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MODERN ENTERPRISE IT - FROM THE EDGE TO THE CORE TO THE CLOUD

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THE CIO MANDATE: BALANCING INNOVATION AND RESILIENCE



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The worst of times and very little best of times?!

▶ MY ADAPTATION OF THE OPENING LINE OF Charles Dickens's 'A Tale of Two Cities' is perhaps overly pessimistic. However, as we now seem to have entered an era where the tech giants continue to act with the utmost speed and diligence to ensure that digital footage of big money sporting events is forensically removed from social media platforms at the same time as they appear to be untroubled by the use of their technology to 'digitally strip' women and children, then I think I am entitled to imagine that the technology glass is half empty as we enter 2026.

Yes, of course, the technology genie can never be put back in the bottle, but it can, and should, be robustly and even-handedly regulated, no argument. Sadly, as of now, the concept of 'might is right' is gaining depressing momentum, whether in the political or, seemingly inextricably linked, technology arenas. There is time for the increasingly dispossessed majority to act, but this time is rapidly running out. I can hardly believe that I am writing these words... but many governments across the globe are already so committed to a very small group of all-powerful tech giants that, if these companies ever decided (or, as likely, were pressured to decide) to withdraw their services, global chaos would ensue at a level which would make the global financial crash of 2008 seem like barely a ripple. That is the reality of the world in which governments and businesses now operate.

Don't believe me? Well, in recent days, the attempts to ensure a minimum global tax rate – primarily designed to prevent the tech giants from making huge profits in many countries but paying comically low taxes in comparison – have failed. Similarly ineffective, with a handful of exceptions, seem to be the attempts to regulate AI and the same giants that have developed and provide these services across the globe. We are told that they must be allowed to access any and all data with scant regard for copyright ownership 'for the good of humanity'. A shallow argument which falls over once we all start thinking of the actions we could all seek to justify by this subjective



and flimsiest of defences, with anarchy the guaranteed outcome.

The blame for this current situation lies with us all. Governments have been too supine and not wary enough of 'Greeks bearing gifts'; and the vast majority of global citizens have been far too ready to embrace the apparent convenience and value of digital offerings – with many, if not all, even now still failing to understand the ultimate connection between today's digital and increasingly disenfranchised worlds.

Yes, the positives of digital technology, with AI its current flagbearer, are tremendous, but I am no longer sure that these outweigh the many negatives.

As to where the responsibilities lie for all of us who work in the IT space...well that's a conversation for another time. For now, I will continue to marvel at the sheer speed and size of digital innovation which arrives at my laptop every day and try not to dwell for too long on the increasing, alarming ways in which technology is used to do harm.



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Embedded AI: Beyond pilot phases

Trust in autonomous AI is rising, yet widespread adoption lags with UK leading in maturity.

NEW RESEARCH

from Insight Enterprises highlights a growing trust in autonomous AI, as 57% of organisations report being 'very confident' in the technology's reliability within core business processes. Despite this trust, implementation is slow, with six in ten organisations stuck in pilot or experimental phases. The majority employs AI in low-risk, narrow areas, with only 24% using it in production for defined use cases.

The UK demonstrates stronger AI maturity compared to its European counterparts, with 9% of organisations fully embedding AI into operations, topping the region, and ranking second in scaled deployments. Yet, the level of integration remains low, as 70% of UK businesses are yet to advance beyond small-scale pilots.

The Insight's EMEA AI Maturity Report suggests trust is not the issue, with just 1% of IT decision-makers doubting

the technology. Instead, the delay in AI adoption stems from operational and organisational challenges:

- Technology integration issues (36%)
- Skills gaps for AI system management (23%)
- Cultural resistance (17%)
- Governance and compliance framework gaps (14%)

These challenges mean AI maturity remains limited, with most markets stuck in early or scaling phases. Only 5% of European organisations have AI fully embedded, while a further 15% have scaled AI production. This reveals a stark contrast between confidence and actual deployment.

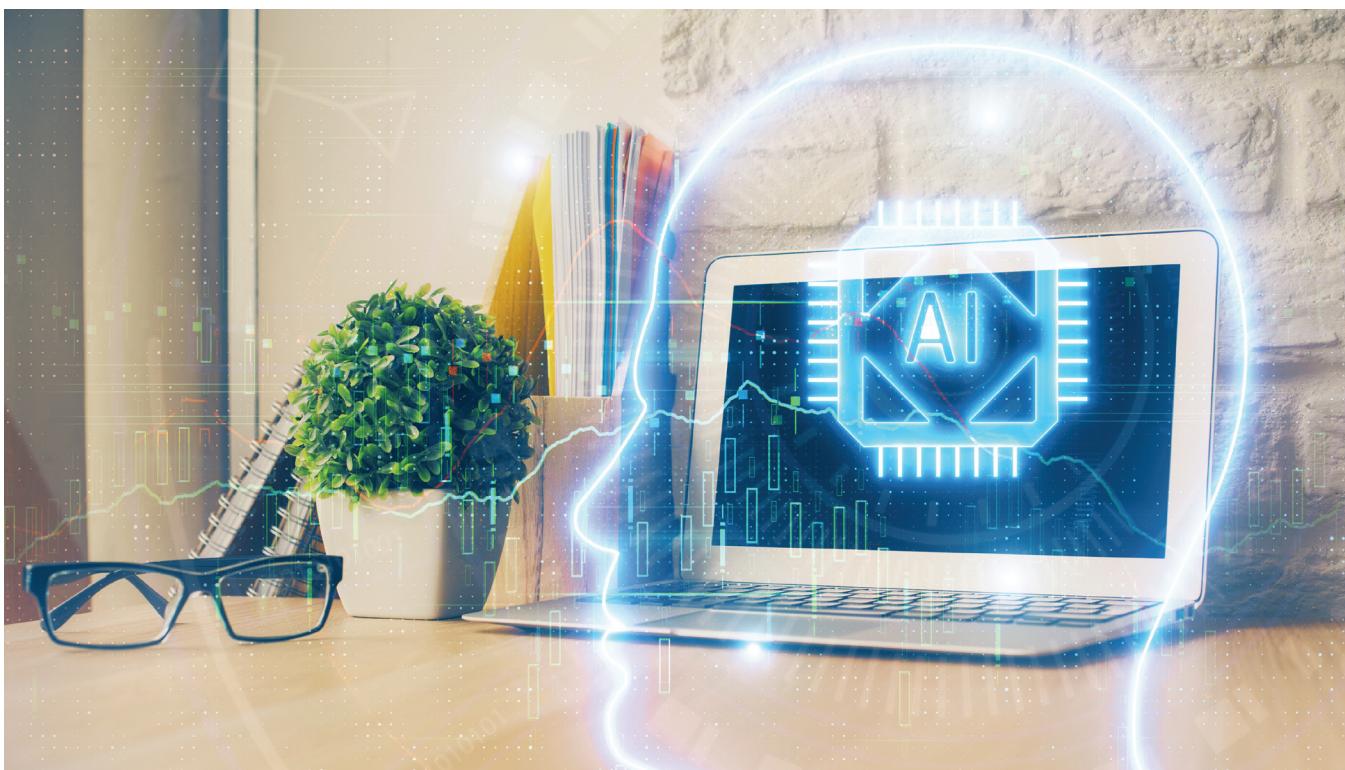
Over half of the organisations (52%) prefer cloud-based AI, with 16% strongly supporting it. Nonetheless, 44% still opt for on-premises solutions due to concerns about control, compliance, and performance. Balancing cloud and on-premises workloads requires

maturity that many enterprises have yet to achieve.

The survey captures the excitement surrounding AI's transformational potential but also notes the challenges in successful implementation. Limited results arise from a technology-led approach which merely places tools into teams without strategic integration.

As the leading AI Solutions Integrator, Insight suggests starting with business understanding, in collaboration with AI Forward Deployed Engineers. Such teams can develop rapid working prototypes within days, prioritising use cases and outlining a complete implementation plan with a business case for ROI.

Businesses need partners offering strategic guidance on integration and accountability frameworks, beyond mere technical expertise.



Unlocking growth: The untapped potential of simplifying enterprise software

A new report reveals the hidden costs of software complexity in business, urging simplicity to enhance growth and efficiency.

AS BUSINESSES increasingly expand their technological frameworks, they face an insidious challenge: complexity. Freshworks Inc.'s latest report, *The Cost of Complexity*, meticulously quantifies this burden.

According to the study, which surveyed 700 professionals worldwide across various sectors such as IT, CX, finance, and operations, the ramifications are threefold: diminished revenue, impaired productivity, and eroded morale.

The report identifies that software itself is a massive contributor to this complexity, draining an average of 7% of annual revenue. This loss parallels typical R&D allocations, as noted by EY, emphasising its magnitude. Businesses are wasting a significant 20% of their software budget on failed implementations and underutilised tools, costing the U.S. economy nearly \$1 trillion annually.

- Over half (53%) of companies reported not achieving the planned ROI from software investments.
- A third (34%) cited revenue leakage from delays and missed opportunities.
- Many leaders (43%) experienced over-budget implementations in the past year.

Such inefficiencies stifle innovation, quietly sapping momentum until their effect cannot be ignored.

Research highlights that workers lose nearly seven hours weekly to convoluted processes and scattered tools, directly impinging on the bottom line.



- Workers manage an average of 15 software solutions and four communication channels daily.
- 45% report working in silos, with inadequate coordination across teams.
- 37% lack a centralised data source.

Such complexity hits CX and IT teams hardest, with frustrations around uncustomisable workflows, disparate tools, and outdated designs.

Complexity not only affects efficiency but significantly impacts morale. This concern is so pressing that 60% of employees are inclined to leave their jobs within a year due to these issues.

Drivers include:

- Organisational complexity (38%)
- Complicated processes (30%)
- Burnout and poor or difficult software (30% and 17% respectively)

When staff become disillusioned by complex systems, it not only affects retention but hinders mutual support and innovation.

To avoid treating complexity as an unavoidable cost, businesses must embrace simplicity, re-evaluate their technological stacks, and prioritise straightforward solutions. This strategic shift promises budget optimisation, recovers lost productivity, and elevates employee well-being, unlocking true growth potential.

The report identifies that software itself is a massive contributor to this complexity, draining an average of 7% of annual revenue

Navigating the new data security landscape: challenges and insights

Proofpoint's latest report unveils significant challenges in data security, driven by AI adoption, data growth, and the rising prominence of AI agents.

PROOFPOINT, INC., a leading force in cybersecurity and compliance, has released its latest Data Security Landscape report. The findings underscore the continuous battle organisations face in safeguarding sensitive information, particularly in the context of rapid AI and data expansion.

Based on insights from 1,000 security professionals across 10 countries, the report highlights the compounded risks posed by AI-driven tools and autonomous agents handling sensitive data. Many enterprises are struggling to maintain visibility and control within this emerging "agentic workspace," where humans work alongside AI systems. Concurrently, the growing volume of data is increasing the demands placed on security teams.

"We've entered a new era of data security," said Ryan Kalember, chief strategy officer at Proofpoint. "Fragmented tools and limited visibility leave organisations exposed. The future

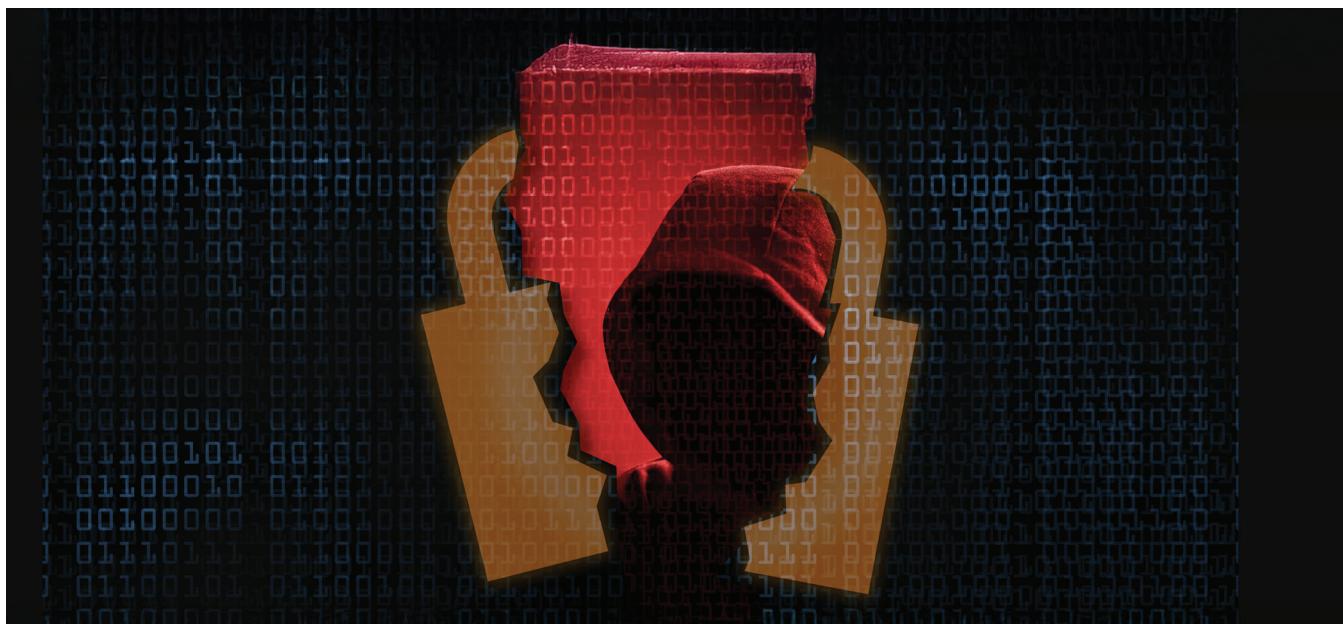
of data protection depends on unified, AI-powered solutions."

Key UK Findings:

- **Human Factor in Data Loss:** Approximately 66% of organisations pinpoint careless employees or contractors as the main culprits of data loss incidents. Other significant factors include compromised users (31%) and malicious insiders (33%).
- **Disproportionate Impact:** Proofpoint highlights that a mere 1% of users are responsible for 76% of data loss incidents, reinforcing the need for behaviour-aware security strategies. The frequency of these incidents is alarming, with organisations facing an average of 12 annually.
- **Data Growth Challenges:** A considerable portion of organisations reported a data increase of 30% or more over the last year. Large enterprises with over 10,000 employees manage vast datasets, exceeding a petabyte.

- **The Rise of AI Agents:** With the advent of AI in enterprise workflows, new risks have emerged. A significant portion of organisations regards data loss from GenAI tools and unsupervised AI agents as critical concerns.
- **Fragmented Security Architectures:** Organisations relying on multiple security vendors face challenges in visibility and response. It often takes weeks to resolve a single data loss incident, showcasing the complexities faced by stretched security teams.

There is a growing demand for more integrated, AI-driven data security solutions. Many security leaders are shifting towards holistic approaches to reduce risk and streamline operations. A significant number of organisations have already adopted AI-enhanced data security capabilities to manage and classify data effectively, aiming for a safer digital environment where AI and humans coexist seamlessly.



Building bridges: The introduction of the Agent Ecosystem by MACH Alliance

The MACH Alliance unveils the ‘Agent Ecosystem,’ aiming for seamless connectivity in enterprise AI through collaboration and open standards.

THE MACH ALLIANCE, in collaboration with 45 enterprise technology providers, has announced the formation of the “Agent Ecosystem.” This initiative aims to develop an interoperable, composable environment where SaaS and AI-native tools can connect seamlessly, fostering a pioneering agentic AI ecosystem.

A host of enterprise tech companies are joining this movement, emphasising experience, customer data, and commerce infrastructure. Participation is encouraged both within and beyond the Alliance, with an expansive list of initial supporters detailed below.

As the industry leader in composable enterprise architecture for the AI era, the MACH Alliance anticipates the rise of an “Internet of Agents.” It believes this transformation won’t be driven by a single vendor’s platform. By championing the Agent Ecosystem, the Alliance and its affiliates demonstrate that collective standards and trust can grant enterprises the liberty to thrive, embracing the full spectrum of AI. “While some technology providers envision a single platform to rule them all, we believe the future of enterprise AI will not be defined by a single agent, platform, or vendor” notes Jason Cottrell, CEO of Orium.

Rather than crafting new standards, the Agent Ecosystem seeks to cultivate interoperability, developing reference



architectures and operational patterns to deliver meaningful impacts at an enterprise scale. Their collaboration extends to AI labs, open-source projects, and hyperscalers like AWS and GCP.

An inspiration for the Ecosystem is the AGNTCY initiative, which outlines the foundational infrastructure of the Internet of Agents. Supported by various Alliance members, AGNTCY will significantly influence the Alliance’s future events and leadership narratives.

“Enterprises are experiencing another rapid technology hype cycle, and technology companies have an opportunity to do things differently this time,” mentions Amanda Cole of Bloomreach, encouraging a focus on achieving tangible results.

The folding arms of the Agent Ecosystem initially comprise organisations spanning diverse sectors:

- AI Infrastructure Platforms: EverWorker, Mastra, Maven AGI
- Cloud Enablers: Netlify, Vercel
- Systems Integrators: Accenture Song, Aries Solutions, Deloitte Digital, IONA, Orium, Publicis Sapient, Valtech, WPP
- Independent Software Vendors: Akeneo, Algolia, Amplitude, Bloomreach, Braze, Bynder, Cloudinary, Commerce Layer, commercetools, Contentstack, Coveo, Stripe, Zapier, and many others

Each player is dedicated to the collaborative ethos of the Agent Ecosystem, committed to reshaping the future of enterprise AI.

As the industry leader in composable enterprise architecture for the AI era, the MACH Alliance anticipates the rise of an ‘Internet of Agents.’ It believes this transformation won’t be driven by a single vendor’s platform

CDOs drive innovation with unified data strategies

Chief Data Officers are at the forefront of technological change, emphasising data strategy and AI integration for enhanced business performance.

AS ORGANISATIONS strengthen their data foundations, the pivotal role of chief data officers (CDOs) in driving technology innovation is underscored in a new Deloitte report. This reveals that a staggering 70% of CDOs are actively rolling out artificial intelligence (AI) systems or engaging in proofs of concept to gauge their efficacy.

