Not your Average
AI-Generated Trend Report.

‘A lot is happening, but nothing is happening.’

2026 Trend Report

With insights from our partnership leadership:

aws Microsoft Google Cloud servicenow

ATLASSIAN databricks NVIDIA snowflake

About Devoteam

Devoteam is a premium consultancy firm driving digital business and transformation through innovative technology.

Tech native for over 30 years, we deliver lasting results in Cloud, Data, Cyber and AI for industries and public institutions across EMEA.

At Devoteam, tech entrepreneurship is at the core of our values, fostering our spirit as a learning company. Within this culture, we attract and train top professionals, creating high talent density across our 11,000 specialists. Strong partnerships have always been central to our DNA, which is why we collaborate closely with both well-known tech giants and emerging innovative startups. This ecosystem enables us to provide long-lasting solutions that help clients lead in their industries.

AI-driven tech consulting

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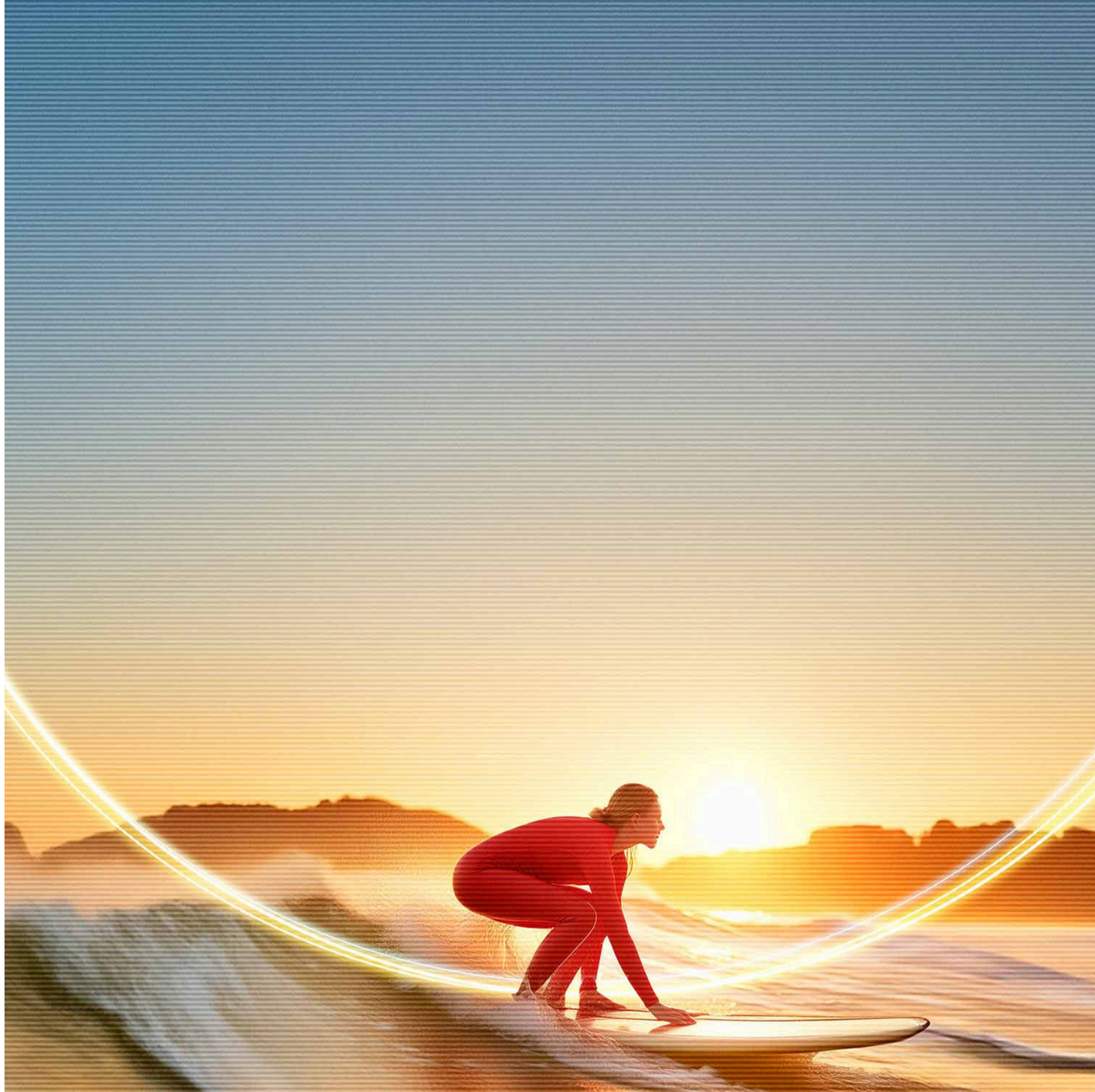


‘A lot is happening, but nothing is happening.’

As Devoteam's content team, we are constantly witnessing the pace of technological evolution. It is a dynamic where much seems to change while fundamental shifts are still taking shape. This trend report is here to prepare you for 2026, offering the perspectives from our top leadership and insights drawn from our award-winning partnerships. These partnerships are the very alliances that empower us to deliver the latest innovations to you, our customers.

A lot is happening

The AI market has pivoted from hype to execution. Generative AI commoditised in a single year, replaced by autonomous agents that execute complete tasks end-to-end. The speed shocked even industry leaders.

Technology is moving fast, and the stock market shows it is prepared and available. Technology giants' stock values, paired with the relentless introduction of new capabilities, affirm that advanced tools are widely available.

Business models are being rewritten. Vendors are abandoning headcount-based proposals and "lift and shift" migrations. The new currency is outcome-based value: what AI actually delivers, not what it promises.

Sovereignty demands are reshaping infrastructure. Geopolitical tensions force organisations to choose platforms that guarantee data residency and control. AWS Sovereign Cloud and similar offerings are strategic responses to a fractured global landscape.

Change management is now a technical requirement. Digital transformation frameworks recognise the 90% psychology, 10% technology split. Without addressing human adoption, technical capability means nothing.

But nothing is happening

Garbage in, garbage out remains undefeated. Data governance hasn't become optional just because AI is powerful. It is still non-negotiable. Poor data foundations still kill projects.

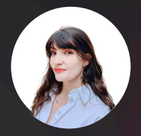
Security cannot be compromised. AI introduces new attack vectors, but the principle stays constant: cybersecurity is a baseline investment, not a nice-to-have.

Technology alone solves nothing. 95% of AI investments are failing. Companies poured billions into AI projects that delivered no ROI. This rate proves that throwing AI at broken processes produces broken AI processes. People, workflows, and organisational readiness still determine success.

IT gatekeeper mentality still blocks progress. Despite calls to retire it, resistance from legacy IT departments continues to slow modernisation efforts across enterprises.

Platform lock-in concerns persist. While vendors unify their ecosystems, organisations still face the same strategic question: which platform becomes their foundational dependency?

We wish you an interesting read and a successful 2026, rich with projects that transition seamlessly from concept to full production.



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Has Generative AI Already Peaked, or Is Agentic AI the Real Breakthrough?

With AWS Experts
Bruno Mota and Nuno Ferreira

TLDR

Biggest Surprise of 2025: The evolution from GenAI to Agentic AI and the speed at which GenAI became commoditised.

2025 Business Shift: AWS funding strategy shift.

2025 Critical Lesson: Commitment must be KPI-based.

Overhyped Technology in 2025: Amazon Q saw limited use cases, LLMs may be approaching a technological ceiling.

Customer Conversation Shift in 2025: Discussions are shifting from basic AI adoption to complex governance.

Legacy to Retire in 2026: The transactional approach of building isolated, non-scalable POCs.

Biggest Challenge for 2026: Demonstrating Return on Investment.

Non-Negotiable Investment for 2026: Agent Core and securing data platforms for multimodal AI.

AWS Experts: "95% of customers are not achieving the expected ROI" on AI, and the problem is not the technology.

Experts

Bruno Mota
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Bruno Mota is the CEO of Devoteam in Portugal and Global AWS Business VP. In addition to his management responsibilities, he has founded and supported the launch and growth of seven technology-focused brands and startups. Currently, as an executive and entrepreneur, he is the Managing Director responsible for the Devoteam's management and strategy in Portugal, which has over 1400 employees.

Nuno Ferreira
Director of Technology for AWS Business Unit
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Nuno Ferreira is a Senior Technology Leader with over 20 years of experience combining strategic vision with deep technical expertise. Proven track record of accelerating business growth through innovative technology solutions and digital transformation initiatives. Currently driving Devoteam AWS business growth and market presence through AWS Strategic Alliance, enabling enterprises to achieve operational excellence in their cloud and GenAI transformation journey.

In just six months, generative AI has gone from a breakthrough to a baseline. What AWS called revolutionary in March became commoditised by September. A pace of change that caught even seasoned cloud partners off guard.

This Trend Report captures a pivotal moment in cloud evolution through two distinct lenses: Bruno Mota's business strategy perspective and Nuno Ferreira's technical architecture view. Together, they dissect the year's surprises, missed expectations, and the hard truths about AI adoption, including why 95% of customers still can't prove ROI on their AI investments.

From the rapid leap to agentic AI to the emergence of AWS Sovereign Cloud, from funding model shake-ups to the looming limits of LLM technology, this conversation reveals where AWS and its ecosystem are heading in 2026, and what it will take to get there successfully.

2025: Reflections & Lessons Learned

What was your single biggest technology surprise of the last year?

Bruno Mota: While not entirely surprising, the focus AWS brought to the AI and GenAI space was the most significant development. For Devoteam, Achieving launch partner status for GenAI enabled us to support numerous POCs and MVPs for our customers. This acceleration was beneficial for both our practice and the broader market.

Nuno Ferreira: Two aspects stood out. First, AWS was among the first to adopt generic LLMs. Second, the rapid evolution from GenAI to agentic AI was unexpected. We achieved GenAI launch partner status in March, and by year-end, AWS had completely shifted focus from GenAI to agentic approaches.

The pace was remarkable, we anticipated GenAI would remain central for at least two years, but within six months, it became commoditised. The market now views GenAI as a standard capability rather than a differentiator. At re: Invent this year, GenAI will likely be referenced minimally, if at all, as the industry has moved beyond it as a focal point.

What technology or trend do you believe was the most overhyped in the last 12 months?

Nuno Ferreira: Amazon Q generated considerable buzz, although our reality may differ from that of other partners. While many adopted it, we found limited use cases within our customer base. This doesn't indicate overhype necessarily, but rather a mismatch with our specific client needs.

> **While we have successful cases, most POCs and MVPs don't transition to production. We need to help customers understand the importance of committing to next steps beyond the initial proof of concept.**
>
> - Bruno Mota

What is the single most important business lesson you learned in the last 12 months?

Bruno Mota: Despite strong alignment with AWS and available funding, we're not consistently converting smaller projects into operational deployments. While we have successful cases, most POCs and MVPs don't transition to production. We need to help customers understand the importance of committing to next steps beyond the initial proof of concept.

Nuno Ferreira: Customers view funding as a risk-free investment. Without financial commitment, they face no consequences for discontinuing a POC. This makes it difficult to secure production commitments. We need to establish KPI-based agreements where achieving specific metrics obligates customers to move forward.

Another lesson concerns market segmentation. Countries have distinct cultures, some are enterprise-focused, others target SMB. France, with its enterprise culture, struggles to enter the SMB market. The UK faces the opposite challenge: an SMB culture attempting to move into enterprise. These cultural differences create operational challenges even within the same partnership.

2026: Future Focus & Strategy

What is the single most critical tech change happening within your core area right now, and why is it a game-changer for our customers?

Bruno Mota: The shift from GenAI to agentic AI will occur rapidly. Investment in hardware and chips continues, not just from AWS directly but through ecosystem partnerships with Nvidia, OpenAI, and others. The interconnected funding between these companies, Google, Microsoft, AWS, OpenAI, Perplexity, represents trillions of dollars circulating among the same partners. These strategic bets on combined capabilities will shape the landscape.

Nuno Ferreira: AWS Sovereign Cloud, launching in Germany this December, addresses data sovereignty concerns. With current geopolitical developments and data privacy considerations, this European-based infrastructure, staffed entirely by European personnel and disconnected from the public cloud, targets defence, healthcare, and banking sectors. The higher cost may limit adoption, particularly as some customers are returning to local data centers for sovereignty reasons.

AWS's investment in the Middle East also indicates recognition of growth potential that may exceed current European opportunities.

What is your 12-month non-negotiable technology investment priority, and what is the biggest business risk if we don't execute it?

Bruno Mota: Customer maturity varies significantly. The most advanced are exploring agentic AI, while many are still determining how to leverage AI generally. We need to serve both segments, bringing advanced expertise to mature customers while helping others with foundational elements like data organisation and governance frameworks.

> **“ Investment in hardware and chips continues, not just from AWS directly but through ecosystem partnerships with Nvidia, OpenAI, and others.**
>
> - Bruno Mota

Nuno Ferreira: AI requires proper data infrastructure. Previously, data platforms focused on organisational reporting with structured databases. The AI paradigm requires multimodal databases supporting various formats, images, PDFs, and unstructured data, all accessible to LLMs.

Governance has expanded beyond access control. Customers now consider whether private data trains models, whether bias exists, whether AI operates ethically, and whether personal information is embedded in models. The main risk of inadequate data platforms is poor AI products, agents that hallucinate, provide incorrect information to customers, or produce outputs that damage credibility or appear discriminatory.

Bruno Mota: Beyond services, AWS is changing its funding strategy. They recognised that providing extensive funding without ensuring return on investment wasn't sustainable. The revised approach requires greater commitment from both partners and customers to deliver measurable results.

What is the biggest customer challenge today?

Bruno Mota: Return on investment. Despite substantial investments and activity, customers struggle to demonstrate value to their boards. While some succeed, approximately 95% of customers are not achieving the expected ROI from their AI investments.

Nuno Ferreira: Many customers approach AI incorrectly. CIOs face pressure to show AI adoption, leading them to pursue the first available use case without a strategy. The proper approach is to identify business value cases, prioritise by value and data maturity, then use the first case to build a scalable data platform with appropriate security and ethical guardrails.

Instead, customers often build isolated POCs without production-ready quality or scalability. When the POC completes, it lacks the infrastructure to expand. They compare their two-week POC to mature products like ChatGPT, become frustrated by the quality differences, and struggle to scale to additional use cases. This transactional rather than strategic approach limits the success of AI adoption.

