Google Cloud

The agentic shift

The new frontier of enterprise growth

Research insights by

IDC

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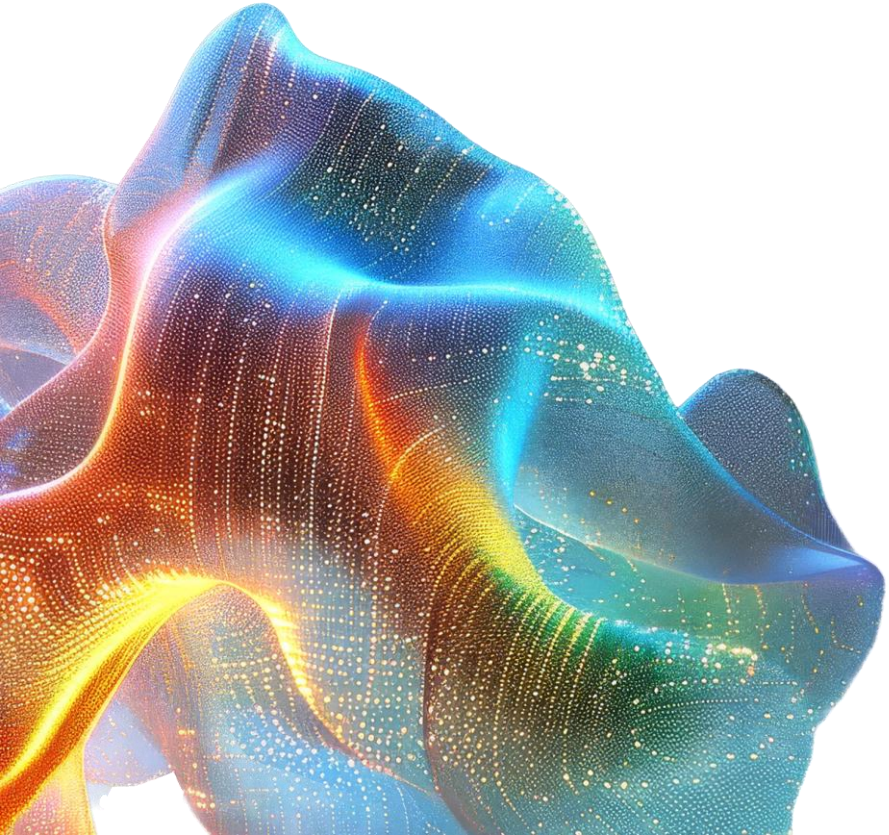


Foreword

Some shifts in enterprise tech are incremental. Others redefine the rules. Agentic AI is the latter.

For years, we've talked about digital transformation—using AI to boost efficiency, cut costs, maybe reimagine a few workflows. But with agentic AI, we're entering a new phase: one where AI doesn't just support decisions, but drives them.

This is intelligence that can observe, reason, and act. It enables autonomy at scale—and it's changing how leaders think about technology, operations, and value creation itself.

We're also seeing a shift in how people engage with that intelligence. From desktop to mobile to Gemini Enterprise—a new environment where AI agents live. Not just embedded in apps, but operating across them: understanding goals, planning, and executing tasks. And with the rise of agent SDKs—software kits that give developers the tools to build, train, and deploy intelligent agents—developers can now build and scale these agents faster, powering a new wave of enterprise automation.

At Google Cloud, we're working with CxOs across Asia Pacific who are already on this journey. What's clear is this: success in the agentic era demands more than just smart models. It takes a unified foundation—where infrastructure, data, and AI come together seamlessly. That's exactly what we've built: a secure, enterprise-grade stack trusted globally, backed by world-class partners, and powered by AI innovation that's reshaping industries today.

The IDC *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google Cloud, surveyed 950 organizations across the region. It offers a timely look at how businesses are adopting generative AI (gen AI)—and preparing for what comes next. I hope it not only informs, but inspires. Because the question isn't whether AI will change your business—but how you'll lead that change.

Mitesh Agarwal
Managing Director, Architecture & Technology
Google Cloud, Asia Pacific

"Success in the agentic era demands more than just smart models. It takes a unified foundation. One where infrastructure, data, and AI come together seamlessly."

Executive summary

Across the world, CEOs seek competitive advantage, CIOs architect scalable platforms, CFOs demand measurable ROI, CHROs prepare the workforce for what's next, COOs pursue operational agility, and CMOs aim to personalize at scale. Generative AI (gen AI) will dramatically change how the C-suite works. Gen AI is no longer a futuristic concept; it is a strategic imperative. Combined with the shift toward agentic AI, where autonomous systems act intelligently in some context, gen AI heralds a new chapter in enterprise transformation.

But questions remain: **how do you lead responsibly, scale intelligently, and invest strategically?** This eBook explores adoption trends, and effective leadership strategies for gen AI success in Asia Pacific—and offers a blueprint for C-suite leaders to lead with purpose in this new world.

From gen AI implementation to agentic AI at scale, organizations are entering a new frontier of enterprise growth, where agility, innovation, and ROI converge. For CxOs, the path to sustainable advantage lies in bold tech choices, empowered talent, and trusted platforms that scale autonomy with purpose. Those who lead with vision today will define the competitive edge of tomorrow, and succeed.

01

AI success path: Evolve with agentic AI

For today's C-suite, the mandate goes beyond digital transformation—it is about enabling intelligent autonomy. Agentic AI delivers proactive decisioning and automates workflow. Those who adapt fast, lead decisively.

02

Invest in AI foundation: Security and data

CIOs and CISOs know this: AI is only as strong as its foundation. Trusted data, secure pipelines, and compliance-first infrastructure unlock scale, resilience, and boardroom confidence.

03

Ensure AI impact: Build AI skills

AI is not just an IT project—it is a capability. Forward-looking CxOs invest in people, empowering teams with AI fluency to drive innovation, not just run operations.