The report highlights that while AI's immediate impact is perceived to be limited, many CDOs believe its capabilities will soon catalyse significant organisational transformations. Central to leveraging AI effectively is a coherent data strategy, emphasised as essential by the majority of CDOs surveyed.

Deloitte underscores the necessity of a unified data direction. Without this, organisations risk falling into the trap of siloed activities and redundant

efforts. By adopting a documented shared vision, CDOs can effectively communicate data's role in enhancing performance and underpinning long-term business goals.

Findings reveal a nuanced picture depending on organisational maturity. For those at high maturity, AI leads their priorities, with 67% focusing on AI development, while creating data products is also prominent at 56%. Conversely, for organisations at lower maturity, the priority centres around building data capabilities, emphasising data governance (63%), strategy (41%), and quality (33%).

Alarmingly, despite advancements, data strategy remains a steadfast priority, with roughly a third of CDOs considering it crucial for 2025. This perpetuates the necessity of treating

data as a core strategic asset in digital transformation.

Richard Bovey, the Chief for Data at AND Digital, reflects on this pivotal shift in organisational focus towards data and AI. Bovey asserts that the discourse around AI has evolved significantly, highlighting the non-negotiable requirement of quality-managed data in AI's success. He stresses that without trusted data, even expertly crafted AI models falter.

According to Bovey, fragmented data remains a substantial barrier, with 64% of business leaders identifying it as their primary challenge in AI adoption. He concludes that a successful future lies with organisations viewing data as a product, advocating for increased data literacy and investing in AI systems that are governed and aligned with tangible business outcomes.

CFOs chart path to AI adaption amidst growing pressures

ONESTREAM, a prominent enterprise finance management platform, has unveiled findings from a study that highlights the evolving role of Chief Financial Officers (CFOs) in the AI landscape. As boards and investors urge increased performance, CFOs are tackling AI's potential amidst significant hurdles.

Conducted among 350+ full-time CFOs in the United States, United Kingdom, and Australia, the study shows a marked shift towards AI adoption, directly impacting financial operations and beyond.

- **AI Investment Increase:** Come 2026, AI expenditure is set to surge, with CFOs predominately steering enterprise AI strategy. A staggering 83% of CFOs predict a

rise in AI investments, with an emphasis on finance where 80% expect increased allocations

- **Influence in AI Strategy:** Notably, 75% of CFOs claim leadership of AI strategy within their organizations, far surpassing CTOs and CEOs.
- **Collaborative Decision-Making:** Half of the CFOs report a strategic partnership with their CTOs, anticipating broader cross-functional collaboration as AI strategies mature.

Boards are largely supportive of AI initiatives, yet a divide remains on measuring its value. Despite 54% of boards strongly endorsing AI, CFOs are split on its perceived worth, with a significant 53% noting cost optimization as a future consideration. While 93% claim knowledge of ROI

from AI investments, only 56% of CFOs confirm tangible productivity improvements. Barriers such as limited AI talent and integration difficulties hinder smoother adoption across financial workflows.

While current AI applications are innovative but limited, priorities are set on foundational usage over the next two years, focusing on financial close, forecasting, and risk assessment.

Long-term, CFOs are keen on leveraging AI for strategic decision-making and scenario modeling, foreseeing sizeable efficiency gains despite existing challenges. Finding alignment between increased budgets and clear business outcomes remains essential.

Boom in hyperscale data centres: The future of digital infrastructure

The hyperscale data centre market is set for explosive growth, driven by rising demand for digital services, cloud computing, AI, and big data.

THE GLOBAL hyperscale data centre market, valued at USD 58.3 billion in 2024, is anticipated to grow at a CAGR of 26.3%, reaching approximately USD 591 billion by 2034, as per a report from Global Market Insights Inc.

This remarkable growth is largely attributed to the increasing demand for digital services, cloud computing, artificial intelligence (AI), and big data analytics. Hyperscale data centres offer massive scalability and energy efficiency, making them indispensable for technology providers, corporations, and government agencies. The rise in data consumption from sources like social media, IoT devices, and enterprise applications further amplifies

the need for these advanced systems globally.

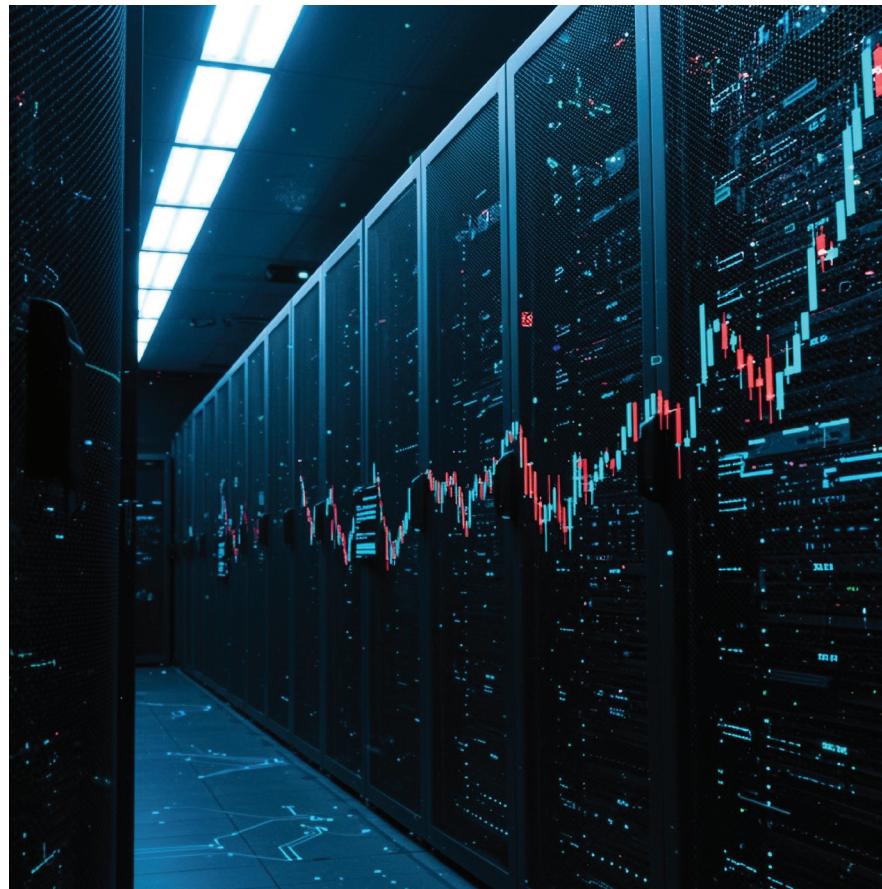
While the COVID-19 pandemic initially disrupted construction and equipment supply in 2020, it subsequently accelerated market growth. The global shift to remote work, e-learning, and increased use of online services in 2021 prompted hyperscale providers to expand networks, edge computing, and hybrid cloud infrastructures. Moreover, automation and remote management tools have become essential in operating efficiently amid workforce challenges, underpinning services such as AI-powered data management and workload orchestration.

In 2024, the market's solutions segment accounted for 78.8% and is projected to grow at a rate of 27.1% through to 2034. The segment's lead is due to the demand for scalable, high-performance IT infrastructure, encompassing servers, storage, networking hardware, and power and cooling solutions, needed for hyperscale settings. The burgeoning sectors of cloud computing, AI, and data analytics drive investments in robust, energy-efficient systems.

Enterprises held the largest market share of 55% in 2024, forecasted to grow at a CAGR of 24.8% until 2034. This is driven by the adoption of private and hybrid cloud infrastructures, supporting mission-critical workloads. Key sectors, including banking, healthcare, and telecom, leverage hyperscale systems for modernisation, agility, and cybersecurity.

The United States dominates the hyperscale data centre market, holding an 81.6% share in 2024, generating USD 17.5 billion. The country's advantage is supported by its strong cloud computing framework, extensive digital infrastructure, and substantial investment from major technology firms. It remains the pivotal hub for hyperscale operations and cloud adoption.

Leading companies in the hyperscale data centre market include Microsoft, IBM, Amazon Web Services, and Huawei Technologies. These firms are bolstering their market presence by expanding globally, investing in innovative technologies, and diversifying services. Emphasis is placed on automation, AI-driven data management solutions, and edge computing, aiming to optimise efficiency, reduce costs, and meet the growing demand for flexible, scalable solutions.



Europe's AI security controls trail global benchmarks

France (32%), Germany (35%), UK (37%) all lag on AI anomaly detection (40% global). Training-data recovery trails by 7 points. Europe regulates AI - but can't secure it.

KITEWORKS HAS RELEASED its Data Security and Compliance Risk: 2026 Forecast Report. The comprehensive analysis reveals that European organisations trail global benchmarks on the security controls needed to detect AI-specific threats, respond to AI-enabled breaches, and govern AI data flows.

The research, based on a survey of security, IT, compliance, and risk leaders across 10 industries and 8 regions, exposes a widening gap between Europe's regulatory leadership, with regulations such as the EU AI Act, and its actual AI security posture. European organisations trail on AI anomaly detection (France 32%, Germany 35%, the UK 37% vs. 40% global), training-data recovery (40% to 45% vs. 47% global), and software bill of materials (SBOM) visibility for AI components (20% to 25% vs. 45%+ in leading regions). When AI systems behave unexpectedly – or when AI-enabled attacks target European infrastructure – most organisations lack the detection capabilities to identify the threat. This can result in compliance fines and negative brand exposure as well as breaches of sensitive data.

"Europe has led the world on AI governance frameworks with the AI Act setting the global standard

for responsible AI deployment. But governance without security is incomplete," says Wouter Klinkhamer, GM of EMEA Strategy & Operations, Kiteworks. "When an AI model starts behaving anomalously. Such as accessing data outside its scope, producing outputs that suggest compromise, or failing in ways that expose sensitive information. European organisations are less equipped than their global counterparts to detect it. That's not a compliance gap. That's a security gap."

The report identifies six predictions for European organisations in 2026:

- **AI-specific breach detection will lag other regions.** France (32%), Germany (35%), and the UK (37%) all trail the 40% global benchmark on AI anomaly detection (the capability to identify when AI models behave unexpectedly). When AI-enabled attacks exploit model vulnerabilities or AI systems access data outside their intended scope, European organisations will be slower to detect the breach, exacerbating the detrimental impact of the exposure.
- **AI incident response will remain incomplete.** Training-data recovery (the ability to diagnose AI failures by examining what the model learned from) sits at 40% to 45% across Europe versus 47% global and 57% in Australia. Without this capability, organisations can't forensically analyse AI incidents or prove what went wrong to regulators.
- **AI supply chain visibility will remain a blind spot.** SBOM adoption for AI components sits at 20% to 25% across Europe versus 45%+ in leading regions. Organisations can't secure AI models built on



third-party components they can't see. As attackers increasingly target vulnerabilities in AI libraries, datasets, and frameworks, this visibility gap stops being a compliance checkbox and becomes an open door. Organisations without component inventories can't detect exposure, can't trace compromise origins, and can't respond until damage is already done.

● Third-party AI vendor incidents will catch organisations unprepared.

Only 4% of French Organisations and 9% of UK organisations have joint incident response playbooks with their AI vendors. When a vendor's AI system is compromised – and that compromise flows into European infrastructure – organisations won't have the detection mechanisms, communication channels, or containment protocols in place. The breach spreads before they know it exists.



- **AI governance evidence will remain manually generated.**

European organisations cluster in “continuous but manual” compliance rather than automated evidence generation. This creates dual financial exposure. Regulators assessing fines will find documentation that is slow to produce and inconsistent in quality, while insurers adjudicating breach claims may deny coverage entirely if organisations cannot demonstrate adequate AI governance controls were in place. Governance thus becomes a payout gap.

- **AI incident response will remain incomplete.**

Training-data recovery (the ability to diagnose AI failures by examining what the model learned from) sits at 40% to 45% across Europe versus 47% global and 57% in Australia. Without this capability, the risk window becomes more severe while compliance exposure becomes more difficult, with organisations unable to forensically analyse AI

incidents or prove what went wrong to regulators.

The implications extend beyond compliance. AI systems are increasingly processing sensitive data, making autonomous decisions, and integrating with critical infrastructure.

Every AI model that can't be monitored for anomalies is a system where adversarial inputs, data poisoning, or model manipulation go undetected. Every third-party AI component that can't be tracked is a dependency where upstream compromises silently inherit into your environment. Every AI vendor relationship without a joint incident playbook is a breach that spreads unchecked across organisational boundaries.

These aren't governance failures waiting for a regulatory audit. They're attack surfaces waiting for an adversary. Compliance gaps carry the abstract risk of penalties. Security gaps carry the concrete certainty of compromise: data exfiltration, manipulated outputs, operational disruption. The difference

is between a fine you can budget for and a breach you can't predict.

The global report, which includes 15 predictions across data visibility, AI governance, third-party risk, and compliance automation, identifies “keystone capabilities” – unified audit trails and training-data recovery – that predict success across all other security metrics, showing a measurable advantage for organisations that have implemented them.

“The AI Act establishes what responsible AI governance looks like. The question for European organisations is whether they can secure what they're governing,” adds Klinkhamer. “By end of 2026, the organisations that have closed the gap between AI policy and AI security through anomaly detection, training-data recovery, supply chain visibility, vendor incident coordination will be positioned for both compliance and resilience. Those still running AI workloads without detection capabilities will learn about their security gaps the hard way: from attackers, not auditors.”



Executives demand faster innovation, stronger ROI and resilience

New research highlights executive priorities amidst evolving pressures, showcasing the pivotal role of AI and automation within contemporary business strategies.



IN TODAY'S RAPIDLY shifting corporate landscape, Rimini Street's latest survey titled "C-suite Imperatives: Accelerating Innovation in a Shifting Landscape" sheds light on how top executives reshape their technology strategies. Conducted with Censuwide, it engaged nearly 4,300 key stakeholders, exploring the pressures directing high-level technological decisions.

The findings underscore a trend among executives to pivot their focus toward AI, automation, and organisational resilience. This comes as boards demand accelerated innovation coupled with tangible business outcomes. Notably, many organisations continue to face shrinking budgets and palpable cybersecurity challenges.

However, the widening talent gap and dissatisfaction with vendor-directed ERP roadmaps emerge as critical hurdles. While a staggering 97% of executives acknowledge their current systems suffice, nearly a quarter of workforce efforts go into maintenance activities, spotlighting inefficiencies needing rectification.

Key Findings Highlighted

- **AI and Automation as Strategic Pillars:** Approximately 44% of leaders identify AI and automation as pivotal for IT initiatives both in the immediate and long-term future. While cost optimisation and cybersecurity remain focal points, strategic emphasis is shifting towards reliable, intelligent operations bolstered by comprehensive business continuity and skill enhancements.
- **Rising ROI Expectations:** Collaboration predominantly occurs between CIOs (31%) and CEOs (27%), highlighting the need for increased CFO involvement. Expectations for ROI elevate as executives target measurable outcomes, with projections indicating significant paybacks over varying timeframes. A growing consensus points towards futuristic, decision-making autonomous ERP systems driven by AI.

- **Talent Shortages Hampering Progress:** With 36% of leaders constrained by skill gaps and 23% alarmed at project delays, almost all surveyed executives acknowledge talent shortages as a barrier to technological aspirations. Consequently, outsourcing critical IT tasks, especially in cybersecurity and support, becomes a strategic imperative to mitigate risks and optimise operations.
- **Emphasis on Resilience:** As risk landscapes evolve, business risk reduction is highlighted by every executive, with cybersecurity, supply chain stability, and economic unpredictability at the forefront. Strategies include expanding business continuity planning, securing alternative suppliers, and workforce augmentation to adapt and thrive amid persistent vendor challenges.

Rimini Street's insights illustrate how executives are veering away from traditional vendor-centric models, opting to maintain control over their strategic direction. This paradigm shift facilitates allocating resources towards AI-driven initiatives, promising enhanced flexibility, superior efficiency, and prolonged growth trajectories.



Unlocking the benefits of private wireless and on-premise edge in industrial transformation

Nokia's 2025 Industrial Digitalization Report, developed with GlobalData, highlights rapid ROI and transformative benefits for industries adopting on-premise edge and private wireless technologies.



NOKIA'S 2025 Industrial Digitalization Report, developed in collaboration with GlobalData, sheds light on the significant benefits industries are experiencing by integrating on-premise edge technology and private wireless networks. According to the report, 87% of adopters observed a return on investment within a year, with 81% noticing reduced setup costs and more than half saving above 11%. Ongoing expenses dropped for 86% of enterprises, with 60% reporting savings exceeding 11%.

The report is based on insights gathered from 115 industrial enterprises across diverse sectors such as manufacturing, energy, logistics, mining, and transportation in regions including Australia, Germany, Japan, the United Kingdom, and the United States.

The transformative capabilities of AI rely heavily on access to high-quality real-time data. An impressive 94% of enterprises have harnessed on-premise edge technology coupled with private wireless to achieve this. Such integration provides secure, low-latency connectivity in intricate environments, ensuring saturation of

sensor coverage even in challenging areas. Consequently, 70% of surveyed companies are benefiting from AI-driven use cases like predictive maintenance and digital twins.

The report emphasises the role private wireless plays in driving sustainability. Among those surveyed, 94% reported a decrease in carbon emissions, with 41% achieving a reduction of over 20%. Additionally, 89% saw energy conservation improvements. Predictive maintenance, integrated devices, and drones further facilitate reductions in fuel-based travel and enhance emissions tracking accuracy.

Beyond environmental impacts, 71% of enterprises are deploying technologies such as automated alarms and geofencing solutions to bolster worker safety. Connected devices optimise tasks, reducing unnecessary mobility, simplifying information access, and minimising paperwork. This streamlining cuts down human errors, thereby enhancing efficiency and automation.

With security being paramount, 57% of respondents have identified

cybersecurity as a pivotal reason to deploy Industrial Edge platforms empowered by Private Wireless networks. These solutions incorporate features like encryption, physical network separation, and alignment with zero-trust frameworks, ensuring robust security while maintaining business continuity and compliance.