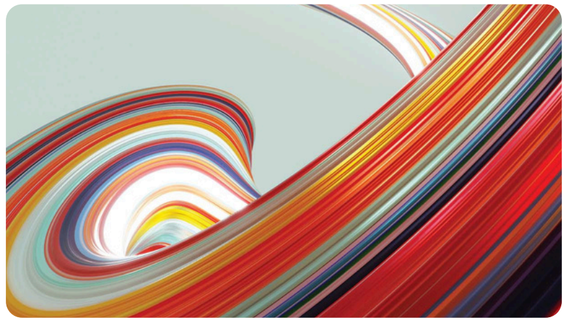
> **“ While current AI technologies remain valuable and will continue generating returns for the next two to three years, the industry is approaching a technological ceiling.**
>
> - Nuno Fereira

What is the next major AI topic?

Nuno Ferreira: Recent statements from Yann LeCun, Meta's head of AI, indicate a shift away from LLMs. His assessment is that current AI technology has limited evolutionary potential. The autonomous AI capabilities many expect from today's technology, natural interaction and full autonomy, won't materialise with current LLMs, GenAI, or agentic approaches.

This has prompted exploration of alternative technologies, including quantum computing, to determine future directions.

While current AI technologies remain valuable and will continue generating returns for the next two to three years, the industry is approaching a technological ceiling. We anticipate significant new developments within the next six to twelve months as the field searches for the next breakthrough beyond current limitations.



What sets AWS apart from its competitors?

Bruno Mota: AWS was the first cloud provider, giving it traction in many markets, though not universally, as Microsoft dominated early in countries like Portugal. AWS historically took a technology-first approach, while Google and Microsoft sometimes prioritised business relationships. The market perception that AWS lagged because it lacked equivalents to ChatGPT or Gemini has shifted as AWS focuses on specific niches and capabilities.

Nuno Ferreira: Cloud providers are generally neck-to-neck technologically. AWS has stronger enterprise maturity due to its longevity. Their partnerships with other technology providers are notable, AWS runs more Windows workloads than Microsoft, despite being a competitor. Partnerships with Snowflake, Databricks, and ServiceNow allow AWS to scale and complement its offerings.

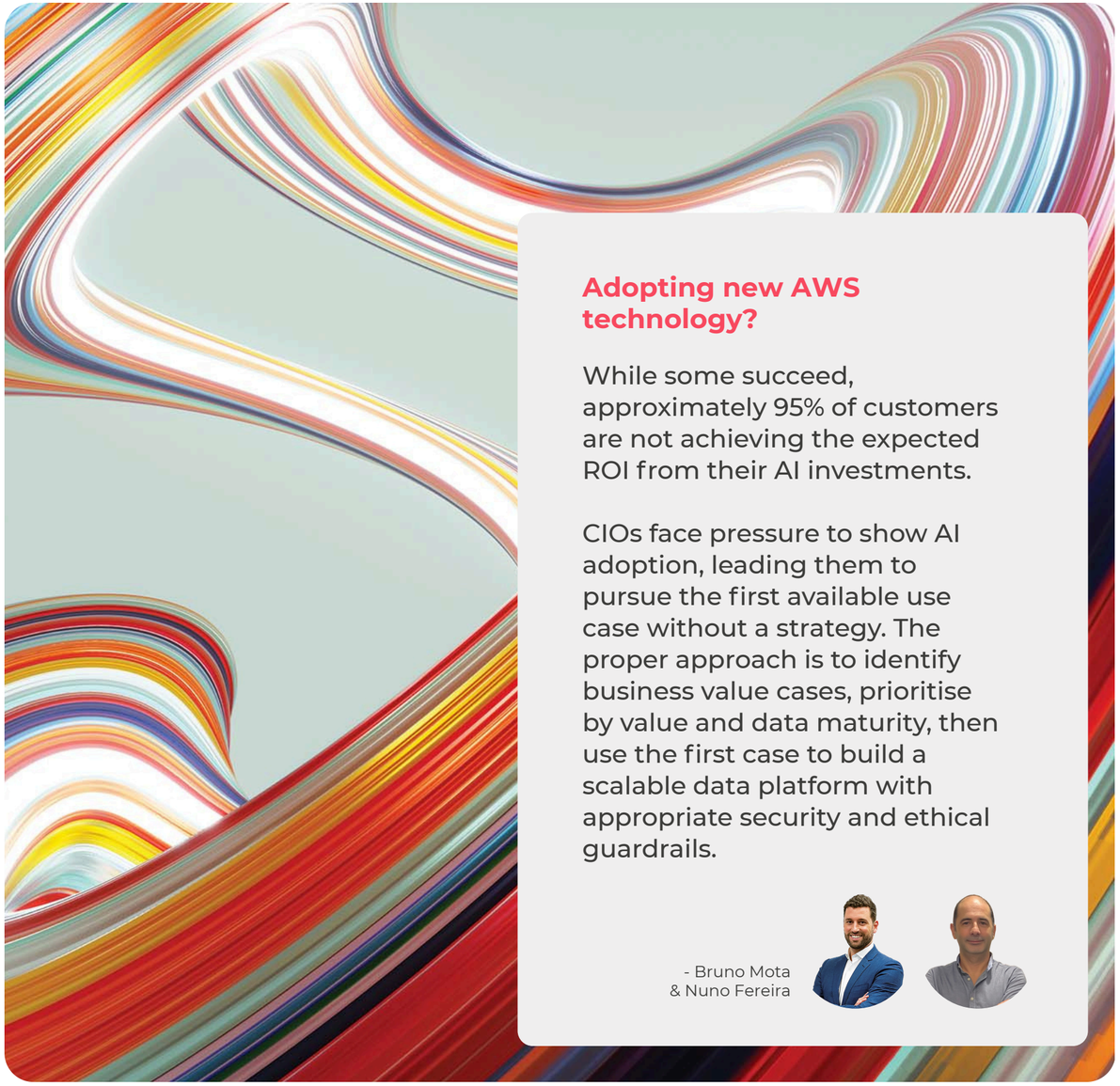
The pace and maturity of AWS's product releases are noteworthy. Unlike some technology partners that rushed to market with immature AI solutions, AWS maintains a rapid innovation cycle while delivering high-quality services from launch.

Top 3 Technology Highlights

AWS Sovereign Cloud
The European sovereign cloud launching in Germany addresses data sovereignty and privacy concerns with dedicated infrastructure and personnel, targeting defense, healthcare, and banking sectors.

Agent Core
Recently launched, this platform enables the development and deployment of agents and multi-layered agents within an integrated environment. Expect continued evolution and strengthening throughout 2026.

SageMaker Studio
As the middle layer of AWS's three-tier AI infrastructure, SageMaker Studio will continue evolving. Deeper integration with partner technologies, particularly Nvidia's services, will expand the AI ecosystem within AWS.



Adopting new AWS technology?

While some succeed, approximately 95% of customers are not achieving the expected ROI from their AI investments.

CIOs face pressure to show AI adoption, leading them to pursue the first available use case without a strategy. The proper approach is to identify business value cases, prioritise by value and data maturity, then use the first case to build a scalable data platform with appropriate security and ethical guardrails.

- Bruno Mota
& Nuno Fereira

Use Case: From Hours to Minutes - How DREST Scaled Luxury Fashion Content with AI

DREST, a luxury fashion styling app featuring 300+ high-end brands, struggled with a manual content creation bottleneck. Their designers spent half a day per person editing clothing assets onto model images using Photoshop-like tools, requiring five full-time staff and six months to train new team members. This manual process limited scalability while maintaining the exceptional quality luxury brands demanded.

Through AWS's ADAPT program and Strategic Collaboration Agreement funding, Devoteam built an AI-driven solution in just five weeks. The project evaluated multiple AI models and delivered "Dresty," a prototyping platform giving DREST's team self-service access to test AI models. Built on AWS infrastructure including Fargate ECS, Lambda, and S3, the solution demonstrated excellent image quality and processing speeds of approximately one minute per image.

The proof-of-concept successfully validated AI feasibility while establishing a scalable foundation for future growth. DREST now has a reusable framework for ongoing AI model evaluation, positioning them as innovation leaders in digital fashion. As CTO Chris Wright noted, Devoteam not only met their quality threshold but delivered a tool enabling continuous testing of new models as they become available.

Use Case: SportsShoes.com Migrates Critical Fulfilment Platform to AWS Without Disruption

SportsShoes.com, an online running and outdoor gear retailer, needed to migrate its critical fulfilment platform SystemX from an aging on-premises data center to AWS. The legacy system ran on MySQL 5.7 and PHP 5.6 with minimal monitoring, making issue diagnosis difficult. The company needed to maintain business continuity while ensuring secure connectivity for warehouse operations and third-party integrations.

Devoteam containerized applications to Amazon ECS and migrated databases to RDS using AWS Database Migration Service. The team established secure connectivity through Site-to-Site VPN and Transit Gateway, while implementing Infrastructure as Code with AWS CDK for multi-environment provisioning. CloudWatch provided centralized monitoring and alerting capabilities the company previously lacked.

The migration achieved zero disruption during cutover, with improved application uptime and faster deployments. SportsShoes.com now operates on a resilient, scalable cloud architecture. Future plans include migrating to serverless technologies, upgrading to MySQL 8.0 to avoid $3,000+ monthly Extended Support costs, and optimizing spending through right-sizing and AWS commitment plans.

Google Cloud

Why Is Change Management the True Success Factor for Every AI Project?

With Google Cloud Experts
Valon Rexhepi and Jason Quek

TLDR

Biggest Surprise of 2025: The rise of AI Agents and the speed of technology.

2025 Business Shift: GSIs are rethinking delivery, leading to tactical layoffs of junior staff.

2025 Critical Lesson: Change Management is paramount; without it, AI adoption fails, resulting in poor ROI.

Overhyped Technology in 2025: Completely replacing humans with AI and the Digital Twins.

Customer Conversation Shift in 2025: AI is now a boardroom topic, focusing on governance and full autonomous processes, not just IT.

Legacy to Retire in 2026: Stop focusing on headcount; move to outcome-based value and modernisation. Retire "Lift and Shift".

Biggest Challenge for 2026: Ensuring high adoption and usage of new AI tools to deliver ROI.

Non-Negotiable Investment for 2026: Gemini Enterprise and Code Assist.

Why Is Change Management the True Success Factor for Every AI Project? With Google Cloud Experts Valon Rexhepi and Jason Quek

Experts

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Valon Rexhepi is the SVP of Devoteam Google Cloud Business Unit. A dedicated Cloud evangelist and early adopter. He has been a passionate promoter of Google Cloud solutions for over a decade. His focus is helping customers build cultures of innovation and getting the most out of Cloud technology.

Jason Quek
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Jason Quek is the CTO at Devoteam Google Cloud Business Unit. He is the technical architect behind Devoteam's strategic partnership with Google Cloud, accelerating cloud adoption and innovation globally. With 13/13 Google Cloud certifications, he guides teams in AI/ML, Data, and Datacenter Modernisation, driving immediate customer value.

Google Cloud

2025: Reflections & Lessons Learned

What was your single biggest technology surprise of the last year?

Jason QUEK: For me, it has to be Agents. This topic is now arising ten times an hour with every company we talk to. Everyone is interested, or at least feels they need to use them. They may not know how to use them, but they are all thinking about it and are worried they will be outperformed by the competition if they don't.

Valon REXHEPI: To me, it is the sheer speed at which Generative AI (GenAI) has moved. It went from being a curiosity, something fun where people experimented with image generation, to enterprises actually adopting it at a very rapid pace. This was a huge surprise. We see this rapid AI adoption in HR, marketing, finance, and even very traditional industries like insurance or law, helping draft or review contracts. The speed is crazy.

Which competitor's strategic move truly surprised you, and what did you learn from it?

Jason QUEK: For me, it was how Global System Integrators (GSIs) & Regional System Integrators (RSIs) fully transitioned into GenAI about a year ago and front-loaded their entire pipeline with AI projects. They made sure they got into the pipeline faster than anyone else.

Valon REXHEPI: From a public relations perspective, the very big GSIs made bold statements of investing millions, even billions, of euros into building AI skills. That play on AI is smart. What doesn't surprise me, though, is that they are laying off massive numbers of people right now. They understand AI is changing the way companies buy. Today, it's about playing it smarter. With AI usage, you can sometimes increase your output three, four, or five-fold. For example, Code Assist solutions massively boost developer productivity. This shift is radically forcing every service provider to rethink how they will deliver service tomorrow.

Customers are now more informed; they expect you to do things faster. The biggest business lesson here is that laying off people is a tactical move. They are removing the lower, junior level of their pyramid, which is currently at risk of being replaced by AI. This layoff is also dangerous because it cuts off the beginning part of the talent pool, threatening the business's long-term health.

> **If you're not taking care of the people and change aspects in your AI projects, your AI projects will fail.**
>
> - Valon Rexhepi

What technology or trend do you believe was the most overhyped in the last 12 months?

Valon REXHEPI: I think the whole idea of a digital twin was overhyped. At one point, every company wanted one to manage and digitise their entire physical operation. It doesn't bring that much value. It is very complex, takes a huge amount of money, and most companies are not even at the stage where they know their core business problems well enough to justify that investment. It looks appealing, but it delivers less or not enough business value.

Jason QUEK: I think replacing humans completely with AI is still overhyped. They talk about singularity or General AI (AGI) intelligence. Models have become very specialised in certain topics, but we can still see the difference between a human's output versus a machine's in terms of creativity and impact. It still requires a human to tie all these things together. Using AI in the right place is correct, but having it as a one-size-fits-all solution for all problems is not yet possible.

What is the single most important business lesson you learned in the last 12 months?

Valon REXHEPI: The importance of change management. We always neglect it, or at least we don't spend enough time on it. We know that if you don't do change management correctly, the adoption of the tool will be minimal. If you're not taking care of the people and change aspects in your AI projects, your AI projects will fail. You must shift the minds of the people and encourage them to adopt technology responsibly.

Jason QUEK: This is key because who are you selling AI to? You're selling AI to the users. The one generating the revenue is the human. We need to help get AI embedded into their daily life. How do we build it in a way that you can't live without it? A simple lesson we've always known is that everyone's opinion matters in making this valuable, but I feel that many of these new AI products are being built without the user in mind.

2026: Future Focus & Strategy

What is the single most critical tech change happening within your core area right now, and why is it a game-changer for our customers?

Jason QUEK: The critical change is the automation piece. For example, in marketing, if you are using an AI-assisted tool to generate a new article, it will take you a day versus a week. Any employee or consultant not using this tooling will automatically lose to the competition in terms of speed and performance. It's a game-changer for our customers because it significantly impacts how quickly a project can be completed. Everything is happening much faster.

Valon REXHEPI: For Europe specifically, the rise of geopolitical tensions means a lot of companies are trying to understand how they can be more sovereign. Google responded well by bringing in the sovereignty topic in many countries and regions where we operate. This brings organisations the peace of mind that they have a choice if they have specific jurisdiction or data residency requirements. It just underlines the need for innovation, to not stay behind, but stay ahead of the competition.