04

Adaptive AI platform: Engage partners with a long-term vision

AI partners can help organizations achieve their goals. Choosing platforms that offer end-to-end orchestration, continuous innovation, and ecosystem depth helps drive sustained impact.

Agentic AI turns enterprise goals into reality

AI agents' reasoning power transforms strategic business goals into high-impact, self-driving outcomes.

IDC research shows organizations are expanding AI use from narrow cases to strategic priorities—driving innovation, agility, and growth. Agentic AI accelerates this by turning complex goals into actions, automating decisions, boosting responsiveness, and enhancing experiences. It converts gen AI's intent into impact, helping enterprises scale and lead with speed.

Organizations' AI objectives for initiating AI projects

What is possible with agentic AI

- Agents scan market trends, suggest new product ideas, run quick product-or-service simulations, and prepare a prototype brief overnight.
- Smart service bots predict what customers need, fix issues on the spot, and personalize offers—no endless hand-offs.
- AI helpers handle tasks, fill routine forms, and schedule shifts, freeing employees to tackle bigger, more creative challenges.
- Agents instantly adjust suppliers, inventory, and prices when demand or risks change, keeping operations smooth.
- Sales agents fine-tune pricing, spot cross-sell chances, and renegotiate supplier rates to boost margins.

Key takeaways

- **Position agentic AI at the enterprise core:** Go beyond automation to intelligent orchestration by aligning AI with key business functions. Agentic AI reasons, creates sub-tasks, and activates hidden processes to autonomously drive outcomes.
- **Empower AI to decide and act:** Rethink how value is created—agentic AI transforms business objectives into executable strategies, enabling real-time decision making and autonomous action to unlock innovation, growth, and competitive advantage.

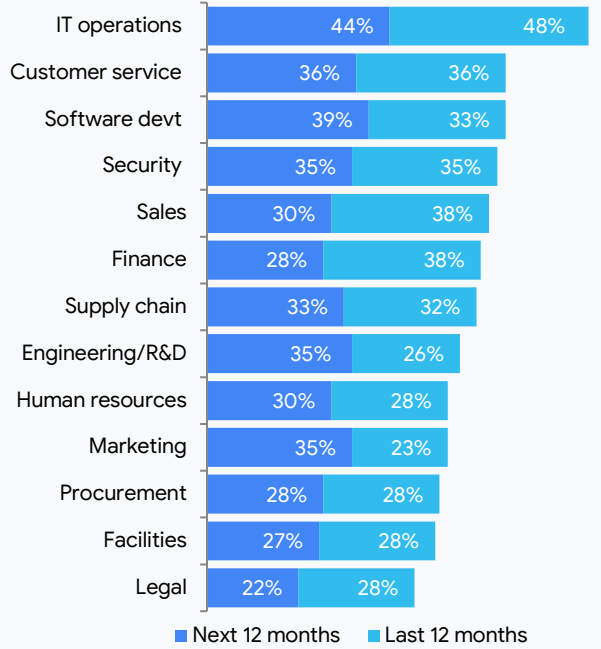
Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = 950

Agentic AI unlocks more sophisticated use cases

Advanced use cases emerge as organizations expand gen AI capabilities and embed agentic AI.

Asia Pacific organizations are rapidly scaling gen AI across enterprise functions—from IT operations and software development to engineering, marketing, and HR—moving from experimentation to value realization, while increasingly identifying mission-critical use cases for their lines of business.

Gen AI use case adoption by business functions



Industry	Planned gen AI use cases in next 12 months	Implemented
Manufacturing	Energy and resource efficiency	**54%**
Retail	Pricing and merchandising strategy	**47%**
Financial services	Fraud detection and risk management	**52%**
Public sector	Economic policy and financial governance	**54%**
Telecommunications	Revenue management and pricing strategy	**52%**
Media & entertainment	Content creation and production	**53%**
Gaming	Game asset creation with limited coding skills	**60%**

Key takeaways

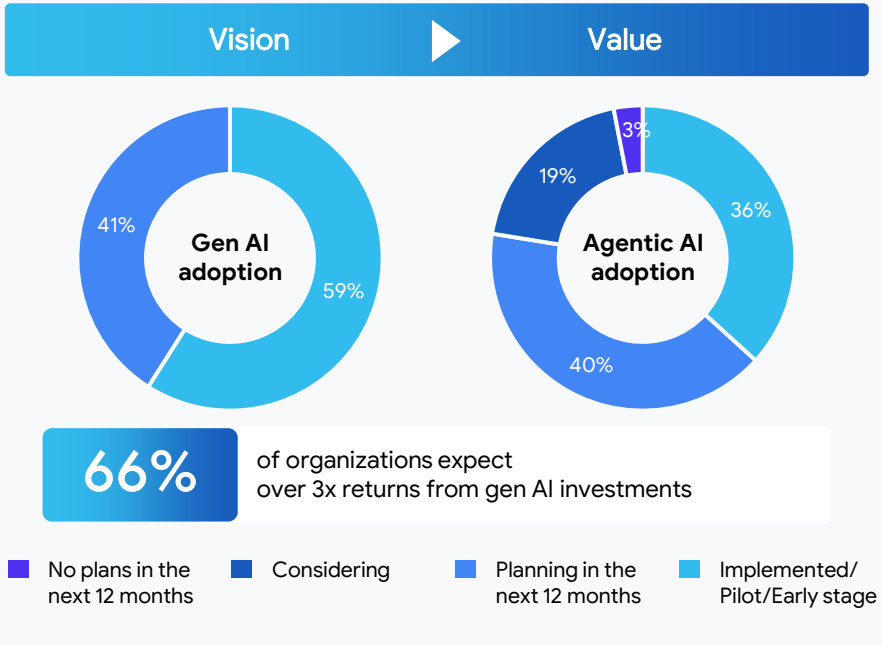
- **Elevate use cases from tasks to outcomes:** Agentic AI evolves content creation into autonomous campaign orchestration—planning, executing, and optimizing.
- **Enable autonomous, context-aware execution:** In product development, agents interpret requirements, simulate designs, and iterate with minimal human input.
- **Built for scalable, multi-agent collaboration:** In supply chains, agents dynamically resolve disruptions, align logistics, and adapt procurement strategies in real time.

Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = 950

AI success path

Gen AI fuels agentic AI to create intelligent systems, accelerate innovation, and drive next-level transformation.

Organizations are rapidly evolving from traditional AI to gen AI. The next stage will be agentic AI—enabling autonomous decision making and contextual intelligence at scale. As they mature in their use of gen AI, organizations will expect higher ROI by integrating agentic capabilities. Agentic AI takes gen AI further—turning strategic vision into real, autonomous outcomes that drive measurable business value. The IDC study predicts that by 2025, about **76%** of Asia Pacific organizations will implement agentic AI use cases across functions.



Key takeaways

- **Agentic AI is an evolution, not a revolution:** Agentic AI builds on gen AI foundations—advancing autonomy, adaptability, and context awareness without disrupting existing systems.
- **Business-driven, not just tech-driven:** Strong gen AI ROI accelerates agentic AI adoption. Identifying the right agentic AI use cases will bring higher ROI, and fuel your next wave of enterprise transformation.
- **Success isn't adoption; it's acceleration:** From experimentation to execution, high-impact use cases fuel momentum, transforming AI from a cost center into a strategic growth engine.
- **AI maturity = competitive advantage:** Enterprises that integrate multiple AI modalities are building smarter, more adaptive systems, unlocking greater agility, ROI, and long-term differentiation.

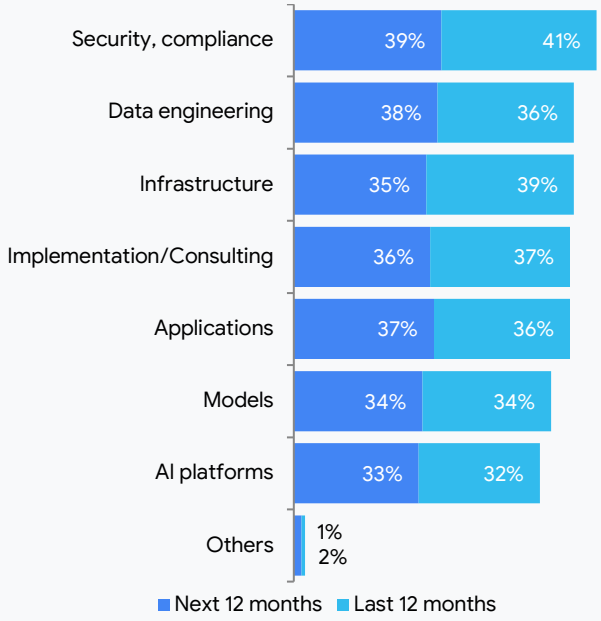
Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = 950

Investing in AI foundation: Security

Securing generative AI at scale demands resilient architecture, trusted data, and autonomous threat response.

Security and compliance remain the top AI investment priority for the C-suite for at least the coming year, reflecting rising regulatory pressures and escalating cyber threats. This means proactively developing robust, AI-driven security and compliance is non-negotiable, as this safeguards business value, customer trust, and future growth as AI adoption accelerates.

Investment areas for AI



Role of security and compliance in building future-ready agentic workflow*

- **Mitigate autonomy exploits:** Without proper guardrails, AI agents acting independently can trigger data leaks or unauthorized access.
- **Secure dynamic interactions:** Agentic workflows interacting across APIs or systems can introduce stealthy threat surfaces if unchecked.
- **Embed oversight protocols:** Always-on human governance is vital to ensure agent behavior aligns with compliance and ethics mandates.
- **Engineer for trust:** Transparent logic flows and explainable actions build enterprise confidence in autonomous decision making.

*Source: *IDC Agentic AI in Cybersecurity: A Primer Guide for Cybersecurity Architects,* Jun 2025; *IDC RSAC Conference 2025: Agentic AI and a Continued Move Toward Integration Emerge as Key Themes*

Key takeaways

- **Secure from the ground up:** Choose AI platforms with embedded security at the model, data, and infrastructure layers to future-proof innovation.
- **Adapt security to autonomous agents:** Evolve governance and threat models to anticipate risks from self-directed AI agents operating in complex environments.
- **Make trust a core capability:** Invest in explainability, traceability, and compliance by design to ensure every AI outcome is accountable and auditable.

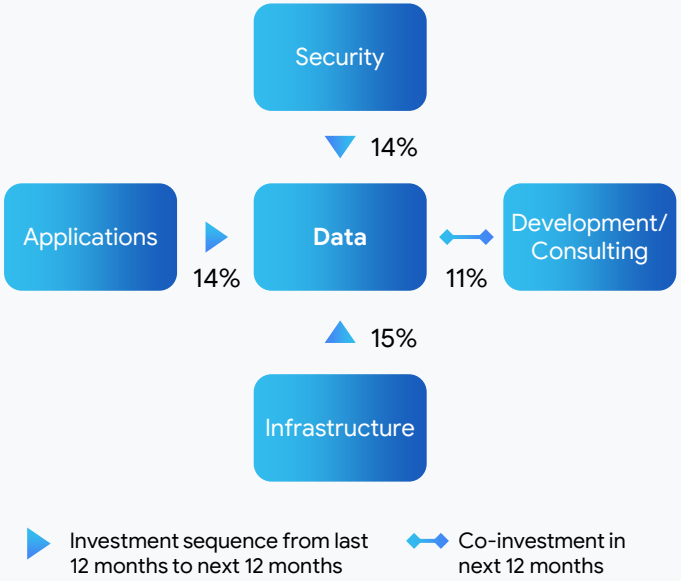
Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = 950

Investing in AI foundation: Data

Prioritize high-quality, well-governed data pipelines to maximize generative AI ROI and accelerate agentic AI.

Data engineering ranked fourth for AI investments in the last 12 months but now is second only to security for the year ahead. This acknowledges data engineering's importance in supporting other AI investments.