"GlobalData forecasts the global private wireless network market will nearly double to US\$8 billion by 2027. This reflects the growing demand as industries face mounting pressure to modernise in line with global sustainability and efficiency goals. Nokia and GlobalData's latest research helps leaders build strong business cases for digitalisation by showing how private wireless and on-premise edge not only reduce costs but also accelerate scalable transformation with measurable improvements in worker safety, productivity, security and environmental impact," said David de Lancellotti, Vice President of Enterprise Campus Edge Sales at Nokia.

According to the report, 87% of adopters observed a return on investment within a year, with 81% noticing reduced setup costs and more than half saving above 11%. Ongoing expenses dropped for 86% of enterprises, with 60% reporting savings exceeding 11%



The CIO mandate: Balancing innovation and resilience



As AI reshapes the workplace, the role of the CIO is entering a new phase. AI adoption is taking place nearly twice as fast as adoption of the internet and personal computers did and is placing new demands on IT departments.

BY JOEL CARUSONE, SVP DATA AND AI AT NINJAONE

TO REALISE AI's potential, CIOs must build a robust, secure, and scalable environment. This means integrating AI while continuing to manage the complexity of an expanding tech stack, long standing skill gaps, and increasingly distributed teams.

This already represents a challenge, with 75% of CIOs reporting difficulty balancing AI usage in the enterprise with existing IT operational excellence demands. These issues will only increase with more scrutiny on IT budgets.

While demands constantly evolve, some realities have become clear. CIOs cannot solve these issues on their own. They must enable IT leaders and

teams, streamline critical processes, and provide the resources and strategic guidance needed to achieve their goals. Success hinges on three key areas.

AI Strategy is Imperative

AI is no longer an isolated technology. It is now deeply embedded into the foundation of modern business operations. With this integration, CIOs and other leaders will increasingly be held accountable for AI-driven outcomes, both positive and negative.

Since AI is no longer a niche concern delegated to IT specialists, the responsibility also falls on executive leadership to understand AI strategies and ensure they are both robust and

impactful, while also ensuring the people running them maintain control and oversight.

CIOs must move beyond fragmented approaches and instead champion AI initiatives that unify various departments. AI implementation should break down silos, foster interdepartmental collaboration, and align with overarching business objectives.

From governance frameworks to ethical considerations, a well-structured strategy will be instrumental in ensuring responsible and effective AI deployments. CIOs who proactively address AI complexities will not only mitigate risk but also position

their organisations for sustainable innovation.

Resilient Growth

While technological advancements can provide a competitive advantage, innovation must not come at the cost of security and stability. The urge to use AI everywhere should be balanced with a commitment to IT and security best practices, involving humans in the decision-making process.

In a fast-evolving digital ecosystem, strong data management underpins resilience. Backups, cloud storage, rigorous data audits, and automated device management are the foundation of a sustainable technology strategy.

However, they must be incorporated with an understanding of the current and future technology landscape. For example, the growth of SaaS applications and connected devices means IT teams must implement solutions that support not just these endpoints but also the users behind them.

With the right strategies and skills, CIOs can drive innovation while safeguarding their organisations from potential vulnerabilities such as unpatched systems, shadow applications and unauthorised access. A balanced approach – one that fosters both technological curiosity and operational stability – will be key to long-term success.

Addressing IT Challenges

IT teams remain stretched thin, and this strain will only intensify. With IT managers often expected to oversee thousands of devices and applications, CIOs must act as advocates for their teams to senior leadership.

The fact is, introducing AI or any other technology into the mix will not single-handedly solve IT's challenges. However, the strategic implementation of automation can alleviate much of the burden associated with routine, time-consuming tasks.

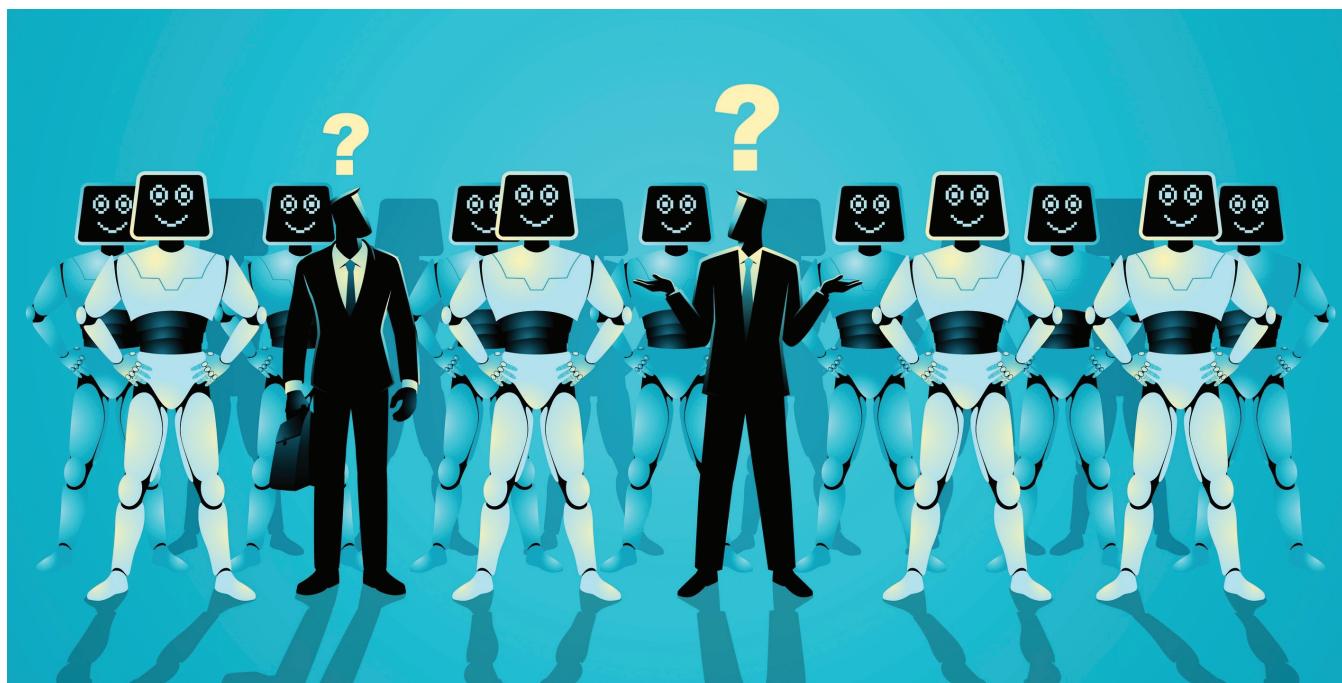
Automation, particularly in areas such as configurations, installations, monitoring, endpoint management and network operations, has the potential to improve consistency, reduce human error, and free up IT professionals to focus on strategic work. With these automation-driven efficiencies, CIOs can enhance productivity, reduce burnout, and create a more agile IT environment.

The Next Phase of CIO Leadership

CIOs should concentrate on empowering IT leaders to integrate AI capabilities into the wider business, without compromising the security of critical systems.

By taking a proactive and strategic approach, AI can become a key driver of transformation, efficiency and sustainable success.

While technological advancements can provide a competitive advantage, innovation must not come at the cost of security and stability. The urge to use AI everywhere should be balanced with a commitment to IT and security best practices, with humans involved in decision-making.



Why a unified data stack matters in the era of AI agents



It's increasingly evident that a unified data stack will underpin modern systems. As AI becomes integrated into all aspects of a business, infrastructure that removes silos and unites operational and analytical systems together will be essential for powering teams to innovate and grow without constraints.

BY DAEL WILLIAMSON, EMEA CTO, DATABRICKS

DESPITE the explosion in adoption of AI, many businesses still run on architectures in which their enterprise data is split into either operational systems (OLTP) or analytics systems (OLAP).

This separation was dictated by legacy infrastructure which made it challenging to run both day-to-day applications and analytical workloads on the same platform. That divide is now a source of operational issues, resulting in friction, waste and delays across teams.

This split created a disconnect: developers concentrated on keeping applications running, while analysts were left working with data that was often outdated or incomplete.

Modern cloud architecture has removed some of the technical barriers, but the divide persists, sustained by legacy software, vendor lock-in and long-standing working practices. It's time to rethink this model and move towards a unified data stack that reflects the rise of AI agents and applications.

Tackling the legacy bottleneck
Once data lands in a transactional system, it becomes both tricky and expensive to move. Proprietary storage formats and tightly coupled architectures trap data inside operational systems and block integration with modern data and AI workflows. The result is that businesses end up working around

infrastructure that no longer fits their needs.

Modern AI agents and applications require rapid and reliable access to live data. However, when operational data is stuck in legacy environments, it becomes much harder to enable automation, personalisation or just real-time decision-making. In addition to slowing development, this also limits responsiveness, scalability and the ability to extract timely insights from rapidly growing data volumes.

An increasing number of businesses are now, understandably, seeking alternatives that remove these constraints and offer a unified, responsive foundation for modern data-driven systems.

Bridging the divide between operations and analytics

The original OLTP/OLAP split was logical at a time when computing capabilities were limited. Running analytics alongside operational workloads simply wasn't viable. But with cloud-native storage, such as open table formats, businesses no longer require separate pipelines to make operational data available for analytics.

Yet, many organisations still rely on outdated architectures where operational data must be extracted, transformed and loaded before it can be analysed, introducing delays, duplication and overhead.





The negative impact is not to be overlooked. Analyst's base decisions on outdated information. Developers spend time maintaining fragile pipelines instead of building new capabilities. Innovation slows and opportunity costs mount.

In response, more and more businesses are shifting to unified data architectures, where operational and analytical workloads share a single data foundation, utilising engines optimised for each specific task. This reduces complexity, improves efficiency and enables faster iteration — all of which are critical benefits in the AI era.

Readying the data stack for intelligent agents

AI agents are driving a step-change in application development; performing complex, multi-step tasks by reasoning over proprietary data and interacting with other components in real time. With the ability to coordinate decisions and actions throughout an entire data ecosystem, agents mark an evolution beyond basic automation to becoming fundamental parts of organisational operations.

For this shift to be both supported and successful, infrastructure must evolve. AI agents require low-latency access to live data, seamless integration across systems and modern development workflows. A new concept known as

a lakebase remedies these issues. It delivers the reliability of an operational database and the openness of a data lake in one, centralised place, so teams can run transactions and analytics without the challenge of juggling systems.

It enables fast access to data, scales easily through separated storage and compute, and fits modern development habits like instant branching and versioning. Built for today's AI-driven workloads, a lakebase empowers both developers and AI agents to build, test, and ship applications quickly, without the constraints of old OLTP setups.

Shaping the next generation of data platforms

It's increasingly evident that a unified data stack will underpin modern

systems. As AI becomes integrated into all aspects of a business, infrastructure that removes silos and unites operational and analytical systems together will be essential for powering teams to innovate and grow without constraints.

Legacy OLTP systems have become out of sync with what modern, AI-driven businesses demand, because of their fixed and complex architecture. Unified, open platforms that can support transactional operations and real-time intelligence without compromise are crucial for AI-native applications.

This shift won't occur overnight, but organisations that start to reduce fragmentation, adopt open standards and build for agent-driven systems, will be best positioned to succeed in the era of AI

In response, more and more businesses are shifting to unified data architectures, where operational and analytical workloads share a single data foundation, utilising engines optimised for each specific task. This reduces complexity, improves efficiency — all of which are critical benefits in the AI era



The AI gap: why enterprises are failing to prepare their data



Rohan Vaidyanathan - Vice President, Content Intelligence, Hyland, calls for a shift in focus from chasing AI trends to building digital maturity through infrastructure, data quality, and intentional implementation, positioning enterprises to unlock meaningful outcomes and long-term innovation.

JUST AS THE Internet completely changed our lives, there is no doubt that artificial intelligence (AI) has the potential to do the same. So, while AI is rightfully a top priority across all industries and regions, there's an elephant in the boardroom... things aren't going according to plan. As generative models evolve faster than most enterprise systems can adapt, the gap between ambition and readiness is widening.

Enterprises are under immense pressure to showcase measurable ROI from digital innovation and launch effective AI models. But, put simply, the gap between ambition and execution has never been wider. So, what's the solution?

Fundamentally, the problem isn't AI itself. Instead, it's organisations rushing in without a strategy and neglecting the data that fuels these models. As a result, if businesses want to start seeing meaningful outcomes, they need to be more targeted with their investments. And it starts with the right foundation.

The data problem

There's a phrase in developer circles that neatly explains why bad data is so detrimental: "garbage in, garbage out". All too often, organisations are feeding outdated or even erroneous information into their AI models and are then disappointed by the output. But what most businesses don't realise is that they're sitting on mountains of valuable content in the form of unstructured

data; it's just not being used. Unstructured data encompasses everything, from emails to video footage, that lacks a predefined format, creating significant management and analysis challenges. According to Gartner, it represents a staggering 80% of enterprise content, and with enterprise data doubling every two years, it can very quickly become unmanageable.

Unlocking the potential of this data is key to maximising the value of AI. Unstructured data, once converted into AI-ready, usable information, can often provide the nuance and context needed for fully comprehensive responses. The sheer scale of unstructured data, however, means it's impossible for

humans alone to sort through and categorise what is often thousands of terabytes of information. Fortunately, content management solutions have come a long way in the past decade, and, with the right platform, businesses can access their valuable data more easily than they think.

Back to basics

If effective AI is the destination, content management platforms are the vehicle to get you there. Too many organisations are still running on siloed systems, meaning that content, business processes, and applications are all fragmented. Even if the data across these disparate platforms was structured, AI cannot possibly operate efficiently in this kind of environment.

The public sector illustrates this point clearly. Valuable information is often siloed across different departments and agencies, and the restrictions imposed by legacy systems force AI models to operate on limited context. For GenAI, this means low quality responses, but for a more autonomous AI agent, this could lead to some dangerously flawed decisions.

As well as consolidating data, modern content management platforms can make it AI-ready as well. These tools can transform and standardise different content types into a format that can be fed into AI.

Scanned copies of hand-written notes, for example, are turned into machine-readable text, and video recordings are automatically transcribed. This automation means more data can be analysed and AI models can offer more valuable, accurate insights.

In fact, it's precisely these advancements in content management that have made successful AI use cases so impactful. We're now entering the era of ubiquitous enterprise intelligence, where organisations have a living record of their business, which

in turn enables large-scale automation. As AI evolves and needs increasingly large quantities of high-quality data to fuel their output, this holistic, contextual understanding of enterprise content will only become more important.

Building from the bottom

The organisations that have seen success with AI are taking the time to get the basics right. While it's easy to get distracted by the long-term possibilities of AI, none of its potential can be realised without the foundations of infrastructure and data quality.

Crucially, those investing now are laying the groundwork for the future. It's important to remember that AI is still in its infancy and the pace of innovation is accelerating. But if enterprises are struggling to integrate AI effectively now, they'll find themselves even farther behind in a couple years.

It essentially boils down to digital maturity. And while it's easy to become fixated on AI-specific shortcomings, the real story reveals a much deeper issue -- businesses aren't making the most of their data, and often they don't even know what they're missing.

The real AI gap is between the organisations that truly understand this technology and those that are just chasing trends. AI cannot be treated as a bolt-on upgrade, a quick one-size-fits-all fix, or a replacement for human creativity. Enterprises need to be much more intentional by tailoring their implementation to the business's specific needs and investing in the infrastructure that can support their ambition.

As with any new technology, teething problems were inevitable, but there's been enough time to know what works and what categorically does not. Businesses can't afford to bury their heads in the sand any longer. Now is the time to learn from the past and invest in your future.

All too often, organisations are feeding outdated or even erroneous information into their AI models and are then disappointed by the output



The true end of silos



The AI and No-Code revolution in the workplace.

BY DARIN PATTERSON, VP OF MARKET STRATEGY AT MAKE

THE LINE between 'technical' and 'business' jobs is about to vanish - so if you're not preparing now, you are falling behind. This division has been holding organisations back for many years, and with the tech skills gap an increasing problem, it's time to break down job roles and reenergise the workforce. No-code and AI are changing this by reshaping jobs, making it easier for workers outside the IT department to harness tech to fuel innovation.

Departmental barriers are already dissolving down thanks to these technologies, as are the 'guardrails' around individual job titles, as everyone from product managers to content writers take hands-on control, and expand their skillsets. The biggest barrier to AI adoption isn't the tech - it's

leaders still clinging to 20th-century job descriptions.