What is your 12-month non-negotiable technology investment priority, and what is the biggest business risk if we don't execute it?

Valon REXHEPI: I have two. The first is Gemini Enterprise (formerly Agentspace). We have to double down and continue to invest. Although the technology is not yet 100% mature, it will be there because Google's top leadership is prioritising it as the platform to host, govern, secure, and monetise all of your agents. The second is Cyber Security. With all the investments Google has made, they have a very complete security offering, and we need to ensure we execute well on this to complete our market offering.

Jason QUEK: Our non-negotiable is Code Assist. We need to integrate AI usage into all our projects, examining every step, from assessment to planning, deployment, and evaluating how we can utilise AI effectively. The biggest business risk is an internal shift in how we price and charge for our services. If we execute this, our risk becomes: How do we ensure customers pay for the value delivered, rather than just the time and materials? We're not selling just consultants anymore; we're selling outcome-based value.

> **“ The biggest challenge we’re seeing is usage. You can buy as much technology as you want, but if you don't use it, there’s no point.**
>
> - Jason Quek

What is the one legacy system or way of thinking we must completely retire in the next two years to remain a market leader?

Valon REXHEPI: We should stop with the typical 'Lift and Shift' scenarios. We have been talking about the cloud for more than a decade, and I still see customers simply moving their on-premise into the cloud. You're not taking advantage of anything, and the Total Cost of Ownership is often not positive. We must retire that way of thinking and instead focus on: How do we modernise?

Jason QUEK: The way of thinking we must retire is focusing on headcount or body count in proposals. We need to adopt a collaborative approach, working with the customer, to explore how our consultants can generate and create additional business revenue streams. Our consultants must have the total package to help them do that, rather than just being a person there to fill out a number or sit in a specific box to perform a single action.

How has the rise of AI fundamentally changed the conversation you have with customers today compared to one year ago? What is the next major topic for customer conversations in the coming year?

Valon REXHEPI: The biggest shift is in the stakeholders. We used to engage with CIOs and technical people. The rise of AI has made this a board-level conversation or a business conversation. Our stakeholders are shifting their focus to the business side, rather than pure IT. The next major topic will be: How do you make the process more autonomous and end-to-end? It's not just a few models or loose-coupled pieces of a process anymore.

Jason QUEK: A year ago, the conversation was about classical machine learning regression, prediction of values. Now, it's more integrated into the entire product chain. It has also made customers a bit more confused about what to choose. Therefore, many of the questions now are about AI governance. How do you handle it, how do you govern it, and what should I have in place to test out this new technology?

What is the biggest challenge for our customers today, and what is the one consistent frustration you hear that we are still not solving effectively with technology?

Jason QUEK: The biggest challenge we’re seeing is usage. You can buy as much technology as you want, but if you don't use it, there’s no point. Customers have great ideas, but when you release the solution, you get a very small amount of adoption and usage. This will lead to a very uncomfortable ROI question next year. We can’t solve this with technology alone; we have to solve it with understanding the users and being creative about the tool's usage, finding that "spark of joy”.

Valon REXHEPI: One of the biggest challenges is balancing the speed of AI innovation with running an enterprise. It's going so fast, and a company still needs to make money; they cannot just supercharge everything with AI from the beginning. The biggest frustration is indeed the low uptake once they have it. How do you ensure you get the maximum ROI for whatever you’re building? Another frustration is that new products emerge every month, so there is always more to be added, which creates confusion for the end-user.

What sets your technology or solution set apart from our competitors in the market today?

Valon REXHEPI: For us, it is our focus and specialisation as a strategic partner. We are deeply involved in co-innovation and are early adopters. Many other partners want to be in the space where we are now. This means we did something right five years ago when we launched our pillars, which were super-specialised, went very deep in certifications, and structured our teams in a unique way with our 'tribes.' We are an example to many of our competitors.

Jason QUEK: Agreed. We are moving much faster than our competitors in the market, and we are not suffering as much in terms of focus. Once we set our minds on something, we can all come together from across the globe to focus on that one thing.

Top 4 Technology Highlights

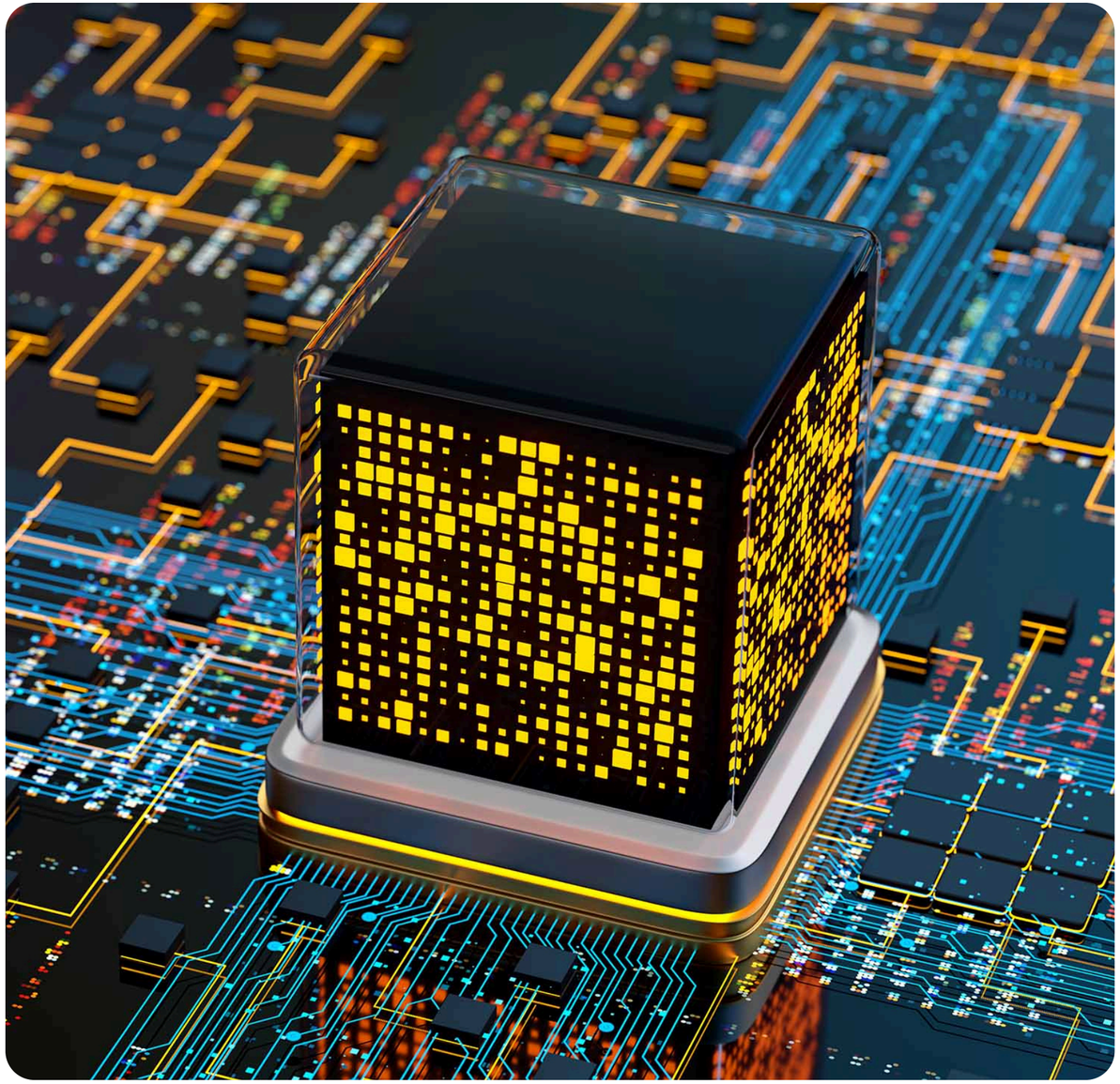
Google Cloud

Gemini Enterprise
A unified platform to host, govern, secure, and deploy all of a company's custom AI agents. It simplifies a very confusing landscape (currently four different Gemini apps). One single place makes it usable and scalable for the enterprise. The first step is to focus all our AI go-to-market and delivery efforts on this single, unified product.

Gemini Code Assist
AI-powered tooling integrated into the developer environment (like VS Code) to generate code and help deploy solutions. It is a non-negotiable investment that blends AI into our developers' day-to-day work, dramatically improving productivity and speed. The first step is to install it into all developers' VS Code environments for every new project and make its usage mandatory.

Google Security Operations
Google's complete cybersecurity offering, including acquisitions like Wiz, which helps manage and secure cloud environments. Security is an "invisible product", if you haven't been breached, something is going well, but it needs to be talked about. This is a complete, validated setup, even at the most stringent levels (e.g., banking). The first step is to promote it and ensure we are certified and experts in its deployment, especially in highly regulated industries.

Project Mariner
An Alpha project that mimics a user's action on any user interface (e.g., you prompt it to register on a website and buy a ticket). It has transformational capabilities for modernisation and automation because it bypasses the need for deep integration with APIs, making it a much faster and more interesting technology to automate processes. The first step is to keep a close watch on its development and be the first to test and co-innovate once it moves to Beta.



Use Case: Spotify Rolls Out Gemini Across 9,000 Employees Globally

Spotify, the world's leading audio streaming platform, sought a secure, scalable AI solution to boost employee productivity while upholding stringent AI Ethics standards. Their goal was to implement technology that genuinely benefited all 9,000 staff members.

Devoteam facilitated the integration of Google Workspace with Gemini for their employees. The team designed and launched a successful pilot programme, followed by a full-scale rollout. Devoteam created tailored, interactive training modules and a digital adoption campaign for all staff.

Gemini is now an integral tool that actively takes meeting notes, supports brainstorming, and saves considerable time, significantly enhancing collaboration across the business.

Use Case: Nordnet Lowers Security Costs & Maximises Threat Visibility with Google Security Operations

Nordnet, a digitally advanced Nordic bank specialising in savings and investments, struggled with high costs and complexity from its inadequate on-premise SIEM solution. The bank's goal was to migrate to Google Security Operations (formerly Chronicle) to enhance security visibility, improve compliance, and significantly reduce operational expenditure.

Devoteam orchestrated a seamless transition, creating a detailed migration plan, transferring diverse data sources, and customising the platform to fit Nordnet's exact needs.

Consequently, Nordnet streamlined threat detection, improved log coverage, and reduced overall security risks. This change enhanced data privacy and delivered a notable decrease in the total cost of ownership.

Microsoft

What Will It Take to Turn Copilot Adoption into Real, Scalable ROI?

With Microsoft Experts
Alexandre Perazza and Tim Sente

TLDR

Biggest Surprise of 2025: The speed of Copilot enterprise deployment, and the shift from central cloud back to decentralisation.

2025 Business Shift: Competitors are getting creative by insourcing nearshore staff to compete on price, and the market is moving to outcome-priced services.

2025 Critical Lesson: AI adoption is a change management challenge, not a tech one.

Overhyped Technology in 2025: The narrative about one-click AI solutions that solve everything; real value requires planning and good data.

Customer Conversation Shift in 2025: Moved from curiosity to demanding proven value (ROI) and asking how to govern and scale AI safely.

Legacy to Retire in 2026: The 'lift and shift' mentality and the idea that we need to invest heavily in building foundational concepts/core landing zone platforms

Biggest Challenge for 2026: Customers are frustrated by the speed of change and struggle to operationalise AI workflows across different departments to prove ROI.

Non-Negotiable Investment for 2026: Going all-in on GitHub Copilot and focusing on AI solutions that prove ROI with built-in governance.

What Will It Take to Turn Copilot Adoption into Real, Scalable ROI? With Microsoft Experts Alexandre Perazza and Tim Sente

Experts

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Alexandre Perazza is the Technical Alliance Manager for Devoteam Microsoft Business Unit. He is responsible for aligning the Devoteam portfolio and go-to-market strategies directly with Microsoft and local teams. With an extensive background in technical consulting and development, his recent focus has been successfully managing key strategic alliances with large global vendors, particularly Microsoft, across various system integrators.

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Tim Sente is the CTO for Microsoft Business Unit at Devoteam Belgium. With a focus on driving local pre-sales and accelerating growth, he directs strategy across the Infrastructure, Cloud Native Development, Workplace, and Data tribes.

Microsoft

2025: Reflections & Lessons Learned

What was your single biggest technology surprise of the last year?

Tim Sente: From a technology perspective, we now see AI pop up everywhere. Initially, AI was seen more as a tool to support people, but now we're seeing a shift where it's becoming a full integration, a platform that connects everything: unstructured data, structured data, and workplaces with AI functionalities and end-to-end agents. We also see a shift from central cloud consolidation back toward decentralisation, driven by the need for instant decisions in IoT scenarios, like autonomous cars becoming their own data centres.

Alexandre Perazza: I wouldn't call it a surprise in terms of technology, but the biggest surprise for me is the speed at which Copilots moved from concept to enterprise deployment. Once customers realised the real role-based gains Copilots could bring, especially in areas like sales support and finance, they rapidly sped up their deployment.

Which competitor's strategic move truly surprised you, and what did you learn from it?

Tim Sente: In the current economic market, competition has never been stronger than it is today; customers have higher demands and continue to challenge the prices of our services. I see competitors becoming more creative in lowering costs by actually insourcing nearshore people into the local country and having them work on nearshoring rates. This makes it impossible for us to compete on price, though we are still strong on quality. Additionally, customers are moving away from having a single dedicated partner, opting for an economical system supported by numerous partners. We have to work more and more with our competitors now.

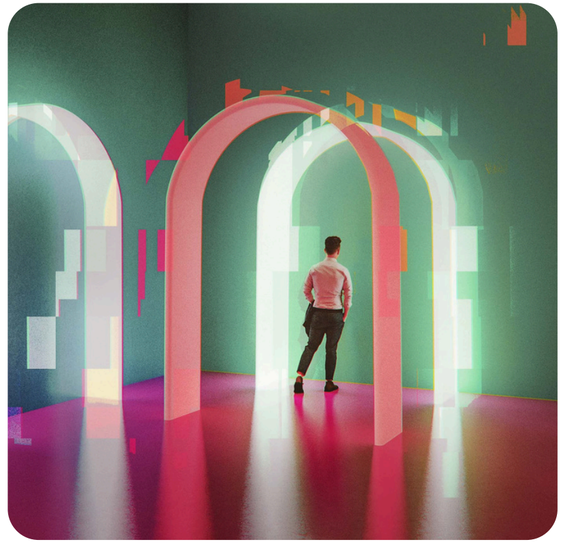
Alexandre Perazza: Competitors are shifting from traditional Time & Material projects to outcome-based services. Customers increasingly demand solutions that deliver and demonstrate ROI before payment. This trend focuses less on effort and more on tangible value, signalling the need to rethink our delivery models.