AI investment flow: Data as the hub of investment portfolio



Flexing AI investment to data engineering

- **From security to data:** AI security investments have exposed data governance gaps, underscoring the need for stronger data engineering to secure AI use.
- **From AI applications to AI-ready data:** AI tools, including agentic ones, flounder without high-quality data. This fuels the need to modernize infrastructures with data lakehouse, data mesh, and scalable data platforms.
- **From AI infrastructure to advanced data solutions:** GPU/TPU investments revealed data-compute bottlenecks, prompting further investments in advanced data solutions to optimize these AI resources.
- **AI implementation/consulting with data:** Aligning AI with business needs requires redesigned data models—making integrated data-AI execution more cost-efficient and outcome-driven.

Key takeaways

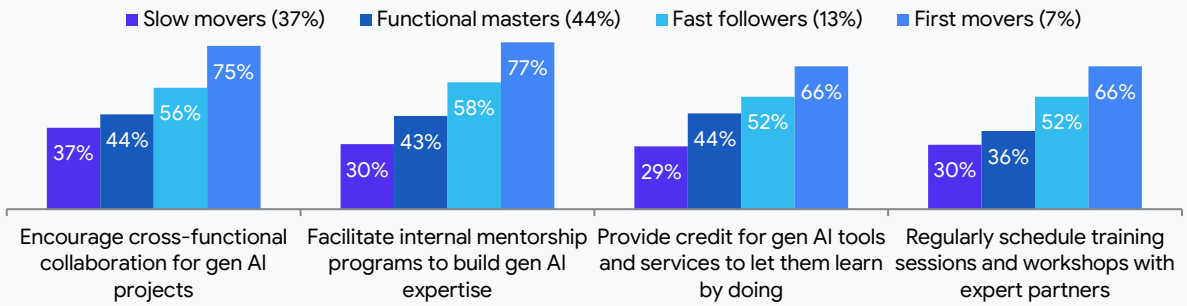
- **Modernize data first, scale AI faster:** Robust data infrastructure is the backbone of AI; without it, AI remains fragmented, biased, and unscalable.
- **Fuel agentic AI with intelligent data:** Future-ready data platforms power self-learning systems, unlocking continuous innovation and competitive advantage.

Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = 950

Build skills to power AI success

Empower talent with AI fluency to transform innovation into impact.

IDC analyzed functional and industry-specific gen AI use cases adopted in the past year and those planned for next year. Cluster analysis suggests four enterprise archetypes—**first movers** who invest heavily in AI skills and produce the highest AI performance. At the other extreme are **slow movers**, whose low investment in skills leads to low AI performance. (Refer to Appendix 1 for detailed features of these four clusters.)



Traits of first mover – AI success track

High investment in AI skills program

- Top in cross-functional collaboration
- Top in gen AI mentorship
- Top in providing gen AI training
- Top in providing credits for AI tools

High AI performance

- 3.5x ROI on average—the highest segment
- Highest (59.4%) adoption of agentic AI
- Highest gen AI project success rate (54% reported more than 80% success)

Proactive, deliberate strategy to invest in AI talent is essential to building the capability needed to lead with agentic AI.

Key takeaways

- **Modernization unsupported by gen AI talent is a recipe for failure:** AI platform upgrades will fail without skilled teams. Skills development investments fuel AI-driven transformation.
- **People are your gen AI force multiplier:** Human-agent collaboration will be a key feature of the agentic AI era. Upskilling with intent, and building cross-functional collaboration create real value from your agentic AI investment.
- **Strategy + Execution = Gen AI Leadership:** Leading enterprises align AI investments with a clear organization-wide vision.

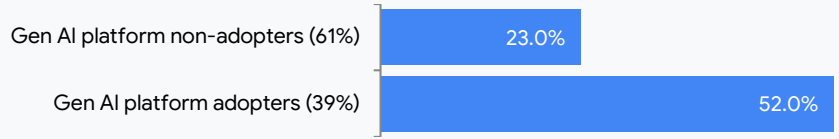
Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = 950

Trusted generative AI platforms help scale agentic workflows

Accelerate business value by scaling agentic workflows on secure, enterprise-grade generative AI platforms.

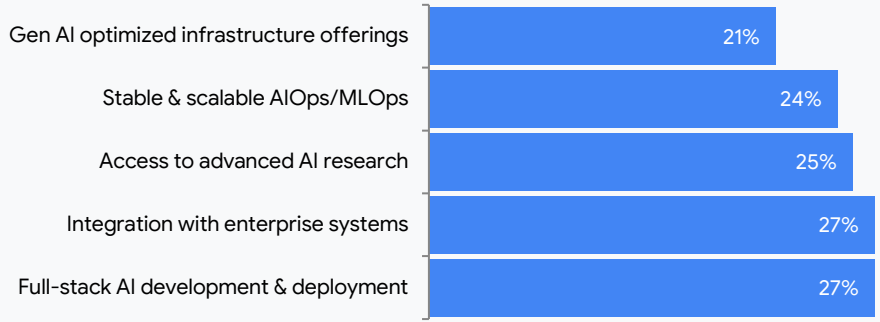
Platforms matter. IDC analysis reveals that firms with gen AI platforms are nearly twice as likely to deploy agentic AI in production—gaining efficiency, speed, customer experience, and competitiveness. This is hardly surprising as such platforms accelerate agentic workflow implementation by securely integrating models, data, and orchestration at scale. Platforms move businesses forward—beyond experimentation and pilot fatigue—unlocking autonomous workflows that deliver measurable, real-world outcomes, empowering C-suite to drive innovation and operational efficiency with confidence.

