intelligence-led strategies.

More about Philip Carter

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