What technology or trend do you believe was the most overhyped in the last 12 months?

Tim Sente: In general, AI is a hype, it's everywhere. Many customers jumped on the trend, thinking that just buying some Copilot licenses would instantly deliver ROI, and many were disappointed. It was overhyped, but we compare it to a hockey stick, we're at the edge, and the technology is accelerating. Now we have another jump with quantum computing. The overhyped technology will become less so as it gets more practical. For instance, autonomous driving cars are now taking jobs away from taxi drivers, attacking companies like Uber, DHL, and UPS. This is becoming a reality, not just a futuristic hype.

Alexandre Perazza: What is overhyped is the narrative about one-click AI solutions that can solve everything. Template-based solutions that go from 0% to 100% in a few clicks simply don't work. Real value still comes from planning, identifying use cases, having good data sets in place, clear tasks, and integration into business systems. There's no silver bullet, and you'll likely fail.

> **The crucial lesson is that enterprise AI adoption is fundamentally a change management challenge, not a technology one.**
>
> - Alexandre Perazza



What is the single most important business lesson you learned in the last 12 months?

Tim Sente: Our biggest lesson is that while the Microsoft ecosystem is vast, the greatest value comes from focus. Clients achieve more by prioritising the few core offerings that solve their immediate needs, establishing a strong foundation before introducing additional complexity.

Alexandre Perazza: For me, the crucial lesson is that enterprise AI adoption is fundamentally a change management challenge, not a technology one. It's all about the ability of enterprises to adopt new models and disrupt their existing ones, which is a human behaviour issue. You need to teach them how to learn from it, fail with it, and scale from it.

2026: Future Focus & Strategy

What is the single most critical tech change happening within your core area right now, and why is it a game-changer for our customers?

Tim Sente: It's definitely Copilot with the ability to use agents, or combine them with external or internal agents, to automate processes or tasks. The technology evolves constantly. The next phase of Copilot will enable actions like saving a document or generating a PDF. Today, Copilot can generate office and PDF documents, which it previously couldn't do, making it more interesting and efficient. It's all about increasing your efficiency; a 20-minute task becomes a few minutes. Additionally, as Copilot becomes increasingly free, customers can already experiment with its functionality, which will trigger interest and lead to customers asking us to build something for them, rather than us always having to present everything first.

Alexandre Perazza: I see Microsoft investing a lot in the unification of data, AI, and security/governance across solutions like Microsoft Fabric. This is a game-changer for customers because it enables them to move from silo approaches to real-time intelligence and insights, giving them the essential data foundation for AI projects.

What is your 12-month non-negotiable technology investment priority, and what is the biggest business risk if we don't execute it?

Tim Sente: Our non-negotiable priority as a partner is to focus fully on GitHub using GitHub Copilot. It's no longer possible to be successful without GitHub, as it has become a standard tool like Microsoft Office, with numerous integrations to various technologies. Cloud-native developers and engineers need an end-to-end integration with tools like GitHub Copilot.

Microsoft

If we don't go all-in on GitHub, we will be unable to support our customers effectively.

Alexandre Perazza: From a customer perspective, non-negotiable priorities are AI solutions that prove ROI and scaling solutions based on AI that take governance and security into consideration by default. If they don't execute on this, customers won't scale responsibly, and they risk losing trust.

> **Initially, AI was seen more as a tool to support people, but now we're seeing a shift where it's becoming a full integration, a platform that connects everything.**
>
> - Tim Sente

What is the one legacy system or way of thinking we must completely retire in the next two years to remain a market leader?

Tim Sente: We need to retire the idea that we need to invest heavily in building foundational concepts/core landing zone platforms. Hyperscalers are getting tired of customers not investing in a good foundation, so they are now offering clients the ability to deploy these foundational setups (landing zones) with a click of a button, providing infrastructure as code. This was historically our know-how as partners, but it will become obsolete as the hyperscalers maintain it. We should focus on being on top, giving specialized advice or putting additional services on top of that.

Alexandre Perazza: We, as system integrators, must retire the 'lift and shift' mentality. For too long, we approached customers saying, "Hey, let's move to the cloud and scale from there," not just for infrastructure but even for AI. Customers are questioning this status quo and demanding cloud-native and AI-first architectures as the baseline for any conversation.

How has the rise of AI fundamentally changed the conversation you have with customers today compared to one year ago? What is the next major topic for customer conversations in the coming year?

Tim Sente: Customers are still very interested in AI, but they are focused on ROI. Most are still unaware of what it can do for their organisation. We need to focus on finding and sharing business cases of similar organisations (like the manufacturing plant case) to help them identify internal use cases. The conversation has shifted from us explaining the possibilities to customers already knowing what they want and asking us to build it.

Alexandre Perazza: A year ago, customers were just curious about what AI could do. Now they know, and the hype has diminished. They now come to us and ask two main questions: how to prove value and how to govern it and scale it safely? The next conversation will be less about being integrators and more about being a true customer advisory business, focusing on the real impact of AI and how to secure and govern solutions to unlock innovation.

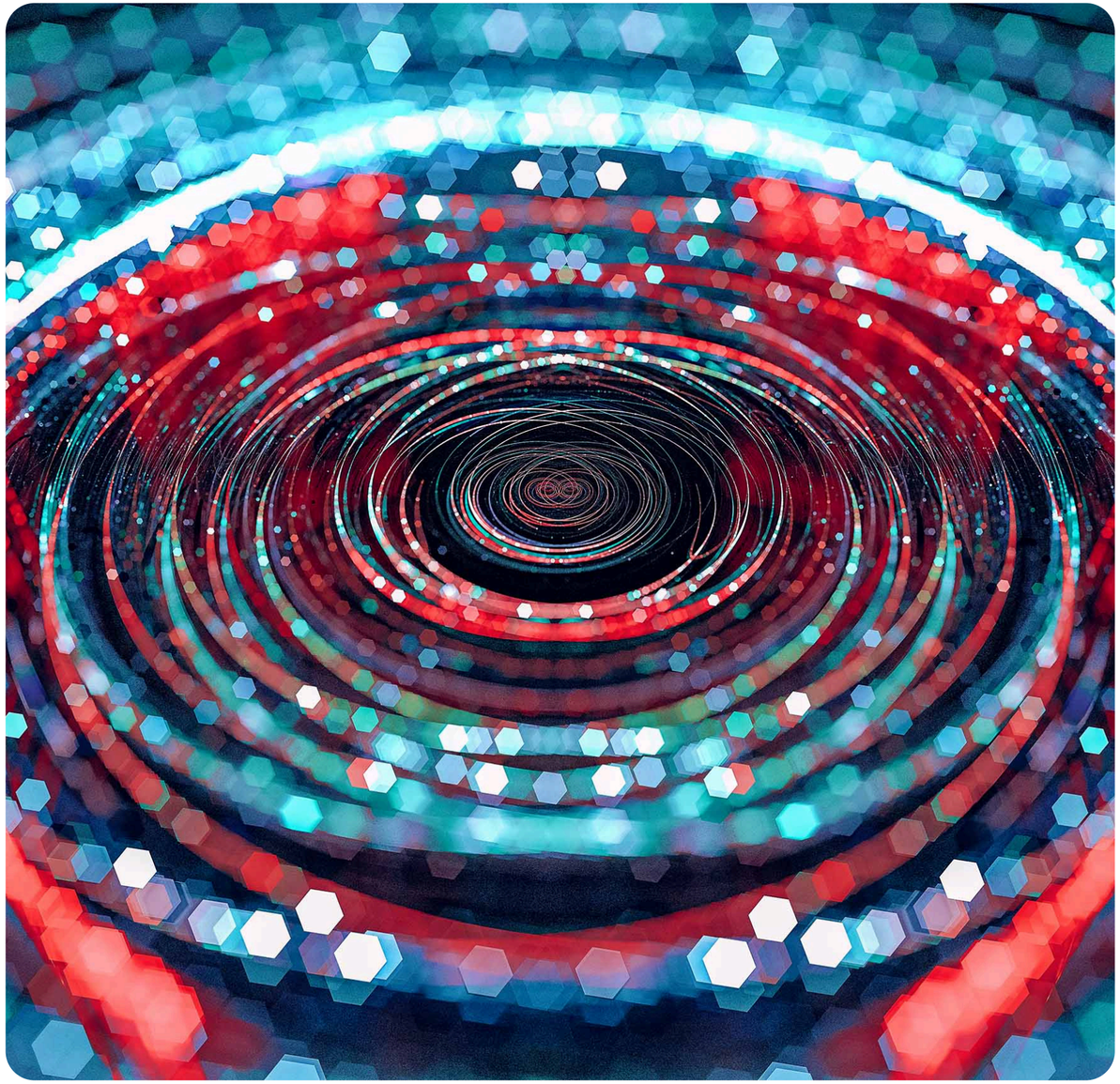
What is the biggest challenge for our customers today, and what is the one consistent frustration you hear that we are still not solving effectively with technology?

Alexandre Perazza: Customers are consistently frustrated by the speed of things; it's hard for them to keep up with the conversation, and something is old as soon as they test it. More importantly, they are struggling to operationalise AI workflows by connecting different departments (HR, supply chain, IT, marketing) and realising the value of interconnected AI. They also struggle with too many disconnected tools and need to get organised again to prove ROI.

What sets your technology or solution set apart from our competitors in the market today?

Tim Sente: Microsoft is getting ahead of other hyperscalers due to the very good cooperation and integration with OpenAI and its models. Microsoft is excellent at doing a full integration across all its products, AI is embedded, using Copilot within MS Office applications, making its way into data platforms, aka Fabric and Databricks, its SIEM solution 'Sentinel' using Copilot Security and many more. Agent 365, Foundry IQ, and Fabriq IQ are the glue that governs and controls everything in one place. We are seeing trends where customers are using Microsoft technology (Active Directory, Office), but multiple hyperscalers are now moving their focus back to Microsoft because the semantic models and OpenAI integration are much stronger.

Alexandre Perazza: Microsoft's strongest trait since the beginning is its ability for integration, integrating the whole stack of enterprise solutions, ranging from Azure, Microsoft 365, Dynamics, and beyond. Everything is connected and unified. The competitive advantage is centered on this integration, a secure-by-design approach, and governance by design. Also, their solutions and tools are familiar to most enterprises.



Top 4 Technology Highlights

Microsoft

Microsoft Fabric

A unified data lakehouse, real-time analytics, semantic models, and all things data under one governance place. It's the cornerstone of any AI strategy development. Without properly organised, secure, and governed data, AI solutions and Copilot/agentic workflow development cannot succeed. Start small and grow. Pilot something small and high-value, but not too difficult, to generate value quickly and learn from failure.

Security Copilot

An AI-powered threat detection and response system. It is a game-changer for security teams, helping enterprises defend against fast, advanced cyber threats at the speed and scale of AI. To start adopting it, integrate it with existing Microsoft security solutions and partner extensions, pilot successful use cases, and scale from there.

Agent 365 / Foundry IQ / Fabric IQ

A strategic layer atop the Microsoft platform. This stack provides a centralised "helicopter view" and control over all AI components and agents (with Foundry IQ integrating AI engines into Fabric). It facilitates cooperation between departments to ensure the availability of structured data. This technology drives organisational convergence, replacing isolated teams with one unified unit.

Github Copilot

An essential AI agent that revolutionises development speed by efficiently refactoring legacy applications and converting code for modern platforms, such as containers. Tasks that once required months can now be completed in weeks. For every cloud-native developer, this tool is becoming a standard, non-negotiable requirement for end-to-end integration. Full adoption of GitHub as the foundational development tool is necessary.

Use Case: Empowering the factory of the future with a modern data platform

DYMO, a globally recognised manufacturer of label solutions, faced operational inefficiency due to a highly automated production process still burdened by paper documentation. The challenge was poor data accuracy and availability, with employees spending excessive time on administrative tasks. The goal was a complete digital transformation to achieve data-driven decision-making, preparing for the "Factory of the Future" concept.

DYMO partnered with Devoteam to implement a multi-year digital programme, using Microsoft 365 and the Ometa low-code framework to digitise information flows and create real-time shop floor portals. This solution leveraged Microsoft Azure and Power BI for actionable insights.

As a result, administrative time for key jobs reduced by up to 93%, the production flow became fully automated, and DYMO received the prestigious 'Factory of the Future 2025' award.

Use Case: Ardian cuts cash flow modelling time using Microsoft Data & AI solutions.

Ardian, a premier global private investment firm, began exploring cloud-based data solutions to enhance strategic decision-making and inter-departmental collaboration.

The challenge was designing and implementing a new cloud data infrastructure on Microsoft Azure, specifically focusing on Synapse. Ardian needed to develop sophisticated platforms for critical functions, including carbon emissions analysis and cash flow forecasting. Devoteam, leveraging its Azure and data expertise, partnered with Ardian to industrialise two key projects: the Air Carbon data platform and the strategic Foresight cash flow modelling tool.

This collaboration led to a drastic reduction in cash flow simulation calculation time, dropping from hours to mere minutes or seconds. Ardian now monitors approximately fifty funds in the application, significantly improving operational efficiency and synergy between departments.

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If 95% of AI Implementations Fail, Are We Focusing On The Wrong Problems?

With ServiceNow Experts
Jean-Marc Chevereau and
Anne Granet

TLDR

Biggest Surprise of 2025: The speed of GenAI and the shift to Agentic AI. The fact that 95% of GenAI projects fail to achieve ROI.

2025 Business Shift: Reducing vendor count to focus on core areas like data quality and workflows.

2025 Critical Lesson: Agility is essential; the entire business model can change in less than 12 months. We need to challenge all established operating models

Overhyped Technology in 2025: The "digital assistant" dream and the necessity of rebranding everything with "GenAI version.

Customer Conversation Shift in 2025: Moving from "Maybe we'll do a PoC" to "How do I implement this and what's the real impact?"

Legacy to Retire in 2026: Thinking in silos. Be prepared to decommission up to 50% of existing systems.

Biggest Challenge for 2026: The lack of tangible proof and concrete ROI.

Non-Negotiable Investment for 2026: A unified C-level vision for AI technology. Investing in services to address change management and the operating model around ServiceNow.

If 95% of AI Implementations Fail, Are We Focusing On The Wrong Problems? With ServiceNow Experts Jean-Marc Chevereau and Anne Granet

Experts

Jean-Marc Chevereau
ServiceNow Practice Managing Director at Devoteam
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Jean-Marc has been leading the ServiceNow business unit at Devoteam for over 15 years. With 25 years of experience in IT consulting, he was initially drawn to ServiceNow as it represented the "revolution of the cloud" and was the first major Software-as-a-Service (SaaS) solution for ITSM.