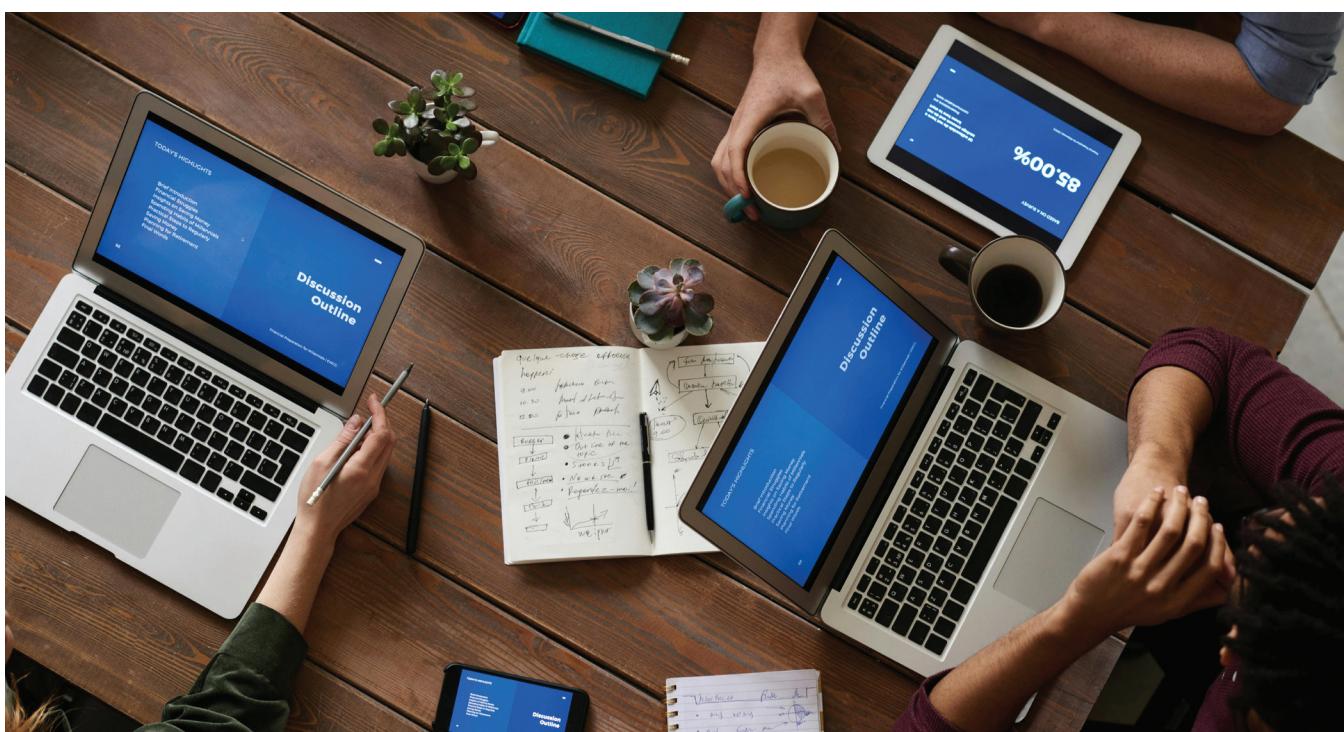
AI, paired with no-code or low-code approaches, is already extending the capabilities of workers, enabling people to 'break out' of predetermined job roles. This means that ordinary business users, across departments from marketing to operations, can streamline their own workflows, in effect redesigning their own jobs. No-code puts power in the hands of non-tech experts, and erases traditional silos, reshaping what job roles mean. This empowers people to deliver more, deliver faster, and expand their abilities.

This transformation requires bravery and a culture shift. To oversee it effectively requires not just the right technology, but also a people-first

approach, and leaders who are happy to take risks and move beyond the stiff, pre-defined job titles of years gone by.

Cross-functional teams are reshaping work

How quickly can no-code and AI drive change? David Cheng was selling cars at Stellantis UK, before using no-code technology to spark change across the organisation, including creating AI-supported communication solutions. At Stellantis UK, the organisation had previously been sceptical about automation, and clung to traditional IT structures. But the power of no-code reshaped the business, helping to cut five working days of manual message reviewing for their aftersales team using AI, all without writing a line of code. For Cheng, no-code has enabled him to deliver progress in the area he





worked, cutting non-value-adding work for grateful colleagues, and allowing the team to focus on customers.

In the past, product managers were primarily responsible for understanding customers and translating those insights into requirement documents, which were then handed off to designers and engineers. Today, the rise of no-code platforms, AI tools, and even “vibe coding” is reshaping how these three roles and others collaborate. No-code makes it possible for almost anyone on the team to prototype. AI takes on heavy-lift tasks like data analysis, wireframing, and even code generation. And vibe coding, while less formal, reflects a growing culture of experimentation where teams lean into creativity and speed. In turn, prototypes can be created and tested much faster, and the lines between responsibilities are becoming more fluid.

Product managers, engineers, and designers are no longer working in isolation, but in a shared creative loop that accelerates progress and sparks new ideas. Product managers still guide the “why” and the “what,” but now they can experiment directly with prototypes,

closing the gap between strategy and execution.

Designers, using no-code tools, can map and test user journeys in real time, uncovering friction points and iterating on experiences before development even begins. Engineers, empowered by vibe coding, no longer need to write every line of code themselves; instead, they validate, scale, and refine AI- or no-code-generated outputs, applying their expertise to the most complex challenges. The result is faster iteration, more inclusive collaboration, and products that evolve with both speed and quality.

Rather than diminishing the importance of each role, these shifts are expanding their impact. Designers gain greater influence on the user journey, engineers become orchestrators of scalable systems, and product managers can bring solutions to life more directly. Content specialists, too, are extending into areas like layout and channel optimisation. AI and no-code are enabling teams of hybrid generalists to collaborate in new ways, fostering faster iteration, more creativity, and deeper cross-functional

cooperation. The immediate benefits are clear, but the long-term impact on how organisations innovate may be even greater.

Overcoming the AI skills gap

The AI talent and skills gap is a real problem for many organisations, with McKinsey forecasting that demand for tech and AI talent is going to remain up to four times the rate of supply until 2027. No-code tools powered by AI though can help organisations cut through this skills shortage, by allowing non-technical teams the freedom they need to build tools without having to wait on development cycles.

Let's be honest. Even the most advanced organisations are finding that established ways of building products are being outpaced. For years, multi-stage development processes, however agile or efficient they once seemed, set the rhythm for how teams worked. But the arrival of AI, no-code platforms, and new approaches like vibe coding is changing that rhythm almost overnight.

Teams that previously prided themselves on speed and agility are discovering that their tried-and-tested practices are suddenly too slow. Product managers, engineers, and designers can now collaborate in real time, prototyping and iterating far faster than traditional processes allowed. What once felt like industry-leading efficiency is rapidly becoming yesterday's news.

The challenge today isn't about avoiding the “bad old days” of software delivery — it's about recognising that the bar has been raised again, and adapting quickly enough to stay ahead.

Product managers, engineers, and designers are no longer working in isolation, but in a shared creative loop that accelerates progress and sparks new ideas. AI and no-code are enabling teams of hybrid generalists to collaborate in new ways, fostering faster iteration, more creativity, and deeper cross-functional cooperation

Even in organisations with deeply specialised experts who can already deliver high-quality software at speed, a new frontier is emerging. Low-code and no-code tools are enabling people with far less technical experience to step in and shape meaningful change.

This shift challenges the traditional setup of expert-only teams: suddenly, innovation isn't limited to the specialists. With centers of excellence helping to streamline adoption and share best practices, silos break down and a much wider range of voices can shape solutions. Innovation is no longer the preserve of the few, it's becoming a capability of the many.

Building future-proof teams

Building environments where non technical users can safely and effectively rebuild their own jobs with automated and AI-driven solutions is the goal. This enables leaders to strengthen their teams for the long-term, expanding their skill sets and breaking out of legacy divisions.

Naturally, some control is required: it can't be a Wild West scenario. The ideal is an environment where workers can take charge of their own challenges and solve them without fear. To create this sort of future-proofed team requires

business leaders to build the right company culture, with a careful mix of systems and processes to guide workers in the right direction.

A key part of this is to understand your own technology landscape. When you start to automate, and to empower your workers to automate, the level of complexity can build up within your organisation. It can be easy to find yourself unable to see the wood for the trees. So visual approaches to no-code and AI automation are key, allowing non-technical workers and business leaders to take an overview of technology and understand its interaction across the organisation.

By having a clear, visual way to oversee innovation within low- and no-code platforms, organisations can help non-technical workers to work closely with other teams and future-proof the organisation as a whole. Clear, visual overviews of how processes and teams interact will also be vital to establishing guardrails around technology and ensuring businesses drive safely towards their goals.

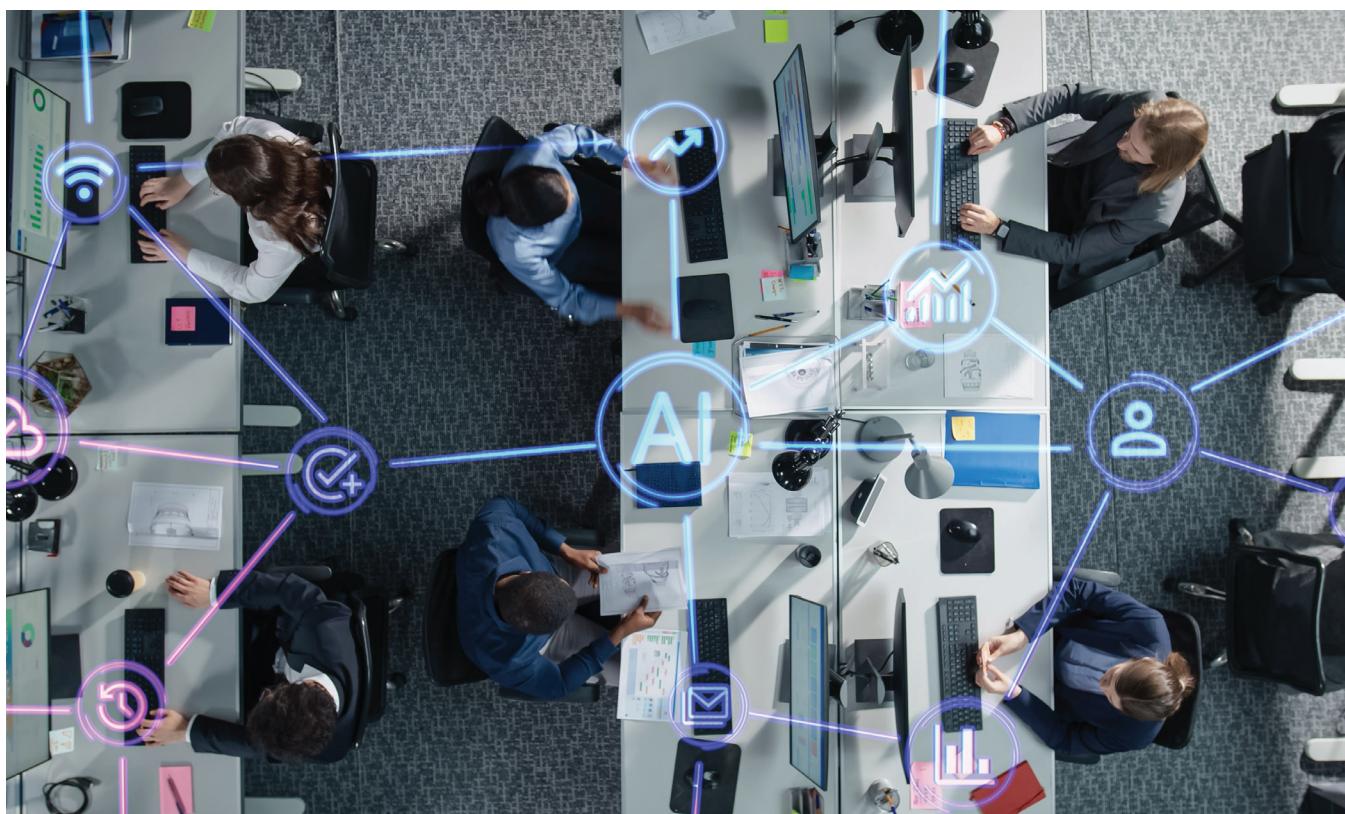
No more silos

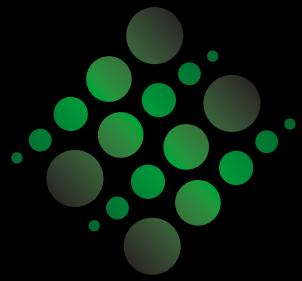
Breaking down barriers between developers and the rest of the business holds the promise to transform many

So visual approaches to no-code and AI automation are key, allowing non-technical workers and business leaders to take an overview of technology and understand its interaction across the organisation.

organisations from top to bottom. With traditional job roles shifting and expanding, workers are empowered to expand and future-proof their skill sets.

Business leaders can break down silos within their organisation, driving business results today, and paving the way for a more innovative future. The organisations that act now will own the future. The rest will be asking their competitors how they did it.





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- 13 MARCH '26** Shortlist announcement
- 16 MARCH '26** Voting Open
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Why AI will bring a sustainable tech revolution



Sustainability is not just ethical, it's the path to efficiency and effectiveness in the AI era for all businesses.

BY MATT TEBAY, MULTI-CLOUD EVANGELIST, OVH CLOUD

AI IS BOTH powerful and power-hungry. It's already driving the next technological revolution, but AI applications consume far more power than regular compute tasks. In fact, it's double jeopardy for IT teams: GPUs are both intensive to run and expensive to buy. Even in the cloud, a basic GPU instance is often twice as expensive as a comparable compute instance.

This means more pressure and hard choices for IT teams. Experimenting with AI is often seen as a way of staying competitive, but cutting costs in other areas can leave the business exposed. A recent report from Crayon found that a staggering 94% of IT leaders are struggling to optimise their cloud costs – and AI lives in the cloud.

However, what we are increasingly seeing is that many companies are looking at more sustainable solutions from both a hardware and software perspective to stay agile on cost.

Efficient and effective

Sustainability may not quite sit on a par with cost and security, but teams are increasingly realising that sustainable technology is often efficient technology. This is particularly important for AI, because on average, a GPU dedicated to AI consumes around five times more electricity than a regular GPU for gaming or rendering processes, for example.

This makes it key to understand how and why power efficiency works across the entire technology stack. All of the components interact with each other, making it a tangled system to unravel.

However, we can start with the bigger picture. At an infrastructure level, organisations should think about how quickly they need AI processes to be done. If you're a startup, you often need to iterate quickly, because you're trying to bring a product to market, so you probably do need fast GPUs

like Nvidia H100s. But if you're a large enterprise doing model training over a weekend, then although an H100 might finish by lunchtime on Saturday, a V100 finishing by 8am on Sunday would still be around 40% cheaper, depending on the provider¹.

Of course, this is an oversimplification; when specifying a GPU, technology teams need to think about the model they're using, how many parameters it has, the degree of precision required, the number of concurrent users and the usage patterns, for example.

And there's additional considerations to bear in mind. When organisations are doing model training, it can be done anywhere, because it's not user-facing. Inference, on the other hand, is user-facing, so it's much more sensitive to latency and therefore location. This means that model training can be done almost anywhere, with a broader range of – potentially cheaper – providers. At

the same time, using lower-spec kit is greener. An H100 has a 'cradle to gate' (i.e. manufacturing) carbon footprint of approximately 150kgCO₂e, compared to an L4's 50kgCO₂e. For reference, an average CPU has a footprint in the region of 5-25kgCO₂e². In short, being smart about AI infrastructure can cut costs and reduce carbon footprint.

At the same time, energy consumption depends on the characteristics of the application itself. CPUs and GPUs are generally more energy intensive than tasks which use more of the RAM or SSD. And in general, running applications is where we can make the most impact – largely because most semiconductors are assembled in the same way, in the same factories, so the carbon footprint is broadly similar. Interestingly, the manufacturing impact is the inverse of the running patterns: making RAM and SSDs usually takes up more power and has a higher carbon impact than making CPUs.

Furthermore, it's also important to look at the energy mix of a country when locating AI tasks, because some areas are more dependent on fossil fuels than others. And however much green energy your provider buys, the actual power for a task will come from the grid, and will therefore be from a mix of sources, making the national mix one of the most important things to look at.

It probably goes without saying that redundancy is an important consideration. Having two sets of infrastructure running at the same



Using lower-spec kit is greener, and energy consumption depends on the characteristics of the application itself. In short, being smart about AI infrastructure can cut costs and reduce carbon footprint

time means twice the bill and twice the carbon footprint. Many backup and business continuity infrastructure providers offer a 'passive mode' which can reduce power consumption, but it does increase the time taken to get back up and running in the event of a failure. This makes it key to understand the profile of the application you're running, which means talking to business stakeholders and adapting accordingly.

There's also a sliding scale of costs for storage. High performance storage like NVMe SSDs, for example, are expensive and carbon-intensive compared to conventional hard drives with a spinning disc. Old-fashioned tape storage is very cheap, sustainable and has a long lifespan, but is very slow to retrieve data from!

Our final infrastructure consideration – resource scaling – is where we start blurring the line between the hardware and the software. Correctly sizing a virtual machine in the cloud is a fine art, mostly because it's relatively easy to scale CPU allocation, but harder to re-allocate memory – and although memory might not have as great a power consumption as CPU, no-one wants to be paying for memory they're not using.

Into the code

It might surprise you to learn that even the code of an application has an impact on its power consumption, but today we have organisations like the Green Software Foundation which exist to help promote more power-efficient software practices. One of the historic problems with code efficiency and power consumption is that developers don't code from scratch anymore, and indeed, it doesn't make sense to do so. This means that although it's faster to code because you can use libraries and APIs, if you have inefficient building blocks to start with, your application will perpetuate the problems.

Furthermore, not all programming languages are equally efficient. Languages that run at a more fundamental level (like Rust and C) tend to be more high-performance and powerful, but this does incur the Spiderman rule (with great power comes great responsibility). The potential for exploits and mistakes in a more powerful, fundamental language is exponentially greater than that with languages like Perl and PHP, so teams must always balance cost, power and risk.

Lean and green

The IT industry is always under pressure to do more with less and perform the careful balancing act of making sure technology can do what it needs to while staying secure, agile and cost-effective. AI is a great tool for helping to enhance organizational efficiency and productivity, but it can also be a spanner in the works, inflating costs – sometimes for uncertain payoff.

This makes it more important than ever before to understand every link in the chain. Although there can often be simple, broad-reaching initiatives to reduce costs, it's equally important to think from the grass roots upwards and trim costs without compromising on functionality. This is where good environmental practice and cost control can intersect, helping businesses to get the most from their systems, but also staying efficient and sustainable. Today, sustainability is not just ethical, it's the path to efficiency and effectiveness in the AI era for all businesses.

REFERENCE

¹ Based on OVHcloud September 2025 pricing with task starting at 5pm on Friday.

² Intel PCF / OVHcloud LCA

Powering resilience:

The role of AI and connectivity in the utilities sector's digital transformation



The utilities sector is heading into one of the most transformative periods in its history. Surging energy demand, driven by AI and exponential data growth, is reshaping the industry's operating environment. Already, AI's power requirements are doubling every 100 days, while global data centre energy consumption is forecast to increase by 160% by 2030. If these projections become reality, data centres will double their share of overall global power consumption within the decade.

BY ALEXANDER GITTENS, UTILITIES, ENERGY AND ENTERPRISE SALES MANAGER, GETAC

FOR UTILITY PROVIDERS, this surge represents more than just a numerical challenge; it signals a systemic shift in how energy is consumed and delivered. The current strain on infrastructure and resources will require not just incremental improvements, but to rethink how the sector operates. While AI is contributing to this pressure, it is also part of the solution. When combined with rugged computing technologies, AI can revolutionise how field technicians work, enabling faster, smarter and more resilient operations across the energy grid.