Deployed agentic AI in production



* N = 504

Top 5 gen AI platform selection criteria



Key takeaways

- **Move beyond pilots and industrialize gen AI with platforms:** Platform adopters scale faster by turning experiments into autonomous workflows, leaving laggards trailing behind in the AI maturity curve.
- **Invest in vendors with full-stack AI capabilities:** Early gen AI leaders choose platforms with end-to-end capabilities—from development to deployment—to scale intelligently and securely.
- **Bridge the execution gap with ecosystem-ready platforms:** Platforms that integrate seamlessly with enterprise systems eliminate operational friction and accelerate gen AI adoption.
- **Choose strategic partners, not just an AI vendor:** Your gen AI success hinges on who you build with. Engage with platform providers with deep AI expertise, R&D strength, and a proven record in enterprise delivery.

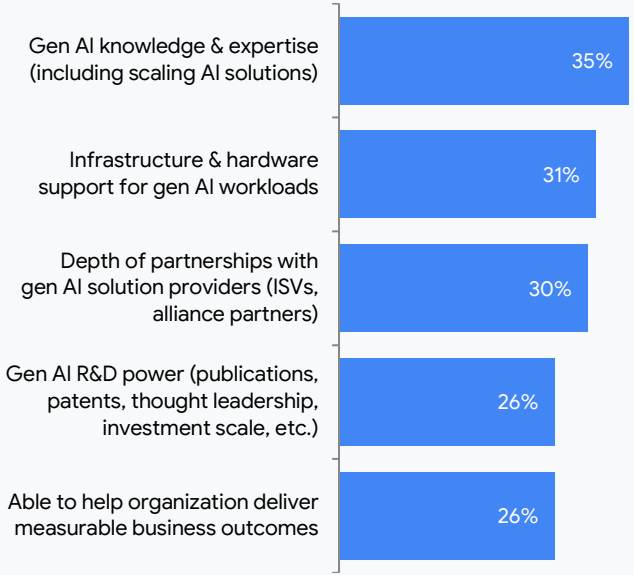
Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = 950

Build generative AI partnership with a long-term vision

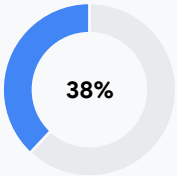
Forge strategic generative AI alliances that scale innovation, accelerate impact, and future-proof the business.

Organizations tend to select partners with deep expertise, execution strength, and ecosystem breadth to bridge capability gaps and scale enterprise impact. They increasingly prefer full-stack AI solution vendors that offer models, tools, infrastructure, and governance in one platform to accelerate adoption, ensure interoperability, and future-proof their innovation. Strategic alignment with such partners enables long-term value creation, continuous optimization, and faster time to trusted gen AI outcomes.

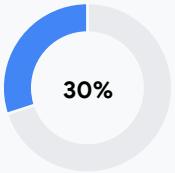
Top 5 generative AI partner selection criteria



Type of gen AI vendor organizations prefer to partner with



Full-stack AI solution vendor



Cloud service provider

Key takeaways

Look for partners with proven credibility in:

- **Knowledge and expertise:** Partners providing consulting services with deep understanding of business, industry, roadmap design, AI skilling, and operational models.
- **Implementation skills:** Partners experienced in technology deployment, and offer infrastructure support .
- **Right ecosystem:** To optimize real ROI from your gen AI investment, work with vendors with a well-developed ecosystem across the gen AI stack.

Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = 950

Charting the future

Your agentic AI playbook.

01

Lead with purpose, not just performance

Agentic AI redefines leadership. It drives value by embedding autonomy, ethics, and intent into enterprise decision making.

02

Invest in secure, scalable AI foundations

Success demands trusted data, compliant architecture, and resilient pipelines that can evolve with AI complexity.

03

Build AI fluency across the organization

Upskill talent beyond IT; empower every function to co-create innovation through intelligent systems.

04

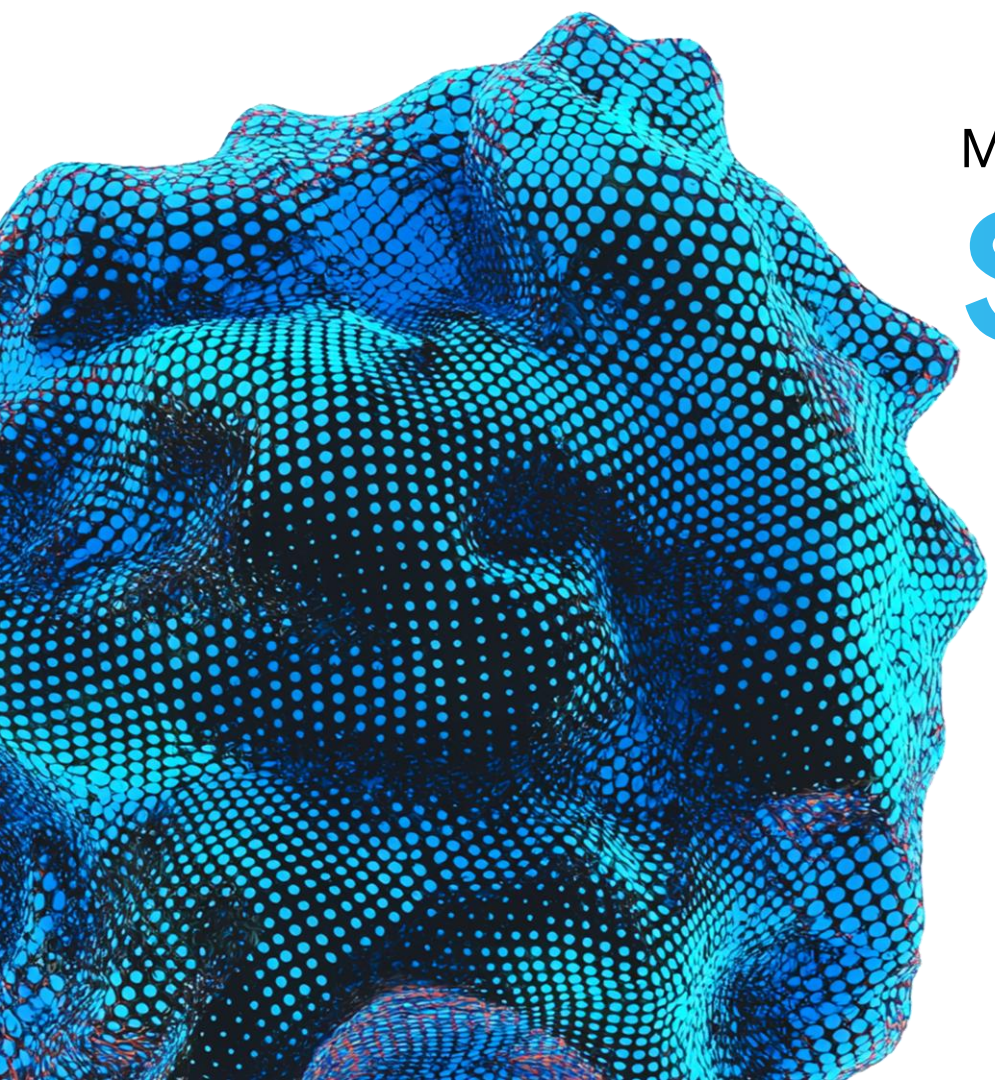
Adopt adaptive platforms for agentic execution