Anne Granet
ServiceNow CTO at Devoteam
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Anne first encountered ServiceNow 12 years ago as a client responsible for implementing the platform. While it was initially an ITSM project, she quickly saw its potential for broader applications in HR, finance, and beyond. This realisation led her to join Devoteam, where she serves as the CTO of the ServiceNow business unit.

2025: Reflections & Lessons Learned

What was your single biggest technology surprise of the last year?

Anne Granet: The sheer speed of Generative AI adoption. We didn't even have time to fully understand GenAI before the market shifted to Agentic AI. The acceleration in the last six months was more than we've seen in the last three years.

Jean-Marc Chevereau: I agree on the speed. But my biggest surprise was a market analysis showing that 95% of GenAI implementations failed to succeed or achieve their expected ROI. This highlights the massive challenge we all face in implementing this technology with real, concrete use cases and measurable benefits at an enterprise scale.

> **We didn't even have time to fully understand GenAI before the market shifted to Agentic AI.**
>
> - Anne Granet

Which competitor's strategic move truly surprised you, and what did you learn from it?

Anne Granet: I'm not sure I have seen a true business model shift yet, precisely because clients are still figuring it out. Technology is moving so fast that businesses' main question is, "What am I going to do with this?" They know it will impact their business and operating model, but they are unsure of how to get there. They need more help with understanding the impact than with the technology itself.

Jean-Marc Chevereau: I saw a radical move from a top leader in the high-tech manufacturing industry. They decided to reduce their number of IT vendors to only five key players, including ServiceNow. It was a radical move; they are transforming their entire organisation to focus on two key areas: data (quality and ownership) and workflows. It's a visionary move, as there's no time to see if others had any return of investment from a similar move.

What technology or trend do you believe was the most overhyped in the last 12 months?

Anne Granet: The "digital assistant." Every vendor was selling the dream that you'd have a little assistant waiting for you at work, which is simply not true - at least not yet. While this hype was happening, the real, rapid progress was being made in the background with Agentic AI. When you want to deploy it, you realise it's about the "boring" but essential steps: getting your architecture, security, and data ready, and managing the organisational change. That's less exciting than buying a new tool.

Jean-Marc Chevereau: Generative AI was overhyped to the point that vendors didn't have a choice. To stay relevant, you had to rebrand everything with a "GenAI version," with the risk of making other valuable innovations invisible. The consequence is that many customers purchased licenses, but now those licenses are sitting on the shelf, unused.

> **2025 was an opportunity to rethink all the operating models we've held for years. Now, clients realise they must challenge everything, including established structures like the onshore/offshore operating model.**
>
> - Jean-Marc Chevereau

What is the single most important business lesson you learned in the last 12 months?

Anne Granet: Agility. The lesson is that your entire business can change in less than 12 months. We have to find the agility to change how we deliver projects, reskill our teams at a faster pace than ever, and rethink what we sell and how we sell it. The questions clients ask us today are completely different from what they asked a year ago. They want to know how they can connect ServiceNow to what they already have, how different technologies will work together, and how it will fit within their operating model.

Jean-Marc Chevereau: 2025 was an opportunity to rethink all business operating models we've held for years. Now, clients realise they must challenge everything, including established structures like the onshore/offshore operating model. Another lesson was the realisation that there are two worlds when it comes to AI and ServiceNow. There are companies that want Agentic AI now, but there are also those who are reluctant and want to wait. In mid-2025, 60% of our European customers were still using the ServiceNow version without AI. And some of them renewed it for the next three years without AI. This is a huge maturity gap, and we have to address it.

2026: Future Focus & Strategy

What is the single most critical tech change happening within your core area right now, and why is it a game-changer for our customers?

Anne Granet: I see it as three pillars we must build on. First, the AI assistants that analyse and create content. Second, achieving data accuracy and governance to make that assistant effective. And third, implementing Agentic and robotic workflows to actually automate the tasks. If you have those three, you can change your operating model and find your ROI.

Jean-Marc Chevereau: The most critical tech change is ServiceNow. For a company to cross the $10 billion revenue threshold and still be growing at 23-24% is unique in the history of tech. It's a game-changer due to its unique Platform-as-a-Service (PaaS) approach that breaks down corporate silos. It transforms an organisation from vertical processes to horizontal ones.

What is your 12-month non-negotiable technology investment priority, and what is the biggest business risk if we don't execute it?

Anne Granet: The priority is the services around ServiceNow. The biggest risk is that organisations move forward with AI but fail to address change management and the operating model. If you attempt to build AI around your existing, broken processes, you won't succeed. You won't find the ROI, and will end up in the 95% of failed AI projects.

Jean-Marc Chevereau: The priority must be a unified vision of AI technology at the C-level. This can no longer be managed by one silo - not even the IT department. Companies need to invest in a single, company-wide roadmap for a technology that breaks all existing frontiers.

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> **The most critical tech change is ServiceNow. For a company to cross the $10 billion revenue threshold and still be growing at 23-24% is unique in the history of tech.**
>
> - Jean-Marc Chevereau

What is the one legacy system or way of thinking we must completely retire in the next two years to remain a market leader?

Anne Granet: We need to retire thinking in silos. It's not a new idea, but it's truer than ever. Everyone wants to be a king in their own kingdom, but you can't build a unified experience that way.

Jean-Marc Chevereau: I wouldn't name a specific tool, but it's time to accept that a big part of existing systems can be decommissioned in the very near future, and that includes some quite new systems. Agentic AI and a true PaaS reshape the way we think about IT, and half the old map will disappear.

How has the rise of AI fundamentally changed the conversation you have with customers today compared to one year ago? What is the next major topic for customer conversations in the coming year?

Anne Granet: A year ago, it was, "Maybe we'll do a PoC." Now, it's, "Okay, I'm building my budget for 2026. How do I implement this? What's the real impact?" We've moved from the hype to the "boring stuff" of actual implementation. The next major topic for the coming year will be the impact of AI and GenAI on managed services, especially offshore and nearshore models.

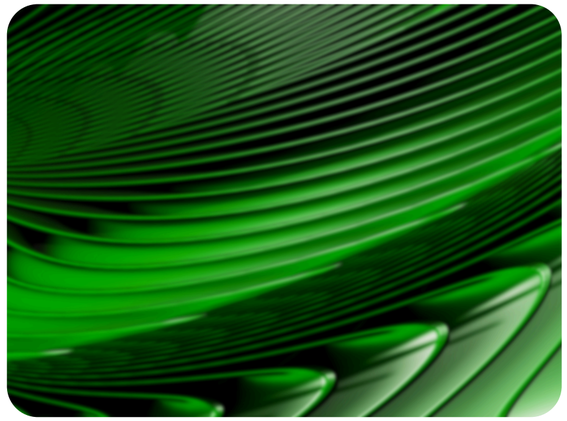
Jean-Marc Chevereau: We are also starting to discuss "lessons learned." We can't just talk about what AI can do on paper anymore; we have to bring our own ROIs. We also need a different language for the part of our customer base who are still on a ServiceNow version without AI.

> **We've moved from the hype to the "boring stuff" of actual implementation.**
>
> - Anne Granet

What is the biggest challenge for our customers today, and what is the one consistent frustration you hear that we are still not solving effectively with technology?

Jean-Marc Chevereau: The lack of concrete return of experience. We are entering the "back to reality" phase. This creates a lot of frustration and difficult discussions about why things didn't succeed, and why others did.

Anne Granet: Definitely. There was so much hype, which created massive expectations. But so far, there is no tangible proof for many clients. The C-level executives themselves are still on a learning curve, trying to understand how this applies to their businesses. We are in a moment where everyone knows AI is here to stay, but they don't know what to do with it. That creates significant friction and frustration for all parties.



What sets ServiceNow technology or solution set apart from our competitors in the market today?

Jean-Marc Chevereau: What sets ServiceNow apart is the platform approach. It is unique as a PaaS because it has one data model and one platform architecture. This is what allows for "open book" collaboration and end-to-end services between HR, marketing, finance, and IT in a way that is truly unique.

Anne Granet: For ServiceNow, it's also their capability to invest heavily in R&D. They move very, very fast. Over the last 12 months, ServiceNow has put a significant amount of work into integrating GenAI and Agentic AI capabilities directly into the platform.

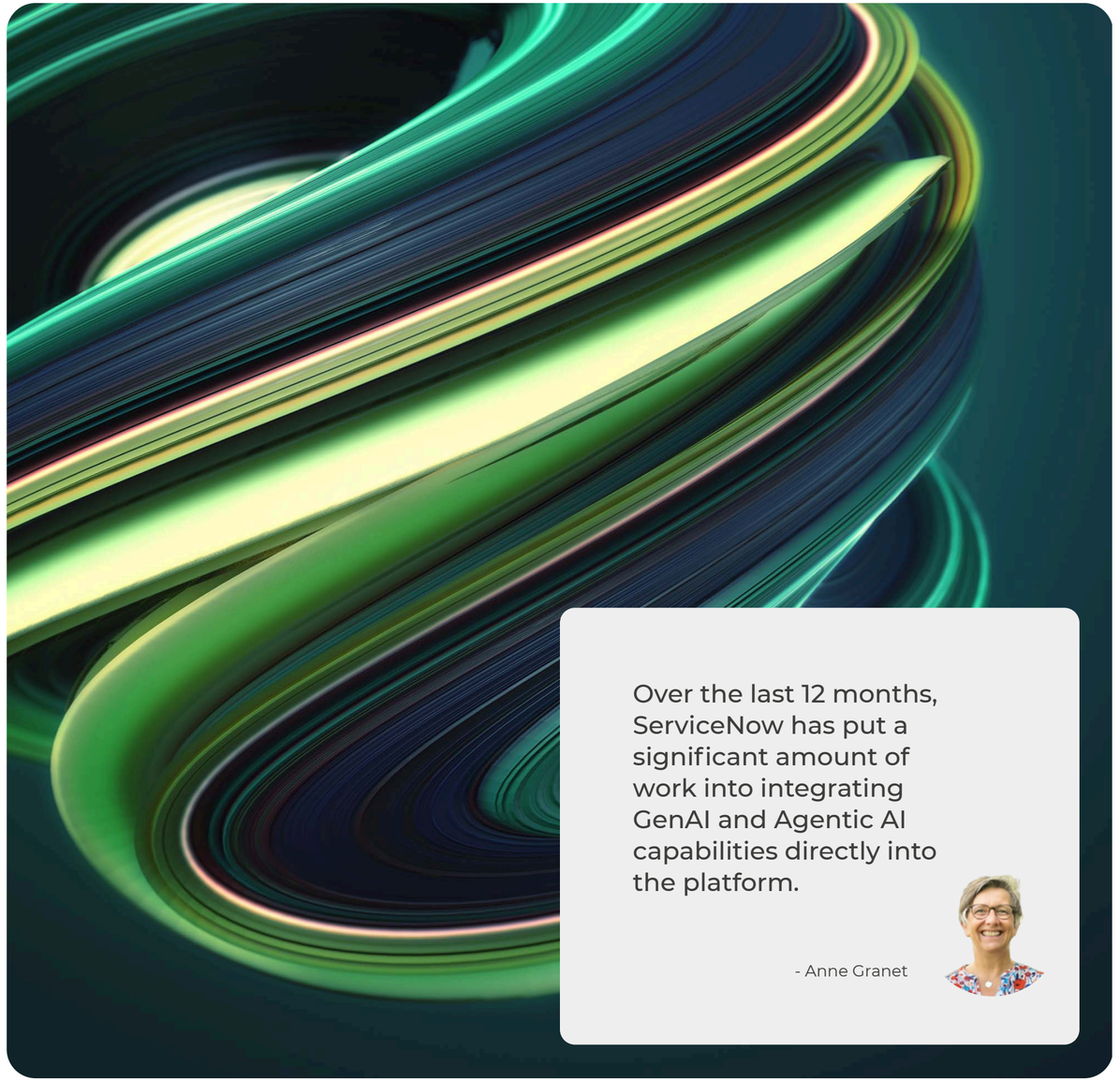
> **It's time to accept that probably 50% of existing systems can be decommissioned in the very near future - and that includes some quite new systems.**
>
> - Jean-Marc Chevereau

Top 3 Technology Highlights

ServiceNow's partnership with Nvidia
ServiceNow has been collaborating with Nvidia for some time, and this partnership is expected to bring significant results in 2026. The two companies are working on assistant technology, aiming to scale trusted AI across industries and uniting intelligent workflows with open models.

AI Ops and Platform Observability
ServiceNow is focusing heavily on "self-observability." With that enhancement, customers will be able to develop an AI agent that will mitigate issues in the system. The ability to automatically mitigate and remediate incidents on the platform will be a significant step for customers in the upcoming year.

The Impact of Observability on Managed Services
This highlight is connected to the observability. Customers using intelligent observability coupled with agentic AI for issue identification and remediation, may no longer need many traditional managed services. That will be a massive change for customers in 2026.



Use Case: Standardises Global IT Using ServiceNow to Cut Vulnerability Incidents to Zero

Asahi Europe and International (part of the Japanese Asahi Group) is a brewing company, producing 4.4 billion litres of beer every year. In Europe, they employ more than 15,000 people across 18 production facilities.

Facing a complex mix of inherited IT systems and security challenges following a 2016 merger, the customer adopted the ServiceNow platform. The goal was to standardise technology and unify European operations, and to improve its enterprise-wide security capabilities.

Devoteam deployed ServiceNow Security Operations with Vulnerability Response for Asahi, automating risk prioritisation and remediation. This **resulted in zero vulnerability-related incidents and a 59% reduction in the mean time to recovery**. The company also leveraged ServiceNow IT Operations Management for better monitoring and is using the platform's features, like a self-service IT portal and chatbot. This **improved efficiency and boosted user satisfaction to 89%**.

Use Case: St Maclou digitalises installation service with ServiceNow CSM & FSM

St Maclou, a leading home improvements retailer, wanted to digitise and reinvent its operations, aiming to streamline logistics and customer processes in the face of market transformation.

With support from ServiceNow partner, Devoteam, St Maclou is piloting ServiceNow Field Service Management (FSM) at eight of its stores in southern France. The Posy app introduces a new approach to coordinating the work of installers, eliminating paper-based procedures. Installers are now grouped by region, their location and availability updated in real-time and viewable by sales and operations teams online.

This transformation has simplified work for installers, is expected to **cut travel by one million kilometres annually**, and **increase productivity and invoicing speed by 10%**. It also strengthens profitability, **increasing the number of jobs managed in-house by 30%**.

ATLASSIAN

Why Is Digital Transformation 90% Psychology and 10% Technology?

With Atlassian Experts
Gert Jan van Halem and
Erika Duarte

TLDR

Biggest Surprise of 2025: Human input and connection are the real growth drivers.

2025 Business Shift: The move from selling software licences to selling results.

2025 Critical Lesson: You cannot automate culture. Digital transformation is 10% tech and 90% psychology. We need to focus on solving actual problems.