The demand dilemma

Rising digitalisation is redefining the way the world consumes power. AI, which requires vast computational resources for training and deployment, continues to add to this pressure with a growth trajectory unlike anything the sector has seen before. Together, these forces are reshaping how energy is generated, distributed and managed, placing immense strain on utility companies and energy grids worldwide.

Traditional operating models are ill-equipped to manage such rapid increases. Outages, grid instability and inefficiencies in energy distribution risk becoming more frequent unless the industry finds new ways of working.

Consumers also have the expectation of uninterrupted service, while regulators demand compliance with strict environmental and performance standards.

In this environment, utilities cannot afford to remain reactive. They need to anticipate challenges before they happen, and this is where AI and rugged computing converge.

Turning AI from energy burden to ally

AI is driving much of the demand surge, but it is also one of the most powerful tools available to help utilities companies manage it. The technology's capacity to process vast amounts of data in real time and generate predictive insights makes it invaluable for grid stability and operational efficiency.

When integrated into rugged computing devices, AI becomes a hands-on tool for technicians, not just a centralised system. Field technicians use AI-enabled devices to identify potential faults before they escalate, analyse smart-meter data to forecast demand spikes, and help streamline workflows on-site. Instead of relying on instructions from a control centre, workers can make informed decisions

in real time, reducing delays and improving response times. In field operations, reliability is critical. Field technicians often work in remote or high-pressure environments, where fast and informed decisions are vital. AI-enabled systems provide the intelligence to make those decisions effectively, delivering predictive insights directly to the field. Rugged computing technologies complement this by ensuring those insights remain accessible and actionable, even in the harshest conditions. The result is a workforce that can operate with the same data-driven precision in the field as in the control centre.

But AI alone cannot deliver transformation in isolation. Its true power emerges when combined with the connectivity and data exchange made possible by IoT and next-generation networks like 5G.

Enabling intelligence through connectivity

The growth of AI is closely linked to other digital technologies that are changing how utilities work. The Internet of Things (IoT) now underpins this shift, linking sensors, meters and field assets that constantly capture data across the grid. This connected infrastructure provides the visibility AI

needs to monitor system performance, predict demand changes and optimise energy delivery. At the same time, the rollout of 5G networks is enabling these devices to communicate and process data with far greater speed and reliability. Together, IoT and 5G are creating the conditions for AI to deliver on its promise of faster decision-making, improving grid coordination and supporting the industry's transition toward more efficient and sustainable energy use.

This connected ecosystem also makes it possible to integrate renewable energy sources more effectively. Smart sensors can track variable inputs from solar and wind generation, while AI analyses this data to balance supply and demand in real time. Connectivity is not only improving operational efficiency but also helping accelerate the transition to cleaner, more sustainable power.

By combining AI, IoT and 5G, utilities can now see and respond to what is happening across their networks in real time. This shift from visibility to action marks the beginning of a new era of operational resilience, where data-driven insights help prevent problems before they occur.

Operational resilience through intelligence

Perhaps the most significant advantage of AI-enabled rugged computing is the shift it brings from reactive to predictive operations. For decades, utilities have been forced into a cycle of responding

to outages only after they occur. This reactive model is expensive, disruptive, and increasingly unsustainable as demand accelerates.

With AI-ready rugged devices, that cycle can be broken. Predictive analytics allow utilities to anticipate failures before they happen, preventing downtime altogether. Automated diagnostics reduce the time technicians spend troubleshooting issues in the field, enabling them to focus on delivering solutions. Smart-meter data processed on-site supports more efficient demand management, helping utilities balance loads more effectively across the grid.

The benefits ripple outwards. Faster service restoration and fewer outages lead to greater customer satisfaction and stronger public trust. Lower operating costs free up resources for infrastructure upgrades and renewable investment. Technicians, equipped with AI-ready rugged devices, can work more effectively, spending less time on paperwork and more on critical repairs. In short, utilities gain the resilience and efficiency needed to meet modern expectations.

Shaping a smarter, more resilient energy future

The utilities sector is entering a period of profound transformation. Driven by rapid digitalisation, exponential data growth and the widespread adoption of AI, the industry faces pressures unlike any it has encountered before. But within these pressures lies opportunity.

By combining AI, IoT and 5G, utilities can now see and respond to what is happening across their networks in real time. This shift from visibility to action marks the beginning of a new era

By integrating AI into rugged computing technologies, utilities can empower their field technicians, streamline operations and build resilience into every aspect of their network. As AI and digital infrastructure mature, the line between energy generation, distribution and management will continue to blur, paving the way for a more intelligent and adaptive energy ecosystem.

AI-ready rugged devices bring intelligence to the edge, turning field workers into proactive problem-solvers armed with real-time insights. They provide the tools utilities companies need to reduce downtime, manage soaring demand more effectively and improve customer service at scale. The future of utilities will not be defined by energy demand alone but also by how the industry responds to it. With AI and rugged computing working hand in hand, the sector can move beyond simply coping with strain to actively shaping a smarter, more sustainable future.



How Agentic AI delivers ROI around the clock



In the AI gold rush, most companies are still exploring how GenAI might improve internal workflows or customer experiences. But the next evolution - Agentic AI - is already driving measurable ROI, especially in procurement.

BY KASPAR KORJUS, CEO AND CO-FOUNDER AT PACTUM

AGENTIC AI is not only speeding up supplier negotiations, it's unlocking enterprise-level value far beyond traditional automation, enabling teams to scale, cut costs and improve supplier relationships at the same time.

As companies transition from pilot projects to deployment, one question is rising to the top of every boardroom agenda: how do you capture and measure ROI from Agentic AI?

Agentic AI delivers results beyond human bandwidth

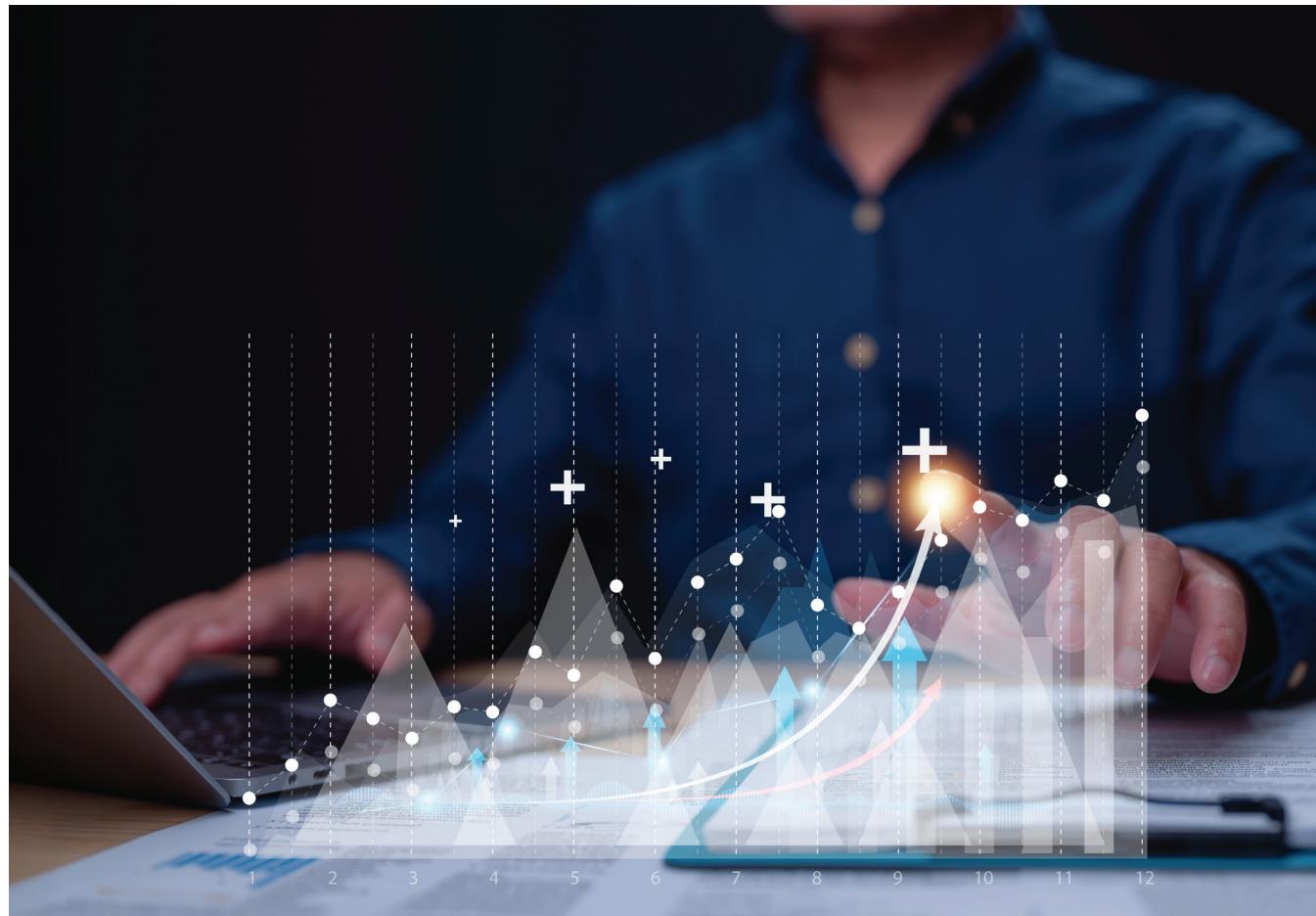
Traditional procurement teams are constrained by regular working hours, human attention spans and the complexity of managing multiple negotiations simultaneously. AI agents operate autonomously, eliminating those limits, even during off-hours.

These agents operate 24/7, executing supplier deals at scale, reconciling

data from multiple source points and identifying the best possible outcomes without fatigue or oversight.

The result is a new level of operational throughput. Instead of procurement managers juggling dozens of negotiations, Agentic AI can handle hundreds – accelerating cycle times and creating efficiencies that humans simply cannot match at the same time and scenario. In a business





landscape where speed and accuracy directly impact margins, this is a huge advantage for driving growth.

Impact is multidimensional

When businesses think ROI, they often default to cost savings. Agentic AI certainly delivers in that aspect, Pactum AI's customer base is broadly looking at ten times ROI, which, now, is easily done thanks to the use of AI agents. The bigger impact, however, is broader and longer-term.

By automating negotiations, procurement professionals are freed from the repetitive, transactional tasks that typically consume their time. Instead, they can redirect their expertise toward higher-value activities, such as developing sourcing strategies, building stronger supplier partnerships, driving innovation and aligning procurement decisions with wider business objectives.

Crucially, Agentic AI doesn't just make processes faster; it makes them smarter. By managing more consistent, data-driven negotiations, Agentic AI fosters trust and transparency, laying the

foundation for long-term partnerships rather than one-off deals. What's more, these agents are constantly learning from one negotiation to the next, meaning they gradually improve over time to ensure future engagements are even more efficient and effective.

The result is a compounding effect: companies that adopt early don't just capture immediate financial benefits; they build a durable strategic advantage that strengthens with every cycle.

Agentic AI is judged not on novelty, but its ability to consistently do the work – with authority, speed and scale, and these are the metrics that stakeholders care about

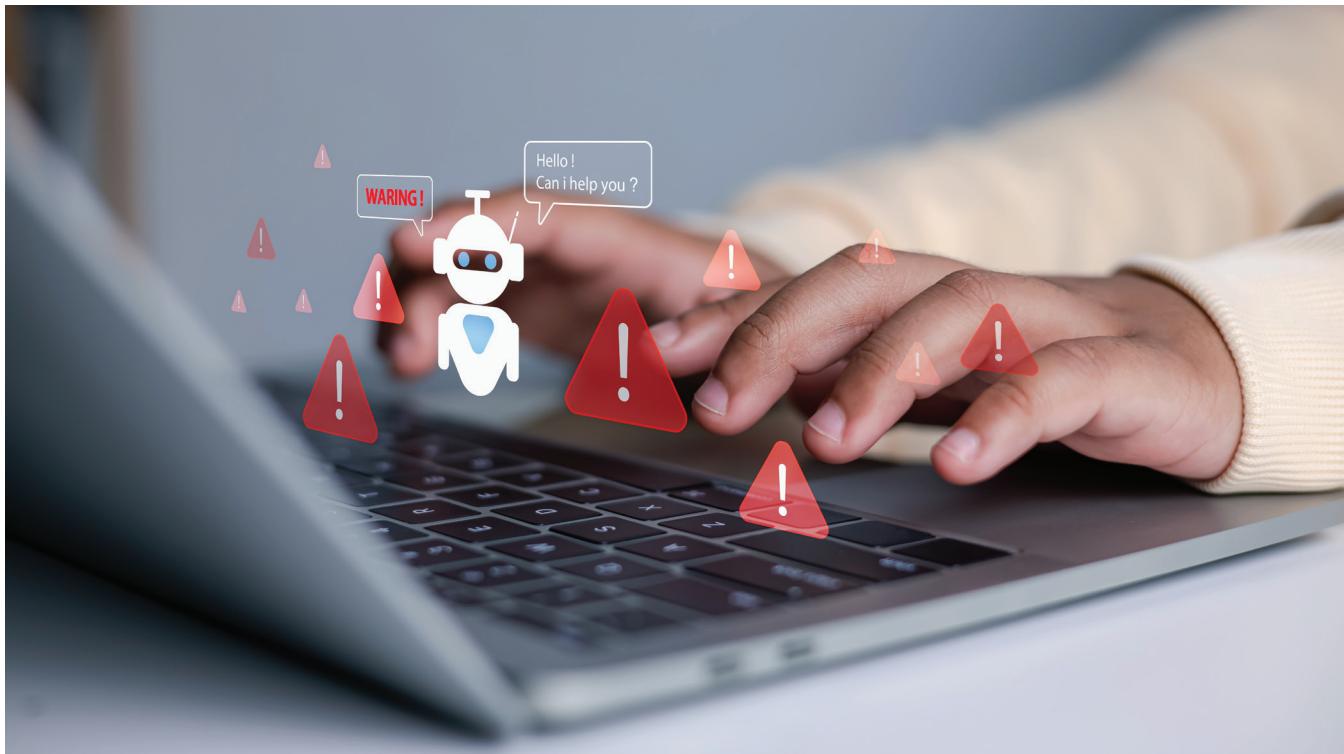
Pitching ROI as a startup requires clarity

Whether you're offering GenAI or agent-based AI, how you frame ROI matters. Agentic AI is judged not on novelty, but its ability to consistently do the work - with authority, speed and scale, and these are the metrics that stakeholders care about.

Successful cases go beyond broad claims of automation and efficiency. They show how autonomous negotiations integrate into existing workflows, reducing reliance on manual processes and producing success both financially and non-financially.

As companies shift from experimentation to deployment, Agentic AI is emerging as a ROI-driven solution - particularly in procurement, where every efficiency scales across the business.

The winners of this next phase won't be those chasing novelty, but those who prove that autonomous agents can deliver lasting, measurable value.



AI's data privacy wake-up call



Why sensitive data in AI training is a regulatory and data breach time bomb

BY ROSS MILLENACKER, SENIOR PRODUCT MANAGER, PERFORCE SOFTWARE

MANY DevOps leaders could be sleepwalking into a regulatory breach and security nightmare when it comes to AI data privacy. Recent research shows that while most IT leaders focus on locking down production systems, there are very real dangers in non-production environments, such as AI training. These areas often use real, sensitive data, such as Personal Identification Information (PII), including customer health records, financial information, and Social Security numbers. The consequences can include data breaches, security issues, regulatory fines, and loss of market reputation and customer trust.

Nor are the risks just hypothetical. According to the Perfice 2025 State of Data Compliance & Privacy, 60% of the survey's respondents have experienced data breaches or data theft in software development, testing, AI, and analytics

environments, an 11% increase compared to 2024's report results. 22% report regulatory non-compliance status or fines, plus a further 32% have faced audit issues. These results are all the more concerning given that 100% of the survey's 280 global respondents must adhere to regulatory compliance, including CCPA, GDPR, and HIPAA.

Confusion, contradictions, and complacency

While DevOps professionals' awareness of the risks of exposing sensitive data in general may be high, the research shows that this awareness is not translating into safer practices in non-production environments like AI, and that confusion is prevalent.

91% of organizations believe that sensitive data should be allowed in AI training and testing, and 90% use sensitive data in AI

82% are of the opinion that using sensitive data in AI model training and fine-tuning is safe.

Furthermore, 84% confess to compliance exceptions in non-production environments, including AI, despite the high rate of data breaches, as well as audit and regulatory compliance issues.

Yet, DevOps leaders are not oblivious to the risks being taken:

- 78% of the survey's respondents admit to being highly concerned about theft or breaches in AI model training
- 68% worry about compliance and audit issues.

So why are organisations taking such significant risks? It turns out that the leading reason for 76% of the survey's respondents is data-driven decision-

making. Teams working in AI training and other non-production environments like software development, testing, and analytics are data-hungry, depending on information that is as realistic as possible. The further the data drifts away from production-like values, the less accurate the results will be.

Shortcuts win over safeguards

Also, DevOps teams want access to production-like data quickly, which increases the temptation to use real customer data, despite the potential risks of inadvertently exposing sensitive information. The situation is exacerbated when feeding this information to AI. As most people are increasingly aware, AI is a blabbermouth that shares secrets and has a long memory.

The reality is that while DevOps leaders know that data privacy is essential, they want to balance that necessity against pressure to innovate as fast as possible, especially in the era of AI. There is also a cultural challenge here: protecting data is viewed as complex, time-consuming, and a roadblock to innovation.

Using real data in AI is not necessary

It is time to put these misconceptions in their place and remove the confusion. The fact is that there is no need to use sensitive data in non-production environments, by using techniques and tools that deliver realistic fit-for-purpose

While teams need realistic, production-like data to innovate effectively, there is no need to use sensitive data in AI training when masking and synthetic techniques can deliver the same results safely.

data. There are also strong indications that, while many organizations might still be a confusing mire today, many have already taken steps towards better protection of data in AI training environments, with other plans emerging.