Choose full-stack AI platforms that support orchestration, model evolution, and dynamic agent-driven workflows.

05

Align use cases to strategic impact

Don't just chase automation—design agentic AI use cases that proactively shape business models and industry outcomes, and deliver real business value.



Market Insights

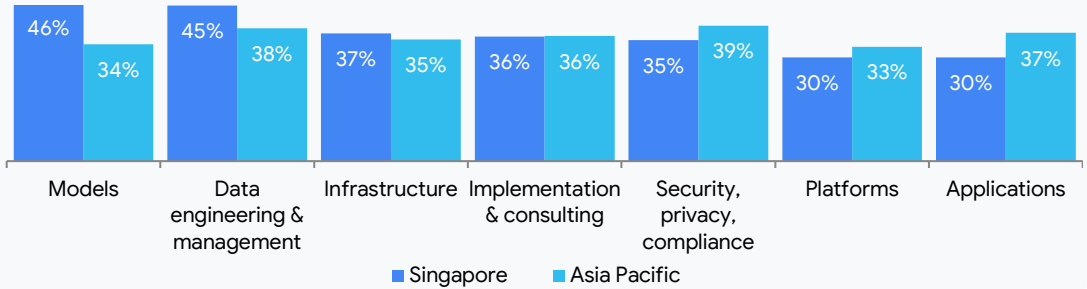
Singapore

Singapore's gen AI journey: scaling smartly toward growth

Focused, strategic investments drive generative AI adoption, anchored by realistic near-term ROI expectations.

Singapore's C-suite have progressed gen AI beyond the pilot phase. It is now a strategic enabler of the country's Smart Nation goals and long-term competitiveness. Organizations are running a larger number of PoCs than their Asia Pacific counterparts and are fast tracking the transition to production. There is a strong national focus on AI innovation, improving customer experience, and business growth, with organizations spending more on AI—to as much as **40% of IT budgets.**

AI investment for next 12 months



Key motivators of AI projects

There is growing emphasis on agentic AI

Agentic AI is enabling autonomous decisions, simplifying complex operations, and elevating Singapore to the forefront of responsible, scalable AI transformation. Organizations are strategically investing in AI foundations—particularly advanced models, data engineering, and infrastructure—to support the development of autonomous, context-aware AI systems. This can unlock real enterprise value, resulting in greater ROI, and positioning themselves ahead of their regional peers.

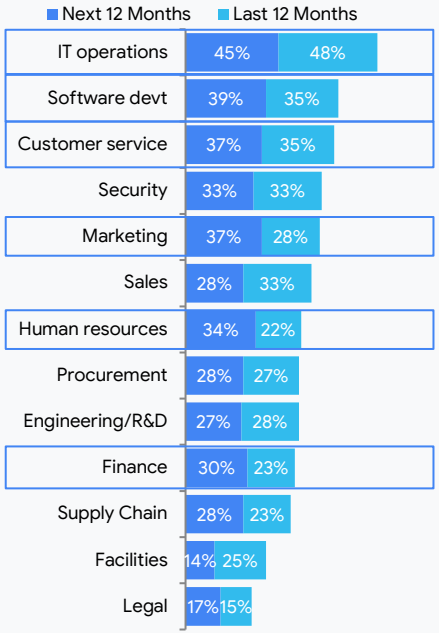
Agentic AI adoption in Singapore

Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = Singapore 100

From adoption to autonomy: Scaling agentic AI enterprise-wide

Singapore enterprises are moving beyond gen AI pilots, embedding agentic AI into core business functions to accelerate impact and enterprise-wide transformation. Many believe Agentic AI will help them attain their goals across business functions. For example, 58% believe that integrating agentic AI into the customer service function will help improve financial KPIs, and 50% expect to improve customer service and customer retention.

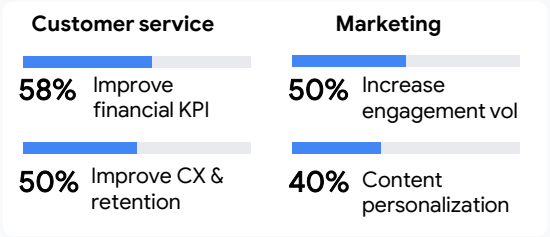
Gen AI use case adoption by functional areas



Gradual adoption of own/proprietary model

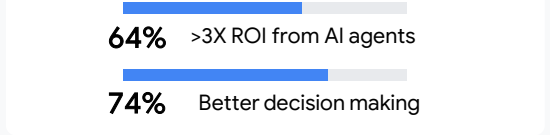
- **IT operations**: Mostly embedding gen AI within DevOps, end-user experience, and contact center applications.
- **Software development**: Customizing existing gen AI application to suit specific business needs in customer service and development use cases.
- **Customer service**: Building their own gen AI platform for customer communication and engagement, and service performance use cases.
- **Marketing**: Investing in own gen AI, or customized application for content marketing use cases; embedding gen AI in existing marketing operations applications
- **Human resources**: Embedding gen AI for strategic HR and workforce analytics applications; using customized gen AI or building own gen AI applications for enhanced HR delivery and employee experience use cases.
- **Finance**: Using own gen AI application for accounts receivable and expense management; customized or embedded gen AI for treasury and risk management, and AR applications.