Overhyped Technology in 2025: GenAI itself, due to organisations simply adding it on top of existing broken processes without solving core problems.

Customer Conversation Shift in 2025: Matured from "How do I use AI?" to "Can I really trust it?" and "What's the actual value?"

Legacy to Retire in 2026: The belief that technology belongs exclusively to IT and the siloed approach to business..

Biggest Challenge for 2026: Connecting strategy, operations, people, and AI.

Non-Negotiable Investment for 2026: Human-centred data governance and training to bring teams on board with AI.

Why Is Digital Transformation 90% Psychology and 10% Technology? With Atlassian Experts Gert Jan van Halem and Erika Duarte

Experts

Gert Jan van Halem
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Group CTO of Devoteam. With nearly 15 years of experience as an Atlassian consultant, he brings a deep technical perspective. A proud owner of an Atlassian "dragon slayer" t-shirt, earned by solving complex product challenges.

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Erika is the Chairman of the Atlassian EMEA board at Devoteam and CEO of Inlogiq (part of Devoteam). With 18 years of experience in the Atlassian world and a background in finance, Erika describes herself as a translator between the business and tech worlds.

ATLASSIAN

2025: Reflections & Lessons Learned

What was your single biggest technology surprise of the last year?

Erika Duarte: Honestly, the real surprise was how crucial the human aspect turned out to be. The companies that grew the most weren't just the ones with the shiniest tools, but the ones where people actually talk to each other, share knowledge, and trust the process. Atlassian is addressing this by focusing on removing the headaches of teams that use the tools, rather than fixating on dashboards and workflows.

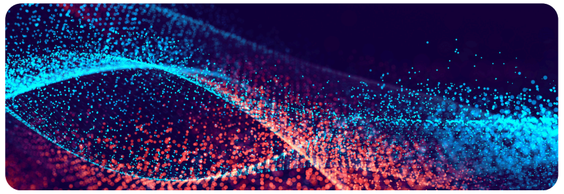
Gert Jan van Halem: I agree. Of course, everybody is doing AI, so that's not a surprise. The big surprise is the realisation that you really need a human touch to implement it correctly. Technology is not enough; you need human input to get it done right.

> **You cannot automate culture. No matter how many bots or dashboards you have, if people don't understand *why* they are changing, they will find creative ways to ignore your perfect system.**
>
> - Erika Duarte

Which competitor's strategic move truly surprised you, and what did you learn from it?

Erika Duarte: It was the shift within Atlassian itself: moving away from selling software licenses towards selling results. We're selling things like efficiency, engagement, and even happiness. It's about helping humans work smarter and feel better. We call it having fewer headaches.

Gert Jan van Halem: Exactly. I see a shift in approach. Instead of just giving you a hammer, we want to help you build the house. This is a true differentiator from companies that just sell the tool.



What technology or trend do you believe was the most overhyped in the last 12 months?

Gert Jan van Halem: Easy, GenAI. The issue isn't the technology itself. The problem is that many people simply add some GenAI on top of everything they have, and that doesn't solve the real problems. And GenAI can solve many problems, but only when implemented correctly. That's why it is so crucial for Atlassian, and us as partners, not just to sell the tool, but also to prevent the team's headaches that Erika mentioned earlier.

Erika Duarte: I agree, Generative AI has amazing potential, but it was overhyped. We learned that AI adds real value when it works *with* people, not *in place* of them. It should help us *be better*, not just *do things faster*.

> **Many organisations simply add some GenAI on top of everything they have, and that doesn't solve the real problems.**
>
> - Gert Jan van Halem

What is the single most important business lesson you learned in the last 12 months?

Erika Duarte: You cannot automate culture. No matter how many bots or dashboards you have, if people don't understand why they are changing, they will find creative ways to ignore your perfect system. Digital transformation is 10% tech and 90% psychology.

Gert Jan van Halem: That's it. It's the human touch that makes the difference.

2026: Future Focus & Strategy

What is the single most critical tech change happening within your core area right now, and why is it a game-changer for our customers?

Gert Jan van Halem: I would say AI agents. There's a risk it will be overhyped like GenAI was, but the change is real. To bring it back to Atlassian, what they are doing with Rovo is building a platform to connect all your data sources and use AI to make sense of it. This is a game-changer because it's about breaking the silos. We're moving beyond just putting a simple chatbot on top of things. We're now laying the foundations so the chatbot can make sense of the data and processes. This is where the real value is.

Erika Duarte: The real game-changer for the customers is how Atlassian is focusing on the human aspect. It's all about helping teams find that sweet spot where productivity meets well-being. If your tool doesn't make people's lives easier and their work clearer, it's time to rethink your setup.

What is your 12-month non-negotiable technology investment priority, and what is the biggest business risk if we don't execute it?

Erika Duarte: Human-centred data governance. We must make sure data serves people, not the other way around. If we use data to empower teams, that's great. But if we just use it to micromanage, we've just created a digital version of “1984”. The risk is that we forget what data is actually for: better decisions, not bigger reports.

Gert Jan van Halem: I'll add people enablement. We must invest in training and getting people on board with AI. This is going to be crucial next year. The biggest risk is leaving your people behind.

ATLASSIAN

> **The biggest risk is leaving your people behind.**
>
> - Gert Jan van Halem

What is the one legacy system or way of thinking we must completely retire in the next two years to remain a market leader?

Erika Duarte: I have two ideas to retire. First, the belief that technology belongs exclusively to IT. It doesn’t. Technology is for business, it's cultural, it's strategic, and honestly, it's often more emotional than technical. Second, we must retire the notion that meetings are collaboration. They are not. Leaders need to let go of control and trust their teams. Control doesn't scale, but trust does.

Gert Jan van Halem: I don't believe we should retire legacy systems, per se. AI actually makes it more interesting to open them up instead of replacing them. What we must retire is the siloed approach. You have to look at your whole business and take a holistic approach in order to see where your value is and how you want to serve your customer.

How has the rise of AI fundamentally changed the conversation you have with customers today compared to one year ago? What is the next major topic for customer conversations in the coming year?

Gert Jan van Halem: The conversations have matured. Last year, everybody thought, "AI will change the world, and it's the answer to everything." Now, the questions are more real: "Can I really trust it?" and "What's the actual value I get out of it?" Customers are asking about business returns and whether the results they are getting from AI are grounded in the right data. Next big topic? I predict that in 2026, everyone will be talking about "agentic" without knowing exactly what it means, just like we had with GenAI. Our job will be to help customers reduce the noise and find the real value.

Erika Duarte: Last year, everyone asked, "How do I use AI?" This year, it's more "How do I stop AI from using me?" The next major topic will be, "How do I *govern* my AI?" Companies will have multiple bots and agents, such as Rovo, Microsoft Copilot, and Gemini, and they will need to orchestrate all of them.

What is the biggest challenge for our customers today, and what is the one consistent frustration you hear that we are still not solving effectively with technology?

Erika Duarte: The biggest challenge is the same as last year: connecting strategy, operations, people, and AI. This information is scattered across different parts of the organisation. Decision-makers are somewhere in the middle. We need to build the bridge between them. It's a digital transformation with a human translator.

Gert Jan van Halem: Atlassian has consistently excelled at streamlining development and business processes. The new challenge is figuring out how an agent fits into that process as a new kind of team member. How do you build confidence in that? Atlassian's strategy is well-aligned to help companies remain in control and ensure everyone is working toward the same goal.

> **Last year, everyone asked, "How do I use AI?" This year, it's more "How do I stop AI from using me?" The next major topic will be, "How do I govern my AI?"**
>
> - Erika Duarte

What sets your technology or solution set apart from our competitors in the market today?

Erika Duarte: The real difference is that we don't just implement software; we implement sanity. We have a human and consultative approach to make change stick. We like to think of ourselves as the human side of tech, where empathy meets efficiency. Technology alone is not the solution; you have to integrate culture and process.

Gert Jan van Halem: When it comes to Atlassian, I don't really think much about competitors. We are more about connecting all these different tools. We are not focusing as much on competing, but rather on making sure the customer's process works in the right way. Bring on the other tools; we can connect them. Let's make love, not war.

Top 4 Technology Highlights

Rovo
A unified platform to host, govern, secure, and deploy all of a company's custom AI agents. It simplifies a very confusing landscape (currently four different Gemini apps). One single place makes it usable and scalable for the enterprise. The first step is to focus all our AI go-to-market and delivery efforts on this single, unified product.

Focus
It's an easy way to connect the company's strategy with its operations. I recommend this technology for any company wanting to align high-level business goals and the actual work being done by teams. However, adopting Focus is a bigger strategic initiative, so you need to be ready for a process transformation.

Jira Product Discovery (JPD)
It was originally designed for creating products, but it's a very flexible tool for making decisions on any initiative or investment. It helps you evaluate many ideas based on parameters such as impact and price, keeping the messy brainstorming phase separate from the structured development process. It provides a consolidated, data-driven way to make fast decisions. Similarly to Focus, this is a more strategic adoption.

DX (a recent acquisition)
This is a developer intelligence platform that uses AI to find bottlenecks, frictions and slowdowns. DX helps teams to ensure resources are focused on what drives impact. It's easy to adopt. You can just connect what you already use, like GitHub and Jira, and get a lot of insights about developer productivity right away.

Adopting new Atlassian technology?

The key for all of these is to start small and grow fast, but also to start with the end in mind. If you just do it because you want a bit of AI, it will probably fail. If you do it because you believe you can change the business and its processes, it will work.

- Gert Jan van Halem

Use Case: Unifying Jira, Confluence, and SAP for True Strategic Visibility in Financial Sector

Devoteam worked with a large bank that thought its biggest problem was process bottlenecks. It turned out to be a communication problem. The board and decision-makers could not see the real situation of major projects, harming the decision-making.

Our experts connected Jira, Confluence, ServiceNow, SAP, and other tools to construct high-level strategy lines. For the first time, the board could see the actual situation of projects, budgets, and timelines in relation to organisational goals.

The result? **Decision times dropped by 40%**, and most importantly, people finally began to trust the data. The solution transformed scattered, untrustworthy data into a reliable single source of truth for strategic oversight.

Use Case: Integrating Real-Time Plant Data to Fix Inefficient Incident Resolution

For an industrial company with €500 million in revenue, Devoteam integrated Jira Service Management with real-time data.

The client's challenge was inefficient incident resolution within their plant operations, stemming from a siloed communication and reporting structure between the physical plant workers and the management teams. By linking Jira Service Management to real-time plant data, they were able to bridge this gap.

As a result, **incident resolution times fell by 37%**. The team stopped firefighting and remembered why they liked their jobs in the first place.

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Is Data Governance the Non-Negotiable Investment That Finally Turns AI Pilots into Business Value?

With Databricks Experts
Marco Blanca and Jasper Hooft

TLDR

Biggest Surprise of 2025: Rapid adoption of Serverless Compute and Databricks' unexpected pivot to OLTP/low-latency solutions.

2025 Business Shift: Democratisation of the platform via AI tools.

2025 Critical Lesson: Security and Governance are crucial. You cannot innovate on shaky data. Sovereignty also demands platform agility.

Overhyped Technology in 2025: GenAI expectations and the belief that AI would miraculously fix dirty data.

Customer Conversation Shift in 2025: Matured from "We need AI!" to "How do we govern this?" and "Show me the business case."

Legacy to Retire in 2026: The "Gatekeeper" mindset and focusing on technology and not the use case.

Biggest Challenge for 2026: Stopping "Pilot Hell", integrating the vast number of existing AI pilots into production to avoid investment waste.

Non-Negotiable Investment for 2026: Stopping the "innovation theatre". Investing in governing AI assets with tools like Unity Catalog and MLflow.

Is Data Governance the Non-Negotiable Investment That Finally Turns AI Pilots into Business Value? With Databricks Experts Marco Blanca and Jasper Hooft

Experts

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Marco Blanca is a Principal Data Consultant at Devoteam. With over a decade of experience in the data landscape, spanning from the early days of Hadoop to the modern Lakehouse, Marco specialises in helping enterprises navigate complex cloud data migrations and governance challenges.

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Jasper Hooft is a Lead Data & AI Consultant with a proven track record in designing and implementing data and AI solutions on Microsoft Azure and AWS, including building RAG pipelines, genAI agents and managing Databricks environments. His expertise ensures robust and scalable data architectures.

2025: Reflections & Lessons Learned

What was your single biggest technology surprise of the last year?

Jasper Hooft: For me, the rapid adoption of Serverless Compute was the shift that stood out. Initially, the market was hesitant; companies were afraid of losing control over their infrastructure. However, the benefits, shorter startup times and the removal of infrastructure management burdens, completely outweighed those concerns. We're seeing a shift where data engineers can finally focus on business logic rather than wrestling with clusters. Databricks has invested heavily here, bringing serverless not just to SQL warehouses but to workflows and data exploration.

Marco Blanca: I was surprised by Databricks' move into OLTP (Online Transaction Processing) and low-latency solutions, with Lakebase. Coming from the "Lake" world, which is traditionally about massive, structural data buckets, this felt like the opposite of their DNA. But it filled a critical gap. Seeing them support low-latency use cases for websites and applications was a bold move I didn't expect, but one that is seeing growing public adoption.

What technology or trend do you believe was the most overhyped in the last 12 months?

Marco Blanca: It has to be the broader concept of AI, or rather, the feeling around it. It felt like the business world 'discovered' hot water in 2024, thanks to GenAI's rapid adoption, even though AI has existed for years. We saw a lot of "FOMO" (Fear of Missing Out), where clients wanted AI demos for the board before they had even finished their data projects. The expectation that you can just "do AI" without a foundation is definitely overhyped.

Jasper Hooft: I agree. Specifically, the idea that AI would automate data cleaning was overstated. There was this magical thinking that AI would fix dirty data, and we could abandon strict quality rules.

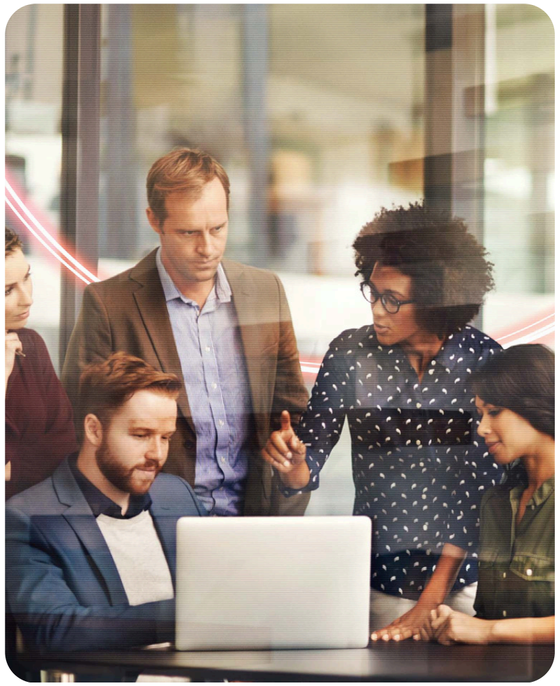
That's just not happening. The principle of "garbage in, garbage out" remains undefeated. AI can speed up quality checks, but it cannot replace governance. The expectation of a "self-cleaning" data platform was a bubble that has now burst.