For example, it is good to hear that 95% have some form of masking policy or mandate, and that 95% are already using static data masking. This method hides or replaces sensitive data while keeping it usable for environments like AI training. Furthermore, modern static data masking tools can provide that data in a fraction of the time it previously took to give DevOps teams realistic production-like data.

Whereas once it required database administrators (DBAs) taking days to deliver this data, that timeframe can be brought down to just a couple of hours, and self-served by users, rather than relying on DBAs, some of whose time is subsequently liberated for other priorities.

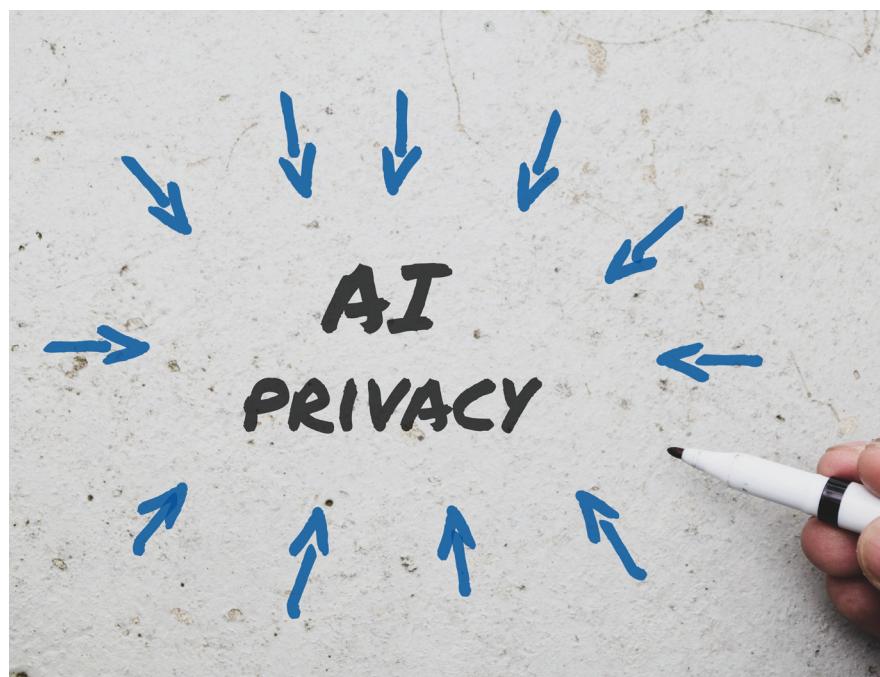
Another option is synthetic data, which is artificially generated using production-like values, but without having any contact whatsoever with real data. Nearly half of organisations surveyed say they are already using synthetic data in AI development, although adoption is in its early stages: a third report using it on a small scale or experimentally, and a further quarter have tried it but experienced problems with speed, scale, and quality.

Teams will combine synthetic data and data masking

However, synthetic data is evolving at a rapid pace, including the use of AI technology itself to automatically generate realistic artificial data at speed and customised to the situation. Looking ahead, the most likely scenario is that DevOps teams will use a combination of data masking and synthetic data techniques, depending on the use case —for example, for compliance, new applications, or to address a specific requirement.

Looking more broadly, 86% plan to invest in AI-specific data privacy solutions across the next year or so, but it is important to note that tools are not the only answer to better data privacy in AI and other non-production environments. Creating a culture where governance is prioritised and policies are consistently enforced has to be a priority, with awareness and governance part of every DevOps team's DNA.

After all, sacrificing data privacy to keep up with innovation and business demands is a hazardous strategy for DevOps leaders that could end in disaster and with a high price to pay. Conversely, putting in place a plan that gives teams high-quality, production-like data without risking exposure of sensitive data will help DevOps teams maintain, and even improve, innovation at speed and at scale.



Smart shields, smarter threats



The dual-use dilemma of AI in cybersecurity

BY DAVID HOOD, CEO, ANSECURITY

IT'S AN exciting time in enterprise technology. Yet before we all get too excited, we should remember that technology is a fundamentally morally neutral thing. It can be used for both good and bad purposes and noble and malicious ends. AI is just another example in a long line of them.

AI has seemingly made its way into almost every platform, tool and product currently on offer within cybersecurity. Many are certainly bullish about its potential effect on cybersecurity: As of the beginning of this year, 55% of organisations had already implemented some form of AI-based cybersecurity.

Yet security is often a game of escalation. As defenders improve, so do attackers and for every technology that improves security, cybercriminals will find ways to use it or exploit it to their own ends. For as much as AI

might revolutionise cybersecurity in the future, it is already revolutionising cybercriminality.

How cybercriminals are now using AI

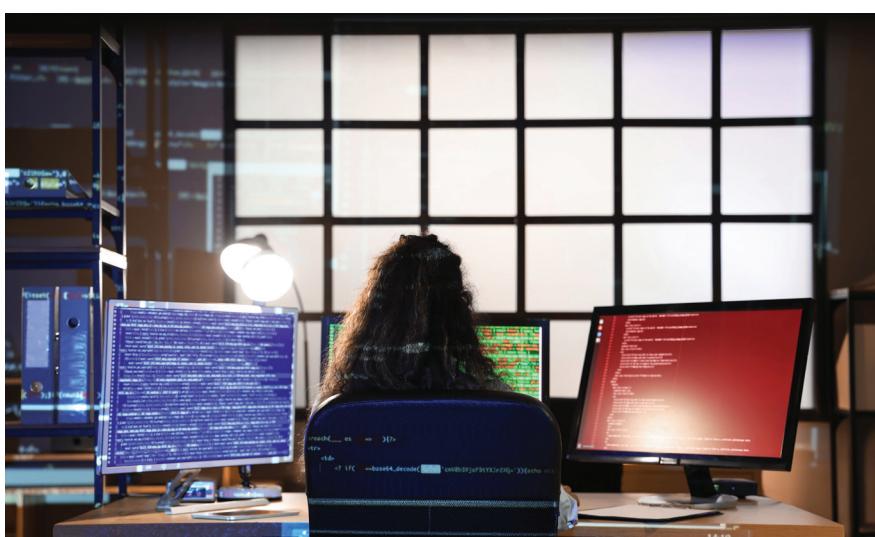
AI has had two principal effects on cybercriminals. Firstly, it's democratised cybercriminality. Generative AI tools - such as code assistants and even ChatGPT - have allowed people to learn how to perform cyberattacks, perform quick and easy reconnaissance on potential targets and even generate code for attack scripts.

The same is true of fraud where generative AI has allowed inexperienced and untrained fraudsters to craft ever more convincing phishing emails and assume false and stolen identities with deepfakes and AI generated documents.

The barrier to entry has then been massively lowered for both cybercriminals and fraudsters. In the same way that Generative AI has produced adolescent tech millionaires overnight from "vibe coded" apps, generative AI has allowed budding criminals to effectively launch attacks and pull off scams without even knowing how to code.

For more advanced actors - it has supercharged their capabilities: The use of automated frameworks has allowed them to upscale their attacks massively; they're using AI to discover vulnerabilities in targeted entities; scraping data to perform fast and thorough reconnaissance and optimising their ability to crack passwords; becoming ever stealthier in their attacks and even using AI botnets to decide when the most opportune moment to attack is. On top of all that, they're using AI tools to steal and fabricate identities to trick identity verification systems, perform fraudulent transactions with banks and even use them to imitate voices and faces to carry out deepfake fraud and phishing scams.

Examples of these new possibilities abound. BlackMatter ransomware, for example, is now using AI to improve their encryption strategies and avoid detection tools. In 2021, criminals used AI tools to clone the voice of a company director. Using that fraudulent voice they successfully conned a UAE-based bank into transferring \$35 million into their accounts. In 2023, University of Indiana researchers found a network





For as much as AI might revolutionise cybersecurity in the future, it is already revolutionising cybercriminality

of bots - dubbed fox8 - which used ChatGPT to generate crypto-focused spam and misinformation designed to defraud X users. Perhaps most importantly, however, these were not spotted by X's bot detectors or LLM content detectors.

Cybercriminal AI has grown as a shadowy reflection of the legitimate world with an ecosystem of tools, services and heated debates around what it means for their sector. The result is that AI-generated attacks have seemingly spiked.

In fact, according to SoSafe's Cybercrime Trends 2025 report, 87% of global organisations faced an AI-based cyberattack in the last year. A Sentinel One report says that phishing has grown by 1265% due to Generative AI. CrowdStrike reports that Voice Phishing attacks (Vishing) were up 442% between the first and second halves of 2024.

A shadowy reflection

Much as in software development, there is now an ecosystem - and growing economy - of tools and services that have proliferated in cybercriminality. Some of those are just the publicly available AI tools that anyone can use, such as ChatGPT. Others are jailbroken generative AI services, so-called "Dark LLMs," that can provide information and perform actions which would normally violate the ethical guardrails. These are now on open sale on the dark web, as criminal vendors take models from Anthropic, xAI and Mistral and others, jailbreak them and then rent them to cybercriminals.

Anthropic recently published research detailing how cybercriminals used their AI tool - Claude - to perpetrate a wide spanning campaign. The authors wrote: "The actor demonstrated unprecedented integration of artificial intelligence throughout their attack lifecycle, with Claude Code supporting reconnaissance, exploitation, lateral movement, and data exfiltration." In fact, this particular threat actor used Claude to compromise and extort 17 targets in government, healthcare, emergency services and even religious institutions.

Claude allowed them to orchestrate and scale their campaign: Automating reconnaissance, harvesting and tracking credentials, told them how best to penetrate targeted networks, which data to take, crafted extortion strategies based on the specificities of each target, determined appropriate ransom amounts and even generated ransom messages tailored to each target. Perhaps most importantly, Claude adapted to target defences in real time, lending them an agility that their targets lacked. Claude was used at seemingly every step of the campaign to great success and it's likely just one example of what we'll see in the future. Indeed, the report concludes, "we expect this model to become increasingly common as AI lowers the barrier to entry for sophisticated cybercrime operations."

AI Defence: useful, not decisive

AI will not be a silver bullet here and the benefits that AI brings to cybersecurity won't necessarily help stop AI-based attacks. Defenders - whether they use AI cybersecurity tools or not - don't feel that they're equipped to defend

against these attacks: Darktrace's 2025 AI Cybersecurity report noted that 45% don't feel adequate to the threat of AI cyberattacks.

The diversity of tactics and possibilities malicious AI has unlocked means that resisting won't simply be about bolting on an AI-based defence tool. That will help, but like any tool, its value depends on how, why and by whom it is used.

AI-cybersecurity will likely find its most useful aspect in hyper-specialised use cases, improvements on pre-existing technologies and embedded within hardware "at the edge." Neural Processing Units (NPUs), for example, are chips which can accelerate AI/ML inference workloads on devices, as opposed to via the cloud. This means that many security functions that might normally happen at the network level could happen on-device. This could grant every laptop and desktop computer its own AI-firewall, permit on-device behavioural analysis and local anomaly detection and then carry out immediate prevention and isolation when threats are detected. This could mean a real hardening of endpoints the world over.

AI will have positive effects in many industries, but we can't just treat them as unalloyed goods. Risks abound within the legitimate AI tools that legal businesses use, and we should remember that every technology can and will be used for both good and ill. In the end - in cybersecurity and everywhere else - if we want to seize the benefits of AI, we'll also have to factor in the threats it poses too.

From cost centre to value driver: a strategic approach to observability in the cloud



Cloud-native architecture delivers faster time-to-market, higher availability, and richer telemetry – fundamentally transforming how organisations operate. Yet, as cloud-native infrastructure scales, the rest of the tech stack must adapt to a new environment with distinct challenges and vulnerabilities.

BY RILEY PERONTO, DIRECTOR OF PRODUCT AND SOLUTION MARKETING, CHRONOSPHERE

COMPARED TO traditional systems, data volumes increase by 10 to 100 times. This leads to observability costs often outweighing the cost of cloud infrastructure itself. The dilemma for cloud-native adoption planners and implementers is clear: how can companies keep costs under control while maintaining the visibility needed to deliver excellent customer experiences?

Cardinality's cost complexity

The total number of unique combinations of metrics a system produces, also known as cardinality, is a critical driver of cost. Cloud-native architectures drive up cardinality as these combinations rapidly multiply. High cardinality then leads to increased telemetry data, which the organisation has to contend with.

As cardinality increases and additional dimensions are added to measurements, it becomes more expensive and more challenging to navigate. Organisations need smart data that is captured with the proper fidelity, for the right duration, and for the intended purpose. An exponential increase in data volume without those considerations becomes a hindrance instead of help.

Engineers recognise that strong observability is essential for innovation and the foundation for all business value. High-performing teams treat observability like any other business-critical programme. An effective operating model can be broken into a four-step optimisation cycle: govern, analyse, refine, and operate.

Govern

Many businesses don't have real-time insight into which teams and applications consume the most observability capacity. Cost allocation is often manual and delayed, leaving teams ignorant to their consumption impact. Because of this, a team's budget can easily be exceeded before anyone notices.

To enforce governance, observability capacity must be logically divided into teams, services, and environments. IT managers can then set clear quotas to ensure that one group's data surge can't impede the rest.

Going one step further, more advanced observability practices not only monitor cost and usage attribution, but also set alerts for when limits are approached.





With this increased visibility, a business can avoid unexpected bills, and take steps to mitigate the outcome.

Analyse

Traditional observability tools employ blunt levers to reduce data. At first glance, this is effective in meeting organisational needs, as those looking to cut costs can push data into a lower-cost tier, such as archive storage. While this might be useful in the short term, it also introduces risk. For instance, how can business leaders know their teams won't need that data during a production incident?

Sustainable cost control requires understanding how teams actually use the data. Adopting platforms that demonstrate how data is utilised in dashboards, alerts, and queries provides a solid overview.

Businesses can confidently minimise data collection by removing redundant and underused metrics or logs that teams never use. Once these processes are in place, identifying quick wins becomes easy.

This will enable the business to identify data streams that can be optimised in more complex ways, including aggregating noisy, high-frequency series using rollup rules, which is an effective way to control costs. These sophisticated rules maintain the visibility required to provide the best possible client experience.

Refine

Simply collecting less data is not a realistic option for those looking to maintain visibility into production services. Instead, businesses should analyse the most important metrics to gain insights. This will guide them in selecting and formatting the exact data required.

This calls for controls that enable teams to adjust structure and fidelity during incident response without losing signal quality. Strong data controls are delivered centrally. This way, an IT team can drop, summarise, or transform metrics without needing to re-instrument or redeploy services, and can preview changes to pre-empt the impact of a rule before enabling it. This capability allows for timely, safe responses during an incident whilst offering continuous optimisation.

Operate

Optimisation should be seen as a feedback loop rather than a one-off tidy-up. Once rules are in place, advanced observability practices will begin assessing impact. For example, one could track the efficiency of rules, such as the percentage by which data points per second are reduced, and demonstrate the resulting impact on observability costs.

Constant awareness of the financial implications guarantees that improvements stick. To detect regressions early, teams will need to

maintain dashboards that track the impact of optimisation over time and monitor in real time for cardinality spikes and cost fluctuations.

Teams that bring governance, usage-aware analysis, and real-time control to observability achieve the outcomes that matter most to the board: lower, predictable costs and faster, more confident releases. Strong observability supports commercial value and is not a luxury. However, clarity, rather than accumulating everything, is what creates value. Organisations can maintain the transparency and sustainability of cloud systems by prioritising high-utility telemetry, transforming data at the source, and implementing continuous optimisation.



From chaos to control: how to overcome the limitations of single-purpose data tools for business impact



The way we use data to make decisions, drive innovation and grow has changed. Single-purpose tools may have helped to solve yesterday's problems, but today's complexity needs connected, strategic solutions.

BY JAVEED NIZAMI, SYNITI CTO

PICTURE THIS. You're the CIO of a global consumer goods company and the launch of your flagship product has been delayed by six months. Your team is under pressure because the delay was not due to poor marketing or supply chain issues. The real culprit is fragmented and inconsistent data.

Because the data wasn't properly governed, customer insights live in a legacy CRM, inventory data is buried in spreadsheets, and market research is trapped in a separate analytics platform. Each team has the tools they need, tools that work well on their own but they weren't built to work together.

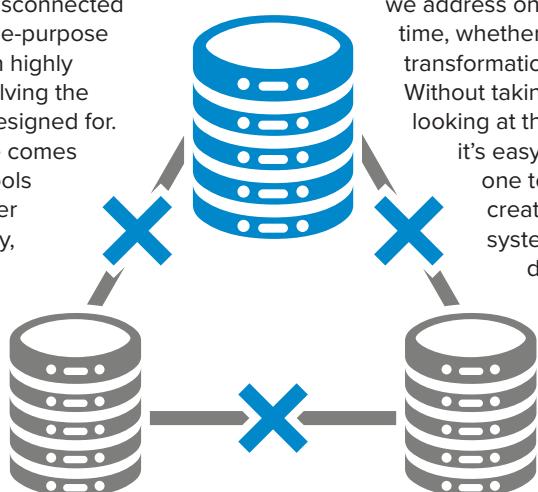
It's a familiar story. Many organisations invest in data management tools to gain control, only to find themselves drowning in disconnected systems. Single-purpose tools are often highly effective at solving the task they're designed for. The challenge comes when those tools grow in number and complexity, without a shared data

to connect them. This often leads to bottlenecks, blind spots and missed opportunities.

The knock-on effects can be considerable, business outcomes suffer, innovation stalls and strategic decisions are made on incomplete pictures. The impact can be even greater during mergers and acquisitions, when independent systems are brought together and expected to produce results.