Key goals for integrating AI agents across business functions



Source: IDC's *FERS Study,* Wave 1, Feb 2025, n = Singapore 30

Agentic AI ROI & benefit



Source: IDC's *Asia/Pacific Agentic AI Survey, 2025,* n = Singapore 50

Key takeaway

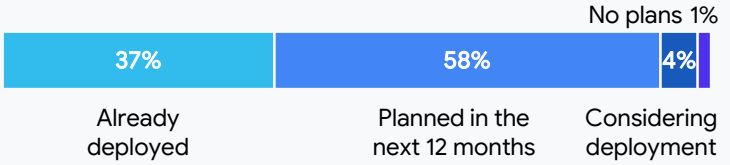
Empower core business function with AI by developing domain-specific applications that deliver autonomy, hasten execution, and generate measurable business outcomes.

Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = Singapore 100

Singapore's pragmatic leap forward: Accelerating generative AI outcomes with agentic AI

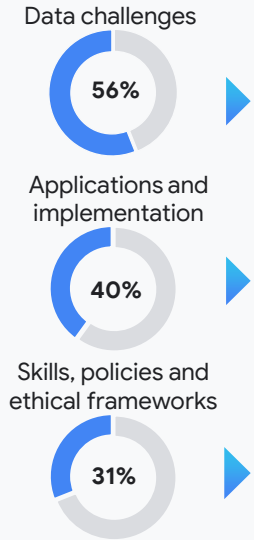
Harness Agentic AI to turn data silos, skills gaps, and governance hurdles into drivers of scalable, intelligent transformation.

Agentic AI Adoption in Singapore



Agentic AI use cases organizations plan to deploy next year	
Reflection: Make LLM self-evaluate its response and fix and retry prompts until it meets certain quality thresholds	61%
Planning: Use LLM to suggest step-by-step plan to achieve some goals	60%
Multi-agent collaboration: Connect two or more agents to split tasks or discuss ideas for a solution,	40%
Tool use: Integrate agents with other tools such as web scraping, calculators, analytics/ML models	60%

AI implementation challenges



Agentic AI: Advancing beyond gen AI implementation barriers

Leverage smart data curation agents
AI agents autonomously source, clean, and validate enterprise data, thus resolving data quality issues while enabling secure, compliant access across business units.

Harness AI-enabled co-developer agents
Integrated into AI platforms, these agents support low-code application development, model tuning, and infrastructure orchestration, all helping to fast-track deployment while minimizing reliance on scarce technical talent.

Consider deploying strategic alignment agents
These agents embed organizational OKRs and regulatory constraints into model behavior, ensuring AI decisions align with enterprise goals, governance, and ethical frameworks.

Key takeaway

Agentic AI can help address the challenges in your AI/gen AI implementation, plan your next move, develop a cross-functional approach, and identify the right tool and platform that support your goals. Adherence to local governance policies are as crucial as your data strategy. Build AI systems to operate within regulatory framework, scale across business functions, and deliver real business outcomes.

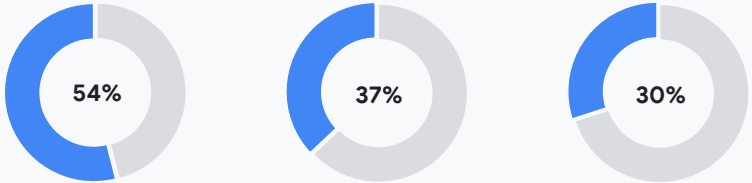
Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = Singapore 100

Selecting for scale

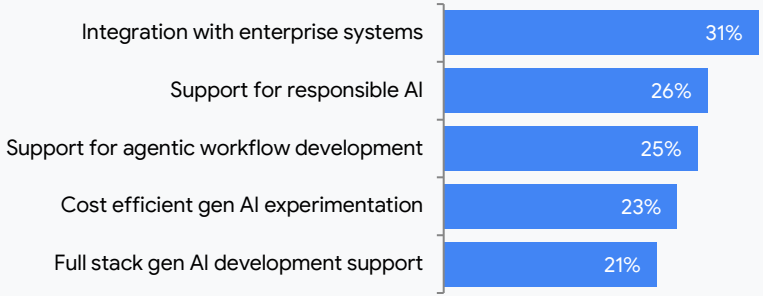
Generative AI platforms that power autonomy.

Success in adopting gen AI starts with the right partner—one that enables secure integration, autonomous workflows, and enterprise-grade scalability.