> **The idea that AI would fully automate data cleaning was overstated. We still need strict quality rules because the principle of 'garbage in, garbage out' still holds true. AI speeds up the process, but it doesn't fix the data for you.**
>
> - Jasper Hooft

What is the single most important business lesson you learned in the last 12 months?

Marco Blanca: Security and Governance are back. In the rush to adopt AI, companies realised that you cannot build advanced models on shaky foundations. Governance, specifically via tools like Unity Catalog, has returned to the core of the conversation. You need your data to be secure and organised before you can innovate.

Jasper Hooft: The lesson is that Sovereignty matters. The market is demanding more control. Especially here in Europe, relying on American cloud providers brings challenges regarding data residency and security. This is why Databricks' cloud-agnostic approach is so valuable, it allows companies to maintain a unified platform across Azure, AWS, and GCP without being locked into a single infrastructure provider. Furthermore, we expect Databricks to embrace a European infrastructure provider once a viable option becomes available.



2026: Future Focus & Strategy

What is the single most critical tech change happening within your core area right now, and why is it a game-changer for our customers?

Jasper Hooft: The democratisation of the data platform. Historically, data teams have been "gatekeepers," but that is changing. Databricks is aggressively moving towards business-friendly tools like AI/BI Genie. It allows non-technical users to query data using natural language. This shifts the bottleneck away from engineering teams and empowers the business to get its own answers.

Marco Blanca: Indeed, democratisation is a key aspect here. As already mentioned, Serverless, together with capabilities like Genie and the Assistant, doesn't just help non-technical users; it frees up technical teams to focus on what truly matters: turning data into valuable information and insights.

What is your 12-month non-negotiable technology investment priority, and what is the biggest business risk if we don't execute it?

Jasper Hooft: Productionising Pilots. We are in "Pilot Hell." Companies have built endless MVPs and PoCs for AI, but 80% of them never see the light of day. The non-negotiable priority for 2025 is to stop building new MVPs and start integrating the existing ones into actual business processes. If we don't, we risk investment waste.

Marco Blanca: Exactly. The risk is that we have invested millions in "innovation theatre" while the business sees no return. My priority is also ensuring that Data Governance covers these AI assets. We need to apply the same rigour to AI models (using MLflow and Unity Catalog) that we apply to code and data pipeline.

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> **We are in "Pilot Hell." Companies have built endless MVPs and PoCs for AI, but 80% of them never see the light of day.**
>
> - Jasper Hooft

What is the one legacy system or way of thinking we must completely retire in the next two years?

Marco Blanca: Technology is not the solution; it is a means to an end. We saw this with Big Data and Data Lakes, where companies dumped data hoping it would magically fix business challenges. We saw this with the Cloud as well, where organisations hoped it would automatically provide scalability. Now, the same thing is happening with this new AI wave.

Jasper Hooft: We must retire the "Gatekeeper" mindset. Data teams often hoard data complexity, thinking they are the only ones who can understand it. That thinking is a relic. We need to document our data well enough that business users can access it themselves via AI assistants. If you are still writing SQL queries for every minor business question in 2026, you are doing it wrong.

> **We must retire the "Gatekeeper" mindset. Data teams often hoard data complexity, thinking they are the only ones who can understand it.**
>
> - Jasper Hooft

How has the rise of AI fundamentally changed the conversation you have with customers today compared to one year ago?

Marco Blanca: A year ago, the conversation was: "We need AI, quick!" Now, it is: "How do we govern this?" Clients are waking up to the reality of data lineage, security, and quality. The conversation has shifted from the shiny object to the foundation required to support it.

Jasper Hooft: It has matured from "Build me something cool" to "Show me the business case." Customers are realising that AI isn't magic. They are now asking for discovery phases to identify where AI can actually accelerate a specific workflow, rather than trying to force AI into processes where it doesn't belong.

> **A year ago, the conversation was: "We need AI, quick!" Now it is: "How do we govern this?"**
>
> - Marco Blanca

What is the biggest challenge for our customers today, and what is the one consistent frustration you hear that we are still not solving effectively with technology?

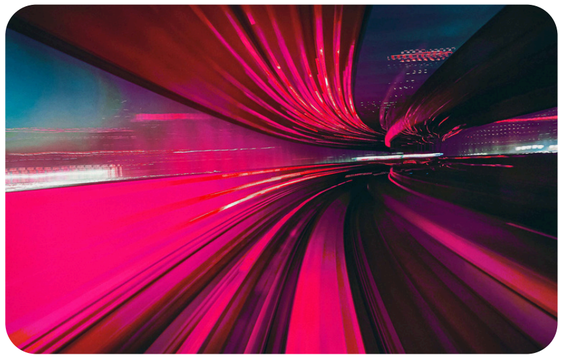
Jasper Hooft: The biggest frustration is the relentless pace of change. The AI and data landscape evolves so rapidly that a proof-of-concept built six months ago is often outdated by the time a company is ready to productionise it. This creates a paralysis where companies stick to legacy tools just to avoid the complexity of switching, which ironically slows down their growth even more. It's a vicious cycle of trying to catch up but being held back by the fear of obsolescence.

Marco Blanca: I see a similar issue, but often the root cause is a lack of Data Strategy. We definitely haven't gotten rid of legacy systems yet; they are still there, making everything slower. But the frustration I hear is often self-inflicted: customers want to "do AI" without knowing why. They start projects without a clear direction, change requirements halfway through, and end up with nothing. The technology isn't failing them; rather, it's the lack of a strategic foundation.

What makes Databricks stand out from competitors in the market today?

Jasper Hooft: It is the Unified Platform capability. Databricks allows data engineers, analysts, and ML scientists to work on the exact same data in the same environment, creating a true single source of truth. Additionally, being Cloud Agnostic is a massive differentiator. Unlike competitors tied to a specific infrastructure, Databricks runs on Azure, AWS, and Google Cloud. This flexibility is crucial for customers terrified of vendor lock-in.

Marco Blanca: I would add its heritage as a Lakehouse pioneer. Databricks is built on Spark, which gives it a distinct advantage in complex code and distributed computing over competitors who originated purely as data warehouses. While others may be stronger in traditional warehousing, Databricks leads the way in the "Lakehouse" approach, open-source integration, and heavy-lifting data engineering.



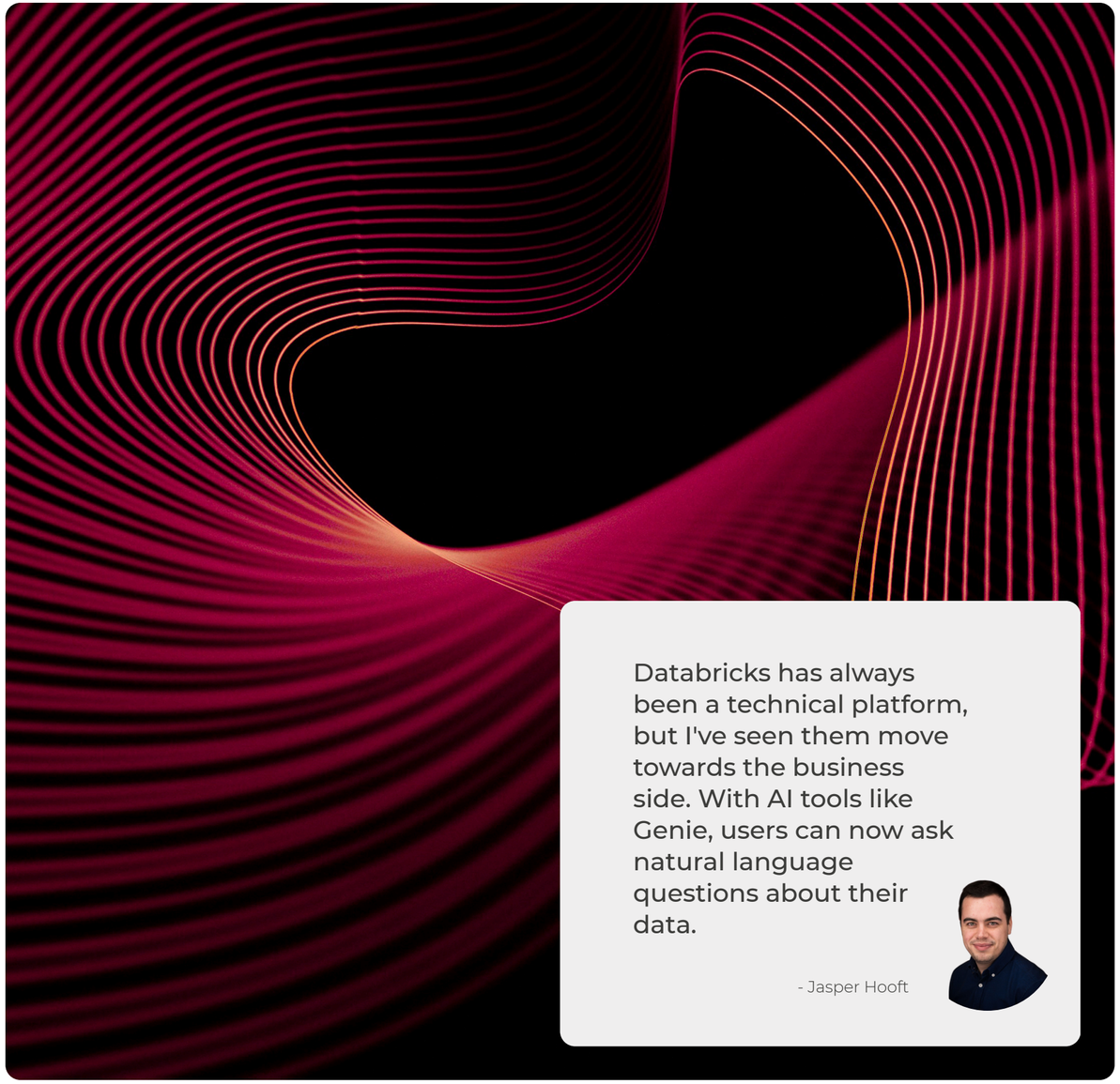
Top 3 Technology Highlights

databricks

Unity Catalog
Unity Catalog operates as the governance solution designed to unify data, analytics, and AI assets under a single umbrella. It establishes itself as the backbone of the modern data platform, directly addressing the need for centralised management. Without the lineage, security, and discovery capabilities that this catalog provides, safely scaling AI initiatives or democratising data access becomes nearly impossible. Currently, it is strengthening its status as the industry standard for Databricks users. Organisations neglecting to implement it are falling behind on modern security best practices.

MLFlow
MLflow is engineered to manage the entire machine learning lifecycle, streamlining complex processes such as experimentation, reproducibility, and deployment. It solves the "80% failure" problem that plagues many data science initiatives. By introducing DevOps discipline to the world of AI, commonly known as MLOps, MLflow ensures that models are rigorously tracked, tested, and deployed reliably. This approach prevents valuable work from languishing in a stagnant notebook, ensuring that experimental code is successfully transformed into production-ready assets.

Mosaic AI Agent Framework
The Mosaic AI Agent Framework functions as a toolkit dedicated to building and deploying production-quality AI agents. Although this technology is still emerging, it represents the next phase of automation. It facilitates a step beyond simple chatbots toward intelligent agents capable of complex reasoning and actual task execution. Regarding adoption, the approach is to start small; organisations should leverage this framework to automate internal processes, such as incident management or data retrieval, before expanding its scope to sensitive customer-facing applications.



Use Case: Global HR Services Provider Upgrades Reward Platform with AI

A global leader in professional services was experiencing efficiency and maintainability issues with their reward platform, resulting in significant manual work.

The objective was to replace it with a high-performance solution that could support international growth.

We implemented a new AI-driven reward platform on Databricks, utilising Machine Learning and GenAI to improve the user experience and automate manual processes.

This upgrade **decreased the operational workload** for teams, enabled **data democratisation**, and delivered a higher-value tool with new capabilities to customers.

Use Case: Leading Health & Beauty Retailer Transitions from Data Warehouse to Data Lakehouse

A major retail chain faced limitations with an existing Oracle-based Data Warehouse that was restricted by space (forcing the deletion of old data), slow for large queries, and unable to process data in real-time.

To address this, we implemented a Data Lakehouse architecture in place of the warehouse. Using Azure Data Factory for ingestion and Databricks jobs with Delta Live Tables for ELT, we created an optimised consumption layer.

This shift provided a **single source of truth** for BI, **improved query times for large tables by 15x**, and enabled **real-time and near-real-time data handling**.

NVIDIA

Is the AI Factory FOMO Facing a Bubble?

With Nvidia Experts
Gert Jan van Halem and
Benjamin Højsbo

TLDR

Biggest Surprise of 2025: The immediate, "out-of-the-box" 5x speed-up achieved using NIMs, hiding hardware complexity from developers.

2025 Business Shift: The "digital-first" approach using Omniverse, where massive infrastructure is fully simulated before physical build-out.

2025 Critical Lesson: NVIDIA invests heavily in enablement to ensure GPUs are actually used in production. Hardware alone is not enough; software bridges the gap.

Overhyped Technology in 2025: The singular focus on hardware sales distracts from the non-negotiable need for the software layer.

Customer Conversation Shift in 2025: The focus has shifted to software performance (NIMs) and simulating complex infrastructure (Omniverse) before physical construction.

Legacy to Retire in 2026: The need for data scientists to manually optimise models for hardware; NIMs automate this complexity.

Biggest Challenge for 2026: The powerful platforms are not "plug and play." Enterprises need expert partners to bridge the gap between technology and real business value.

Non-Negotiable Investment for 2026: NVIDIA Inference Microservices (NIMs) to boost model speed 5x "out of the box," allowing developers to focus on business logic.

Is the AI Factory FOMO Facing a Bubble? With Nvidia Experts Gert Jan van Halem and Benjamin Højsbo

Experts

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Gert Jan van Halem is Devoteam's Group CTO and a lifelong computer science enthusiast. As Devoteam's CTO, he investigates what drives Devoteam's customers and IT trends to provide technical direction. Adding value to the customers is the primary driver of his research.

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Benjamin Højsbo is a Principal Consultant at Devoteam, driving advanced AI infrastructure and data solutions on NVIDIA technology. Previously, after 12 years at Big 4 Management Consulting, he led R&D at PiKNiK and owned NextWeb. He is recognised as a technology leader for scaling tech innovation and his remarkable project leadership.