The hidden cost of fragmentation

It's a common pattern - new tools are brought in to fix new problems. To patch together systems that were never configured to work with each other. The challenge comes when we address one issue at a time, whether that's migration, transformation or analytics. Without taking a step back and looking at the bigger picture, it's easy to implement one tool after another, creating fragmented systems that do not deliver business value. need to



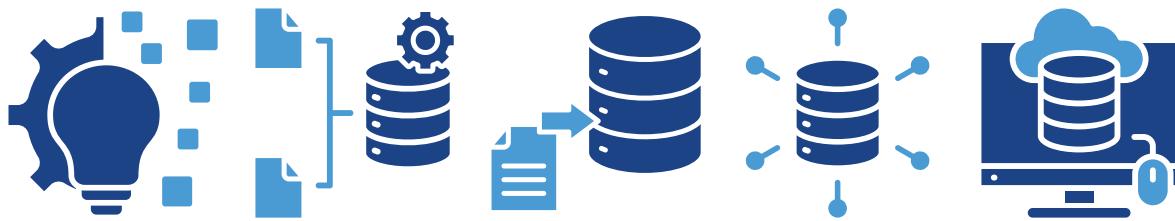
accept that the landscape is complex and data management tools are necessary but without a view of how everything fits together, even well-chosen tools can lead to duplicated effort, inconsistent data and compliance risks.

Organisations that take time to map their ecosystem, identify overlaps and understand how data moves across systems can reveal cost savings and efficiency gains hidden at first glance.

Untangling data chaos to unlock business value

To turn data chaos into business value, CIOs must look beyond individual tools to harmonise data from disparate systems. They need a unified approach that delivers visibility, adaptability and intelligence at scale. This isn't about ripping and replacing everything you have, it's about orchestrating what's already in place and filling gaps with purpose.

But how to start untangling the myriad of tools that have built up over time? A single data strategy that aligns with business goals and understands how data is used and interconnects across the organisation is crucial. The strategy must be adaptable: built for change to adjust to mergers, acquisitions and new markets, including consolidating disparate systems inherited from different organisations. Not to mention new regulations. It has to move from



being reactive to proactive, introducing data quality management, automation and embedded intelligence. And it needs to include business-aligned data governance, with policies that support business outcomes as well as compliance.

A unified platform to support the full data cycle can also help to break down silos, streamline operations and ensure consistent, high-quality data is available across the organisation. This is especially critical when consolidating systems and data from mergers or acquisitions, helping to eliminate duplicated tools and creating a single source of truth. Unified platforms are able to embed analytics, automation and AI into the data lifecycle so teams can act on insights, not just view them and consolidating data into a centralised data lake with consistent data formatting can result in more reliable analytics and a strong foundation for AI-driven insights.

By bringing data ingestion, transformation, storage, analysis and governance into one ecosystem, businesses can respond faster to market changes, make better decisions and unlock new opportunities for innovation and growth.

Turning order into opportunity

A unified approach brings together individual tools so it's far easier to track and manage business-critical data - and the benefits are immediate. Clean, connected data speeds up product development and sharpens market responsiveness.

Trusted insights guide strategic decisions, not just tactical ones. And with unified data enabling smarter personalisation and faster response times, customer experience improves, driving stronger engagement and higher retention.

By building a foundation that scales with your business and tech stack, data management is future-proofed and ready to handle priority changes and data growth.

Start here: laying the groundwork for change

At the start of this article, our CIO was battling with fragmented data. Although it might be too late for them to avoid the delayed launch, it's certainly not too late to start putting their data first. If you recognise that tangle of tools, there are some steps you can take too:

● Evaluate your current data ecosystem

Map out the tools, systems and data sources your organisation currently employs. Include those inherited through mergers and acquisitions to identify overlaps, redundancies and integration challenges. Ask yourself - and teams across departments - what's working well, what's redundant and what critical capabilities or data is missing. This comprehensive assessment reveals opportunities to consolidate systems and improve data quality and accessibility.

● Break the tool-first mindset by aligning with business outcomes

Move beyond simply acquiring new tools to solve isolated problems. Start by clearly defining the business objectives you want to achieve. Understanding the outcomes your organisation is working towards makes it much easier to identify which data is important, which data sets need to connect with each other and which teams need access. This will help to make smarter, more strategic choices about tools and integrations to support unified data management.

● Build buy-in and collaboration across teams

Teams outside the IT department understand the value of data, but can often find transformation like this daunting. Show them how taking a more unified approach will serve them and help them to succeed in their work - no matter what that work is. Engage stakeholders early, communicate clear benefits and foster a shared sense of ownership for success and sustained momentum.

Consider a Data First mindset across business units to accelerate adoption and feedback. These steps can be achieved more easily by introducing a single platform that supports the entire data lifecycle. Bringing data ingestion, transformation, storage, governance and analytics into one cohesive system, helps to eliminate silos, ensure data quality and enable faster, more informed decision-making. This platform is often the backbone of a strong data strategy, enabling organisations to scale confidently and adapt quickly to future needs.

Make your data work for you

The way we use data to make decisions, drive innovation and grow has changed. Single-purpose tools may have helped to solve yesterday's problems, but today's complexity needs connected, strategic solutions.

A unified approach doesn't mean starting from scratch. It means integrating the right tools in the right way, so data becomes more than a byproduct of operations. It becomes a source of strategic advantage.

Imagine what you and your organisation could achieve if your data worked together.

Gartner identifies top trends impacting infrastructure and operations for 2026

Gartner has highlighted the top trends that will have a significant impact on infrastructure and operations (I&O) for the next 12-18 months.

"I&O leaders must be aware of all of these trends and prepare to act on the ones that are most likely to impact their organizations, so that they'll be able to adapt, respond effectively, and drive innovation," said Jeffrey Hewitt, VP Analyst at Gartner. "By understanding the full impact of these emerging trends, enterprises can implement effective tactics to respond, get ahead of the curve, and maximize the value of their I&O operations in 2026."

Gartner identified six key trends impacting I&O over the next year (see Figure 1)

Trend No. 1: Hybrid computing

Hybrid computing is an emergent style that orchestrates across diverse, and sometimes incompatible, compute, storage, and network mechanisms. It enables I&O leaders to future-proof infrastructure investments with a composable and extensible compute fabric, while maximizing the value of emerging technologies by combining their strengths.

"Hybrid computing will force I&O leaders to adopt composable business and technology architecture

as part of a long-term strategy for building systems and applications," said Hewitt.

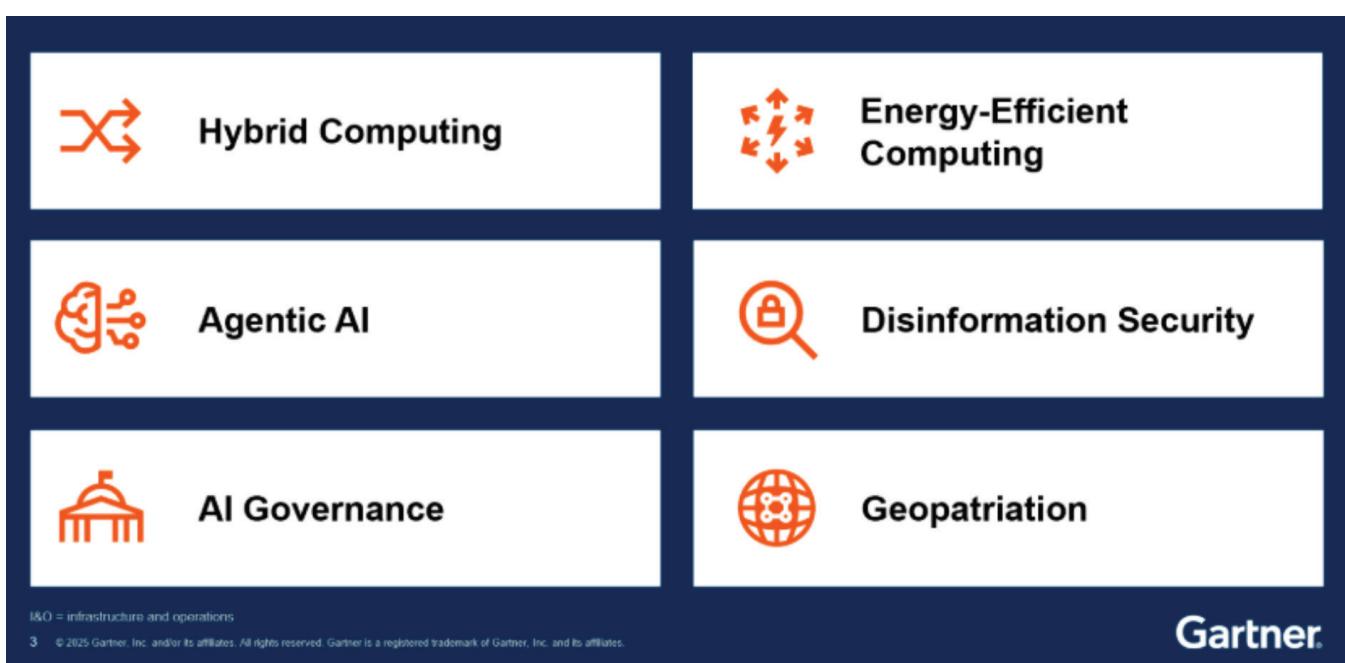
Trend No. 2: Agentic AI

"AI is one of the top three priorities for CIO's, and agentic AI is a very beneficial subset of that," said Hewitt. "Agentic AI provides a significant opportunity for I&O leaders in that it enables performance gains through time savings, which will increase over time as systems evolve. It can support I&O by quickly analyzing complex datasets, identifying patterns and acting autonomously."

Trend No. 3: AI Governance Platforms

AI governance is the process of creating policies, assigning decision rights, and ensuring organizational accountability for risks and decisions related to the application and use of AI techniques. AI governance platforms oversee and manage AI systems by incorporating responsible AI practices.

These platforms also address potential compliance and business risks, including bias,



► Figure 1: Gartner Top I&O Trends for 2026. Source: Gartner (December 2025)



lack of transparency, data protection and privacy issues, model evaluation and validation, and security threats.

Trend No. 4: Energy-Efficient Computing

As a sort of subset of hybrid computing, energy-efficient computing is a package of technologies and practices to reduce the energy consumption and carbon footprint of IT systems.

Energy-efficient computing enables I&O leaders to significantly impact power and environmental aspects in a sustainable way. For example, I&O leaders can create positive business outcomes by implementing tailored long-term strategies using novel and emerging technologies, such as optical computing and neuromorphic systems.

Trend No. 5: Disinformation Security

Disinformation security is a suite of technologies that can address disinformation to help enterprises discern trust, protect their brand and secure their online presence.

It represents an expanding category of technologies and practices, covering deepfake detection, impersonation prevention and reputation protection.

"Given the evolving technology landscape, disinformation security will enable I&O leaders to ensure trust in communications, identity and reputation," said Hewitt.

Trend No. 6: Geopatriation

Geopatriation is the relocation of workloads and applications from global cloud hyperscalers to regional or national alternatives due to geopolitical uncertainty.

"Geopatriation is an extension of a previous trend called 'nationalism versus globalism,' said Hewitt. "Arguably, it goes beyond cloud from just data sovereignty to operational sovereignty to technical sovereignty. Geopatriation empowers I&O to reduce

geopolitical risks and address specific sovereignty requirements. It also enables I&O leaders to support and increase the independence of domestic economies."

50% of enterprises will invest in disinformation security and TrustOps by 2027

By 2027, 50% of enterprises will be investing in disinformation security products or services and TrustOps strategies, up from less than 5% today, according to Gartner.

In the new Gartner book *World Without Truth*, authors Andrew Frank, Distinguished VP Analyst in the Gartner for Marketing Leaders practice; Dave Aron, Distinguished VP Analyst and Gartner Fellow in the Gartner for High Tech Leaders and Providers practice; and Richard Hunter, retired Distinguished VP Analyst and Gartner Fellow, examine how the proliferation of AI-driven misinformation and synthetic media is reshaping the competitive landscape for brands. The authors highlight the urgent need for marketing leaders to anticipate emerging threats and adapt their strategies to safeguard organizational reputation and customer relationships.

"Marketers can no longer afford to treat disinformation as someone else's problem," said Frank. "The proliferation of automated bot networks means that even well-established brands can find themselves at the center of a synthetic outrage storm overnight. Building resilience against these attacks is now essential to protecting both reputation and customer loyalty."

Hybrid computing will force I&O leaders to adopt composable business and technology architecture as part of a long-term strategy for building systems and applications

“ Hybrid computing will force I&O leaders to adopt composable business and technology architecture as part of a long-term strategy for building systems and applications. ”

Jeffrey Hewitt, VP Analyst at Gartner

The book explores the marketing consequences of a world where digital deception is rampant and offers actionable strategies for marketers to protect brand integrity and foster trust in an era of uncertainty:

- Content Verification & Certification: With deepfakes and synthetic media on the rise, marketers must implement verification standards such as Content Credentials to ensure authenticity across all brand touchpoints.
- TrustOps & Cross-Functional Collaboration: CMOs should leverage TrustOps—a holistic, enterprise-wide approach to managing trust through operational policies, technology, and cross-functional teams. Marketing leaders are called to establish Trust Councils and drive transparency as truth becomes increasingly elusive.
- Narrative Intelligence & Media Listening: Marketers need advanced narrative intelligence and proactive media listening to detect, debunk, and counter influence operations before they can

erode brand equity.

- Behavioral Science & Nudges: By applying behavioral science, marketers can cultivate skepticism and critical thinking among consumers and employees, reducing susceptibility to false narratives. “Disinformation is not just a technology or security issue—it is a marketing imperative,” Frank said. “As public trust in institutions and media declines, brands are increasingly vulnerable to targeted disinformation campaigns—including the rapid rise of bot-generated fake brand outrage, which can manufacture viral crises and erode consumer trust in a matter of hours. Gartner’s research shows that while most executives acknowledge the threat, few have made it a strategic priority.”

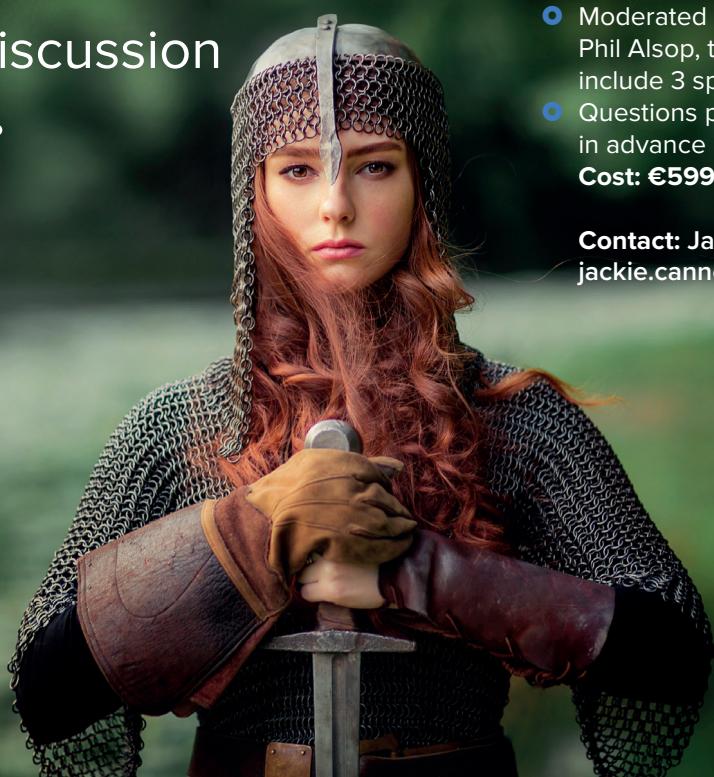
World Without Truth calls on CMOs and marketing teams to elevate disinformation defense to the boardroom, implement industry standards, and advocate for regulatory action.



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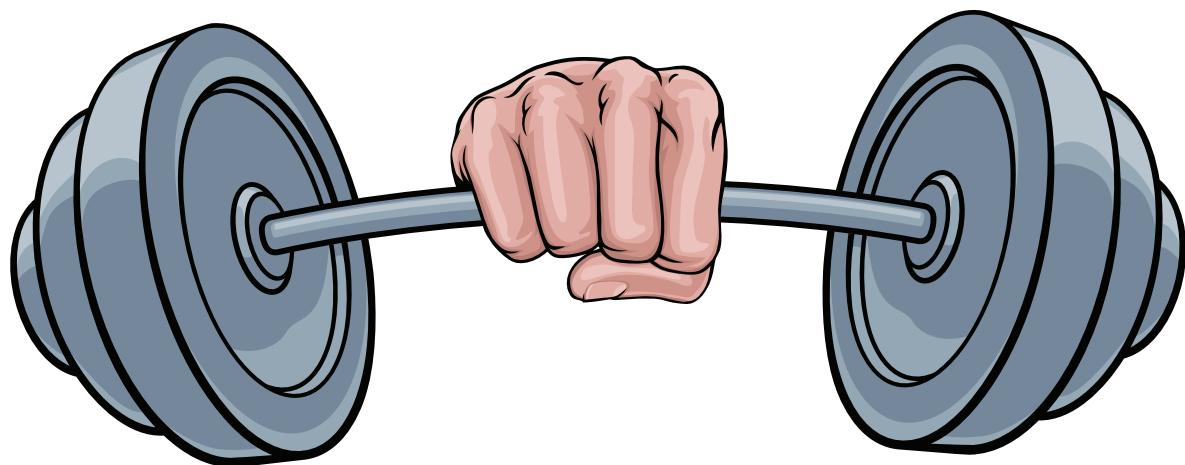
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Worldwide IT market on course for strongest performance since 1996

Worldwide spending on Information Technology (hardware, software and IT services) is on course to post an increase of 14% in 2025, representing the fastest year of growth since 1996 when the launch of Windows 95, expanding PC usage and Internet adoption were the primary drivers of IT spending.