Preferred gen AI vendor type



Top 5 gen AI platform selection criteria

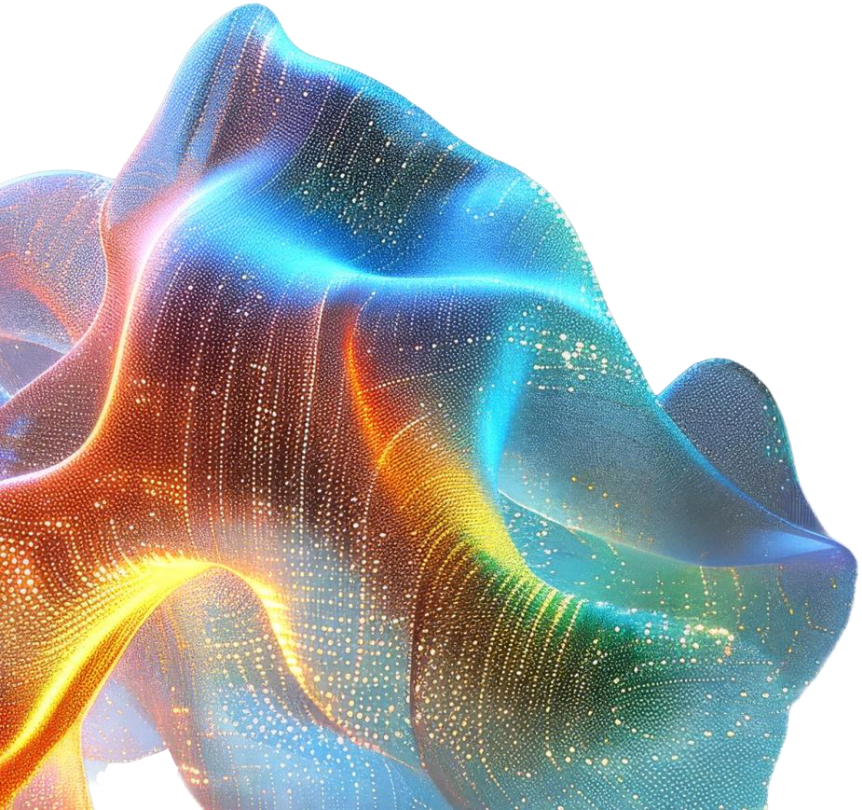


Five key takeaways for Singapore business and IT leaders

1. **Prioritize seamless enterprise integration**
   Singapore is a tightly regulated, world-leading financial and business hub. C-suite should adopt gen AI platforms that integrate seamlessly into existing IT ecosystems, and seek solutions that accelerate value without compromising compliance, control, or operational continuity.
2. **Choose platforms that align with responsible AI**
   With a strong national emphasis on AI ethics and governance, platforms must embed transparency, traceability, and compliance—aligned with frameworks like the Infocomm Media Development Authority's AI Verify—to build stakeholder trust and ensure long-term viability.
3. **Agentic AI needs native workflow orchestration**
   As businesses move from experimentation to autonomy, they need vendors that support real-time agent collaboration, continuous learning, and contextual decision making at scale.
4. **Enable scalable, lean innovation**
   Singapore's pragmatic approach to gen AI values rapid, repeatable, value-driven PoC-to production cycles. This calls for platforms that iterate fast, and cost effectively.
5. **Back ambition with full-stack capability**
   To achieve Singapore's AI self-sufficiency aspiration, organizations should work with vendors that bring deep R&D expertise, model tuning, and custom support.

Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = Singapore 100

Appendix



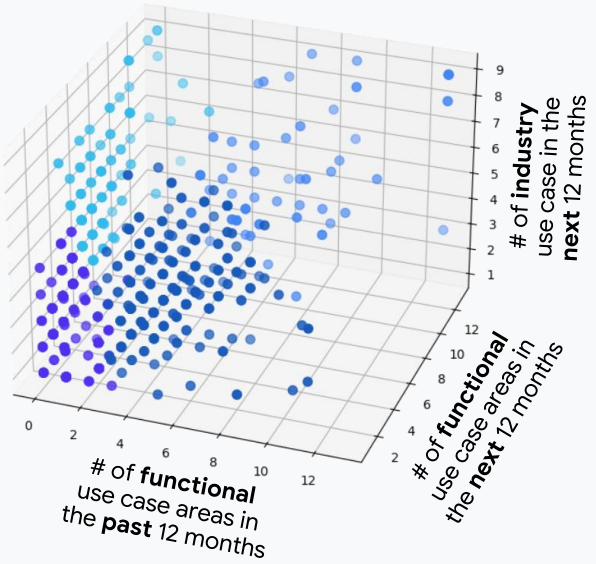
Appendix 1: Generative AI use case clustering

Appendix 2: Research methodology

The four patterns of generative AI use case adoption

IDC's cluster analysis reveals four distinct AI use case adoption patterns among Asia Pacific organizations. Each pattern reflects unique attitudes toward AI and gen AI, shaped by the state of functional and industry-specific adoption, and future plans. Notably, first movers also emerged as the best performers.

Use case adoption clustering



	Gen AI performance	Agentic AI adoption	Deployment challenge
First mover (7%) Biggest data engineering investor; deploys diverse functional and industry use cases	~3.5X ROI with 81% project success	59.4%	**Strategy:** Aligning AI investments to business goals
Fast follower (13%) Begins to expand functional and industry use cases	~3.1X ROI with 76% project success	13.3%	**Data:** Quality and management of data
Functional master (44%) Focused on functional, not industry use cases	~3.1X ROI with 81% project success	48.8%	**Data:** Quality and management of data
Slow mover (37%) Maintains only a few functional and industry use cases	~2.6X ROI with 77% project success	23%	**Data:** Quality and management of data

Source: IDC's *Asia Pacific Generative AI Adoption Study 2025*, commissioned by Google, n = 950

Methodology

This survey was conducted in early 2025 to understand how organizations in the Asia Pacific region are adopting AI.

IDC asked 950 IT and business leaders across the region about their reasons for pursuing AI, areas of AI-related investment, most adopted gen AI use cases, AI project success factors and challenges, and preferred types of partnerships.

Based on this large-scale survey and IDC research, the study reveals a dynamic and diverse pattern of AI transformations being undertaken by organizations in APAC. These data and insights will help organizations better determine the next steps in their AI journey.

IDC's Asia Pacific Generative AI Adoption Study 2025, commissioned by Google Cloud (n = 950)

By country	
Australia	100
Japan	100
South Korea	150
China	100
Taiwan	100
Indonesia	100
Singapore	100
India	100
Rest of JAPAC	100

By organization size	
Less than 1,000 employees	321
1,000 to 4,999 employees	325
5,000+ employees	304

By role	
CEO/Owner	193
Vice President/ Executive	346
General Manager	411

By function	
IT	504
Non-IT	446

By industry	
Financial services	150
Telecom	50
Media/ Entertainment/ Gaming	100
Manufacturing	250
Distribution	250
Public sector	150

Note: All data in this report is sourced from the above survey unless another source is mentioned.

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