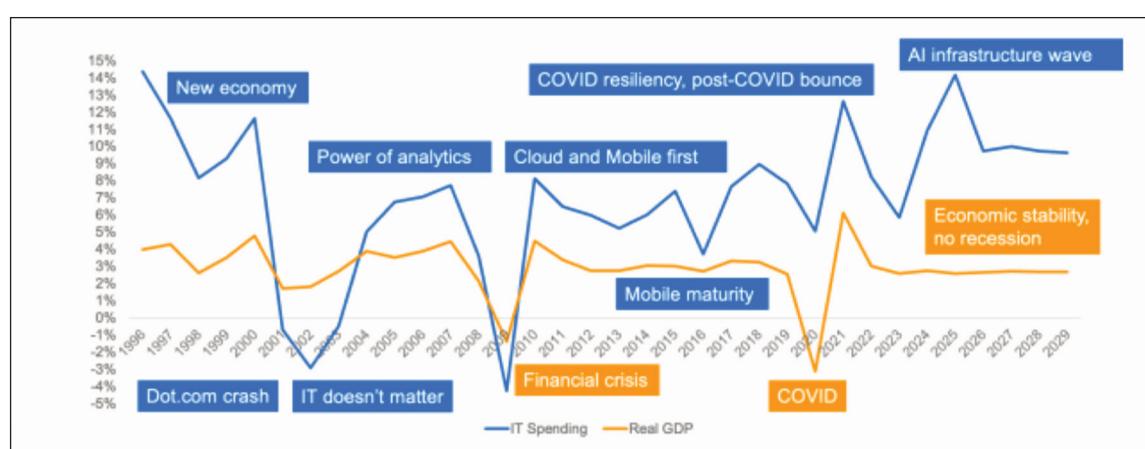
SOME 30 YEARS LATER, the emergence of a massive AI infrastructure investment wave is driving another supercycle of tech spending around the world, with IT spending set to reach \$4.25 trillion this year. Total ICT spending (which includes telecom and business services, in addition to IT spending) will reach almost \$7 trillion this year.

In the latest version of IDC's monthly Worldwide Black Book, which is updated on the last day of every month, this year's IT spending forecast was increased for a 7th consecutive month in

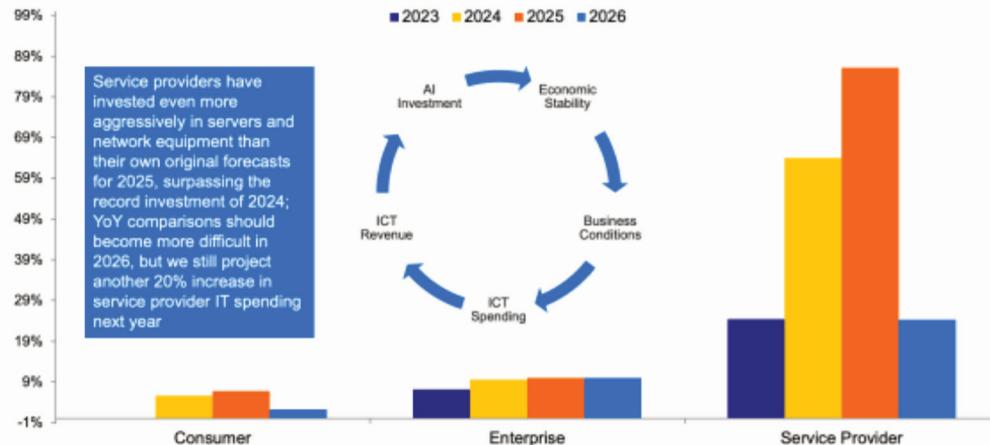
November, reflecting continued over-performance and aggressive investments by service providers in AI infrastructure. This month's forecast increase also reflected strong enterprise software spending, with many organizations continuing with digital transformation and cloud migration projects. Software spending is now expected to increase by 14% this year, with AI deployments adding to investments in security, optimization and analytics.

"AI is the headline of IT market performance in 2025, but most of the actual AI investment this year

► Source:
IDC Worldwide
Black Book
(November
2025) growth
in constant
currency;
excludes
telecom
spending and
business/
OT services.



Worldwide IT Spending Growth by Customer



Source: IDC Worldwide Black Book November 2025 (growth in constant currency); service provider includes hyperscale, cloud, managed services and telecom providers.

is concentrated in service provider infrastructure," said Stephen Minton, Group Vice President at IDC. "This AI investment is partly supported by enterprise spending on core IT products and services, which make up the strong revenue streams of the service providers investing heavily in AI deployment. In turn, this AI investment is supporting economic growth and stability, which in turn is supporting the ability of businesses to maintain their investments in cloud services and enterprise software. As a result, we're currently experiencing a virtuous cycle of tech-driven macroeconomic growth."

IT spending increased by 16% in the first quarter of 2025, partly due to front-loading of PC shipments ahead of anticipated tariffs in Q2, and which represented the fastest quarterly IT market growth in 29 years. While service providers are driving some of this IT market growth, enterprise IT spending increased by 11% in Q1 and 10% in Q2.

Meanwhile, service provider spending on datacenter infrastructure (server/storage and network equipment) is set to post an increase of 86% in 2025, reaching almost half a trillion dollars this year.

While there is much speculation about how and when this cycle may unwind, there is so far no evidence of any slowdown taking hold, and surveys continue to indicate that most businesses plan to increase IT budgets again in 2026, despite lingering anxiety around the overall economy. IDC forecasts that IT spending will increase by 10% in 2026, slower than 2025 but still representing one of the strongest years for the industry since the 1990s.

"There are headwinds and downside risks in the 2026 outlook, including an expected memory component shortage which may drive up PC prices next year," said Minton. "Technology demand has been resilient this year in the face of uncertainty around tariffs and a sluggish global economy, but

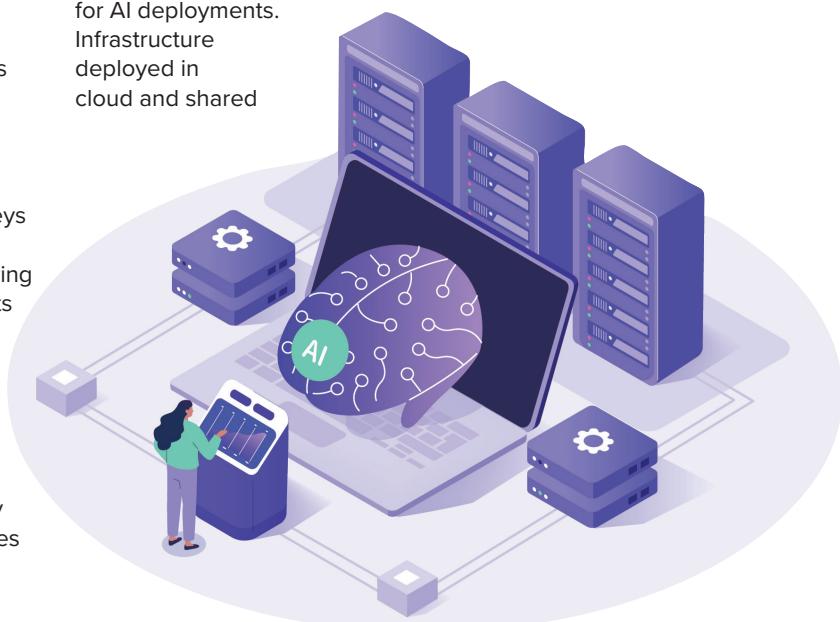
our baseline forecast calls for a stable economy, supported in part by ongoing AI investment. Even in a moderate recession, most IT spending would continue. The likelihood of a 'perfect storm' similar to the IT market crash of 2001 remains low."

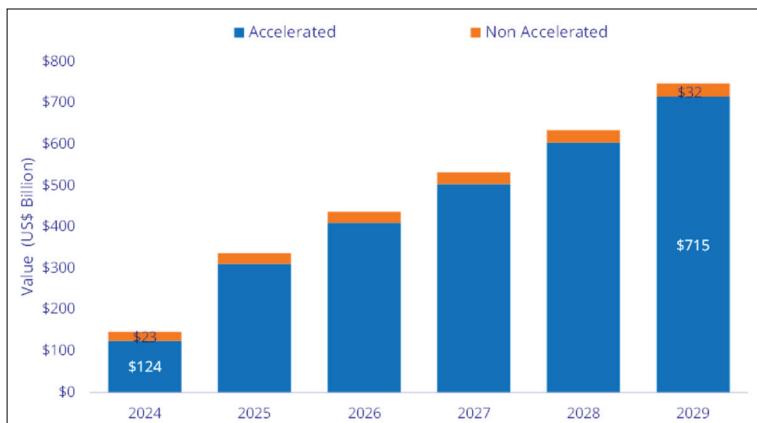
AI infrastructure spending to reach \$758bn by 2029

The global Artificial Intelligence (AI) infrastructure market is on track for unprecedented growth, poised to reach \$758 billion USD in spending by 2029, according to the latest findings from the IDC Worldwide Quarterly Artificial Intelligence Infrastructure Tracker. Organizations increased spending on compute and storage hardware infrastructure for AI deployments by 166% year-over-year in the second quarter of 2025, reaching \$82.0 billion.

The AI infrastructure market has consistently sustained high double-digit growth for a few years, driven primarily by investment in servers for AI deployments.

Infrastructure deployed in cloud and shared





► Worldwide Quarterly AI infrastructure Tracker. Server AI Centric Values US\$Bn 2024-2029.

environments accounts for 84.1% of the total spending in AI in 2Q25, with hyperscalers, cloud service providers and digital service providers as the largest contributors to AI spending (86.7%) in the quarter. In 2Q25, servers accounted for 98% of the total AI Centric spending, growing 173.2% compared to the same period last year. Servers with an embedded accelerator are the preferred infrastructure for AI platforms, accounting for 91.8% of the total server AI infrastructure spending—growing 207.3% in the second quarter of the year 2025. IDC projects that accelerated servers will exceed 95% of the server AI infrastructure spending by 2029, growing at a 42% 5-year CAGR.

Most of the larger changes in the AI server forecast are due to a significant reassessment of GPU and other accelerators' server demand in the US, replacing a previously expected slowdown in late 2025 and early 2026 with a new expectation that the AI investment ramp will continue through the end of this year and into 2026, based on continuously growing pipelines from major vendors and buyers.

"There is a distinct possibility that more AI-related investment will be announced in the coming years that will add to and extend the current mass deployment phase of accelerated servers well into 2026 and even beyond," said Lidice Fernandez, group vice president, Worldwide Enterprise Infrastructure Trackers. "IDC expects AI adoption to be mainly driven by hyperscalers and cloud service providers along with AI based research and education projects gaining importance by the end of the forecast period."

Storage spending in AI infrastructure has been driven by the need to manage large datasets required for training AI models, as well as storage of training, checkpoints and repositories of data for inference phases. This category reported a 20.5% year-over-year growth in 2Q25 with 48% of the spending coming from cloud deployments.

The United States leads the global AI infrastructure market, accounting for 76% of the total spending in 2Q25, followed by PRC (11.6%), APJ (6.9%), and

EMEA (4.7%). Over the next five years, IDC expects the PRC region to grow at the fastest CAGR (41.5%) followed by the USA (40.5%), EMEA (17.3%) and APJ (14.3%). By 2029, IDC forecast AI Infrastructure spending to reach \$758Bn with accelerated servers accounting for 94.3% of the total market spending.

Worldwide External Enterprise Storage Systems market revenue increase

According to the International Data Corporation (IDC) Worldwide Quarterly Enterprise Storage Systems Tracker, the external OEM enterprise storage systems (ESS) market grew 2.1% year-over-year (YoY) in the third quarter of 2025 reaching \$8.0 billion in vendor revenue. From the historical perspective, this level of growth is solid for the mature ESS market but still is eclipsed by the high double-digit growth in the server market, which is driven by investments in accelerated server infrastructure.

Revenue associated with All Flash Arrays showed more dynamic by growing 17.6% YoY while Hybrid Flash Arrays and Hard Disk Drives Arrays declined 9.8% and 6.3% respectively. "The penetration of AI-infused applications and AI models into corporate datacenter will increase the need for more dedicated and efficient enterprise storage systems. IDC expects growing demand for flash storage to support projects related to artificial intelligence, both for training and inferencing," said Juan Seminara, research director, Worldwide Enterprise Infrastructure Trackers.

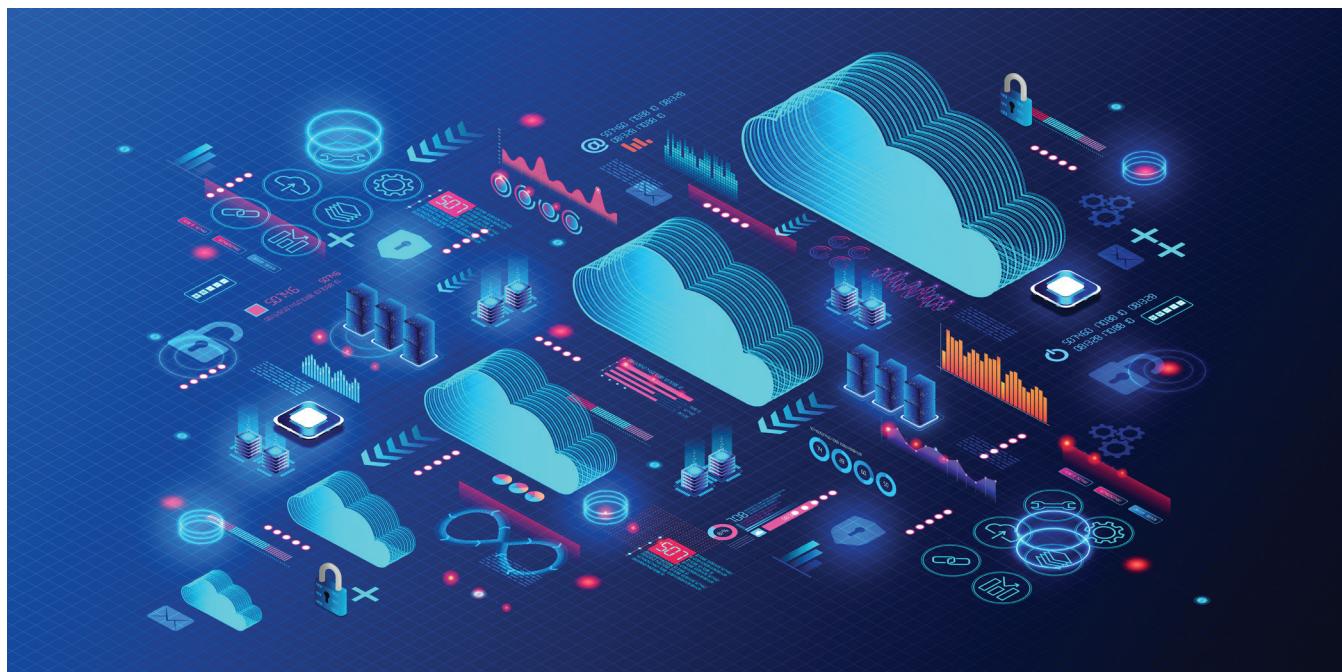
When slicing the market by price bands groups, the fastest growing portion was Midrange (systems with average selling price from 25\$K to 250\$K) that showed 8.1% growth in the quarter that already represents 67.5% of the total external storage market, while High End (systems more than 250\$K) declined 9.0% and Entry (systems less than \$25K) decrease by 8.0%.

External Storage Regional Market Results

Regional view shows disparate performance with double digit growth in Japan, Canada and EMEA that grew 14.4%, 12.6% and 10.5% respectively- PRC and APeJC showed single digit growth of 9.5% and 8.6% while Latin America barely decrease by 0.9%. The negative note of the quarter was USA performance that showed a 9.9% decrease compared to the same quarter of 2024 after a weak performance in the OEM market.

Overall External Storage Market Standings, by Company

Despite a single digit decline, Dell Technologies led the External ESS market with 22.7% revenue share while focusing more on core products, Huawei reached second place with 12.0% revenue share fueled by a very strong performance in PRC market. NetApp finished third with 9.4% share thanks to a solid performance in AFA. Pure storage reached fourth place with 6.8% share due to a double-digit



growth in the quarter. Finally, Hewlett Packard Enterprise was fifth with a 5.6% market share.

Worldwide Server market revenue increases 61%

According to the International Data Corporation (IDC) Worldwide Quarterly Server Tracker, the server market reached a record \$112.4 billion dollars in revenue during the third quarter of the year. This quarter showed another high double digit-growth rate by reaching a year-over-year (YoY) increase of 61% in vendor revenue compared to the same quarter of 2024.

Revenue generated from x86 servers increased 32.8% in 2025Q3 to \$76.3 billion while Non-x86 servers increased 192.7% YoY to \$36.2 billion.

Revenue for servers with an embedded GPU in the third quarter of 2025 grew 49.4% year-over-year representing more than half of the server market revenue.

The fast pace at which hyperscalers and cloud service providers have been adopting servers with embedded GPUs has fueled the server market growth which almost doubled in size compared to 2024 with revenue of \$314.2 billion dollars for the first three quarters of 2025.

"IDC expects AI adoption keep growing at an outstanding pace as major vendors continue reporting record orders and showing strong

backlogs. Hyperscalers and cloud providers are still ahead with new, large deployments that require much higher compute density. Additionally, we started to see major AI based Research and Education projects that will help fuel further growth path in the market," said Juan Seminara, research director, Worldwide Enterprise Infrastructure Trackers.

Server Regional Market Results

The United States is the fastest growing region in the server market with an increase of 79.1% compared to the third quarter of 2024, fueled by a 105.5% growth in the accelerated server segment. Canada grew 69.8% pushed by the same reason. PRC is growing at 37.6% year-over-year growth in 2025Q3 accounting for almost a fifth of the quarterly revenue worldwide. APeJC, EMEA and Japan also showed very healthy double digit growth with 37.4%, 31.0% and 28.1% respectively, while Latin America showed a low single digit growth with 4.1% increase in the quarter.

Overall Server Market Standings, by Company

Dell Technologies clearly lead the OEM market with 8.3% revenue share thanks to an outstanding growth on accelerated servers, Supermicro reached the second place with 4.0% revenue share even though declining 13.2% compared to 2024Q3. IEIT Systems and Lenovo statistically tied* for the third position in the market with 3.7% and 3.6% share respectively while Hewlett Packard Enterprise finished in the fifth position in the market, with 3.0% share.

This quarter showed another high double digit-growth rate by reaching a year-over-year (YoY) increase of 61% in vendor revenue compared to the same quarter of 2024.



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