NVIDIA

NVIDIA's 2025 stock market success, driven by a global rush to build "AI factories," is undisputed. But beyond the headlines of hardware sales and "neo-cloud" investments, a more profound need is clear. As we look to 2026, the story is not only about the silicon, but also the software layer that turns this hardware into real solutions.

With market watchers debating investment bubbles, where is NVIDIA placing its focus beyond just selling more hardware?

While market watchers debate investment bubbles or the new 'dot com' crash, NVIDIA is also adding a focus on enablement. Their goal is simple: ensure the massive GPU infrastructure sold today becomes the foundation for the business breakthroughs of tomorrow. "NVIDIA actively asks not to sell GPUs. They ask to help bring workloads to production," reveals Gert Jan van Halem, Group CTO at Devoteam. "If the computing power doesn't get used, next year nobody will continue to buy at this pace". NVIDIA's strategy is based on a software ecosystem, simulation technologies, and a network of expert partners capable of bridging the gap between dream and reality.

What does this "software ecosystem" look like in practice? How does it create value?

The most immediate value for many businesses lies in the NVIDIA Inference Microservice, or NIM. Benjamin Højsbo, an AI infrastructure expert at Devoteam, highlights the impact: "If I run the Open AI Model using Ollama, I can get perhaps around 100 tokens per second. If I use a NIM... run it on the same H200 GPU, I got a five-time speed up out of the box".

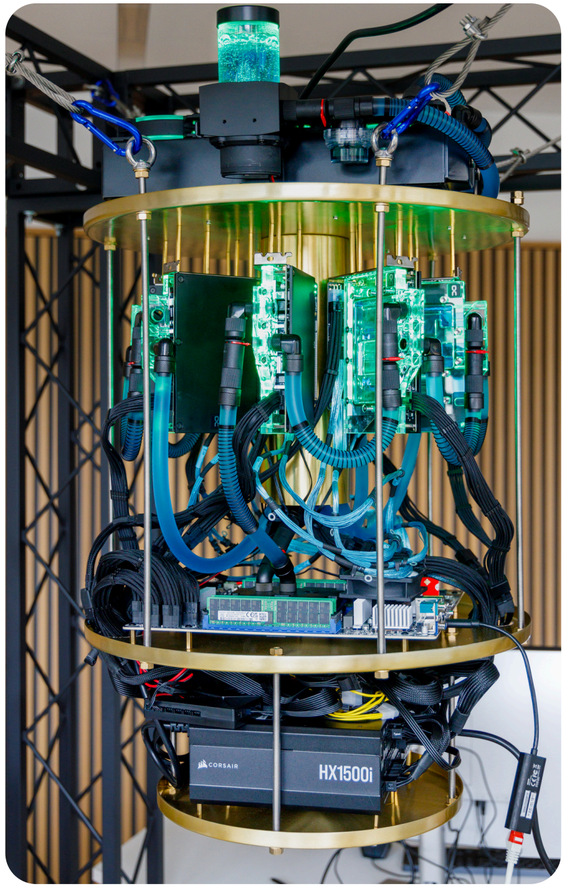
A 5x performance boost, achieved "out of the box" without manual tuning, is a game-changer. "I see the value in that," Højsbo adds. "Now your data scientist does not have to sit and optimise a model. Now they can focus on the business logic instead".
This is the core of the enablement strategy: hiding the hardware complexity so developers can focus on solving business problems. Højsbo continues: "Devoteam is already deploying NIMs to build new tools, such as AI Avatars that capture nuanced emotional cues when gathering feedback."

> **Devoteam is already deploying NIMs to build new tools, such as AI Avatars that capture nuanced emotional cues when gathering feedback.**
>
> - Benjamin Højsbo

Beyond these immediate speed boosts, what are the more futuristic applications NVIDIA can already bring today?

Perhaps the most futuristic, yet practical, application of NVIDIA's platform is the rise of the "digital-first" approach. Instead of building a physical factory and then creating a digital twin to monitor it, the entire process is inverted. "NVIDIA is pushing their digital twin," says Højsbo. "They've announced a new reference architecture for 'gigawatt factories' where you can simulate everything, electricity, networking, cooling, in a digital twin *before* construction".
The power of this approach, enabled by the NVIDIA Omniverse platform, is remarkable. The most impressive example is the Colossus Supercomputer, a massive facility housing 100,000 GPUs.

It "was fully simulated in Omniverse before construction began," allowing for efficient planning that led to its "incredibly efficient construction, with all wiring and configuration completed in just 19 days".



Are these platforms, like NVIDIA Omniverse, being used by businesses today?

Devoteam is already using these NVIDIA platforms to build the next generation of solutions:

First, Exploring Agentic AI with 3D Immersion: This technology is being used to explore the future of Agentic AI. A new prototype uses NVIDIA Omniverse to create 3D immersive environments where multiple AI agents collaborate. These agents use NVIDIA Riva for voice interaction to welcome a visitor, leverage NVIDIA vision models to scan an ID, and hold a meaningful conversation.

Secondly, Transforming Engagement with AI Avatars: To move beyond traditional, time-consuming surveys, Devoteam developed a new AI Avatar solution. These customisable avatars are powered by large language models and integrated with NVIDIA NIMs, which significantly enhance processing speed. This allows the avatars to conduct dynamic, interactive dialogues that capture not just verbal responses but also "crucial emotional cues," yielding richer, more meaningful insights from stakeholders.

These sound like powerful, complex solutions. Is this technology 'plug and play' for the average enterprise?

Despite the power of these tools, it may sometimes "seem like easily adopted solutions". The reality, as Højsbo notes, is that "it's not plug and play" for an enterprise. "NVIDIA provides powerful reference designs, but... enterprises will need experts to implement this and bridge the gap between the technology and their specific business value".

This is precisely why the partnership ecosystem is non-negotiable for NVIDIA's success. "NVIDIA 'is not a services company'," says van Halem. "They rely on partners like Devoteam to help companies bring use cases to production".

For Devoteam, the partnership is a powerful lever. "Partnering with Nvidia enables great use cases". NVIDIA helps move the conversation to concrete solutions, such as the AI-powered personalisation we are deploying together with a leading sports retailer in Europe. Their goal? Tailoring in-store digital screens to shopper demographics in real-time.

So, if it's not about just buying tools, what is the real trend for businesses heading into 2026?

For most organisations, the key trend for 2026 is not about finding the "next big enormous AI thing". According to van Halem, the message for business is clear: 2026 will be the year of strengthening foundations.

> We have to build the foundation strong to really get value out of it.
>
> - Gert Jan van Halem

The focus must be on security, infrastructure, data and platforms. It is this thoughtful, foundational work that will turn the extraordinary promise of AI into a sustainable business reality.

Top 3 NVIDIA Technology Highlights

NVIDIA AI Enterprise

This is the **complete toolkit** and **operating system** for a company's AI strategy. It's the broad, foundational software layer that gathers all the complex libraries, development tools, and frameworks that data scientists need. Its purpose is to provide one stable, secure, and supported platform for the entire AI lifecycle: from **building** and **training** new **AI models** to **deploying** and **managing** them in a business environment.

NVIDIA NIM (Nvidia Inference Microservice)

This is the high-performance **engine** that plugs into the AI Enterprise foundation. Once you've built an AI model, you need to run it (a process called "inference"). A NIM (NVIDIA Inference Microservice) is a pre-packaged, highly optimised "runtime" that makes your AI model run incredibly fast and efficiently. Its key value is **automation**. Instead of data scientists spending weeks or months manually tuning the model for a specific GPU, they can just "load" their model into a NIM. The NIM automatically handles all the complex optimisation, delivering a massive speed-up. This frees up developers to focus on solving business problems instead of technical-level hardware tuning.

NVIDIA Omniverse (Digital Twins):

This is the **application layer** that uses the power of the first two. Omniverse is a platform for building and simulating "Digital Twins"—perfectly realistic, 3D virtual replicas of real-world environments, such as a factory, a city, or a new data centre. This is where "Physical AI" comes in. A company can use Omniverse to design an entire "AI factory" in this virtual space. They can then use AI models (built with **AI Enterprise** and run by **NIM**) to simulate the factory's operations, test robotic workflows, or optimise energy consumption *before* a single piece of hardware is bought or a single concrete block is laid in the real world.

Use Case: Exploring the Future of Take-Back Operations

A leading global manufacturer is actively exploring the use of a collaborative digital twin platform as part of its innovation agenda. One of the initial test cases is the conceptual design of a new take-back factory. This initiative represents how immersive, collaborative simulation environments might reshape industrial design and execution in the years ahead.

The take-back factory concept is fundamentally different from traditional manufacturing setups. Instead of producing new products from raw materials, take-back operations focus on collecting, disassembling, and refurbishing used products and components for reintegration into the value chain. especially valuable when developing something entirely novel, like a take-back facility, where no pre-existing blueprint exists.

This digital platform is also being evaluated as a foundation for future physical AI integrations, including robotics and humanoids. While this is still a vision for the future, the virtual metaverse could serve as a training and validation environment for autonomous systems. The company sees value in establishing this virtual layer now to prepare for intelligent automation scenarios down the line.

Through these early experiments, the manufacturer aims to assess how a collaborative, visual-first design process can enhance alignment, reduce risk, and accelerate innovation for new types of factory infrastructure. This case serves as an example of how emerging platforms may contribute to more circular and flexible manufacturing models in the digital age.

This reverse logistics model introduces unique challenges in terms of material variability, workflow complexity, and quality assurance, demanding a new design mindset.

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- Benjamin Højsbo

The company is experimenting with the collaborative platform to model the factory layout, logistics flows, and production line configurations. By integrating standard simulation tools into this virtual environment, teams are exploring how digital simulations might support the testing and optimisation of design concepts before physical implementation.

A key aspect of this exploration is the platform's ability to bring together various functional roles, such as engineers, architects, and logistics specialists, into a single shared environment. This collaborative capability is considered especially valuable when developing something entirely novel, like a take-back facility, where no pre-existing blueprint exists.

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Can 30-Year-Old BI Teams Reinvent Themselves Before AI Makes Them Obsolete?

With Snowflake Expert
Laurent Letourmy

TLDR

Biggest Surprise of 2025: The launch of Snowflake Intelligence, a specialised agent that is fundamentally reinventing data analysis and BI teams.

2025 Business Shift: AI is integrated into BI, moving it from a hard-to-justify infrastructure cost to a source of autonomous, actionable insights.

2025 Critical Lesson: AI speed is a game-changer; complex tasks now take minutes, fundamentally altering project timelines.

Overhyped Technology in 2025: OpenFlow (Datavolo), which has been slow to mature in usability and connector richness.

Customer Conversation Shift in 2025: Moved from concept to production reality, driven by agent demonstrations solving problems in minutes instead of weeks.

Legacy to Retire in 2026: Traditional ETL and BI tools built on 30-year-old architectural patterns.

Biggest Challenge for 2026: Organisational change management.

Non-Negotiable Investment for 2026: Pre-design documentation and embedding business semantics (semantic layers) in the platform.

Can 30-Year-Old BI Teams Reinvent Themselves Before AI Makes Them Obsolete? With Snowflake Expert Laurent Letourmy

Expert

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Laurent is the Head of Data at Devoteam France, a role he took following the January 2021 acquisition of Ysance, a company he co-founded and led as CEO for 19 years. With over two decades of data expertise and certifications in Dataiku and Snowflake, Laurent drives Devoteam's data strategy, growth, and partnerships. He has a passion for empowering businesses to make data-driven decisions and has a history of successful ventures, including two IPOs.

> **Traditional ETL tools and conventional BI tools designed on 40-year-old architectural patterns must be retired.**
>
> - Laurent Letourmy

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At the start of 2025, we made a bold call: traditional Business Intelligence platforms were becoming obsolete. We outlined five pillars for modern data architectures, semantic layers, operational data hubs, data products over medallion, observability over quality checks, and treating unstructured data as first-class citizens.

Twelve months later, the prediction held. But the pace of change exceeded expectations.

In this report, Laurent Letourmy, Head of Data at Devoteam, delivers an honest assessment of what actually materialised in 2025 and what's coming in 2026. Drawing from client deployments and platform implementation work, Laurent reveals which technologies moved from theory to production, which fell short of their promise, and where the market is heading next.

Snowflake Intelligence emerged as the year's defining surprise. Agents now solve data quality issues in minutes that previously consumed weeks of analyst time. BI teams built on 30-year-old practices face fundamental reinvention. And legacy ETL tools that powered enterprise data for decades are being retired.
This is a practitioner's view from the trenches: the concrete shifts reshaping data platforms, the organisational challenges they create, and the strategic moves required to stay ahead in an AI-first data landscape.

2025: Reflections & Lessons Learned

What was your single biggest technology surprise of the last year?

The launch of Snowflake Intelligence represented the most significant development of 2025. While semantic layers were expected to gain prominence, the arrival of a specialised business analyst agent capable of handling complex queries and reasoning was unexpected. This goes beyond the typical agentic capabilities being released across the market, it's a purpose-built agent for data analysis that demonstrates genuine problem-solving ability. As an early partner on this initiative, we've seen firsthand how it transforms data interaction.

> **AI capabilities on Snowflake have accelerated both platform deployment and use case delivery.**
>
> - Laurent Letourmy

Overhyped: What technology or trend do you believe was the most overhyped in the last 12 months?

OpenFlow (formerly Datavolo) hasn't yet delivered on initial expectations. The product functions, but requires greater connector richness and improved usability. While it was acquired and integrated into the Snowflake ecosystem, it still lacks the intuitive design and ease of use that characterise Snowflake's native features. The market collectively recognises that full maturity will take longer than initially anticipated.

Business Model Shift: Which competitor or client's recent strategic move surprised you, and what did you learn from it?

I prefer not to engage in direct competitive comparisons; talking too much about competition does not really add trust or value on what we deliver. However, Snowflake's recent quarterly growth rate increases indicate strong market validation. After a period of market observation, the platform has established itself as a credible player in the AI space, which is reflected in customer adoption patterns.

Biggest Lesson: What is the single most important business lesson you learned in the last 12 months?

AI capabilities on Snowflake have accelerated both platform deployment and use case delivery. Features that previously required extensive development time can now be implemented in days or even minutes. For example, call center transcription, including speaker identification, can be executed with a single SQL function in less than 10 minutes. Additional AI layers for sentiment analysis, theme identification, or outcome classification require only one more processing step. This speed fundamentally changes project economics and timelines.

2026: Future Focus & Strategy

Critical Change: What is the single most critical tech change happening within your core area right now?

The integration of AI into business intelligence represents the biggest shift. Traditional BI has been costly with unclear ROI, necessary infrastructure (do you know a company that would accept running without BI ?), but difficult to justify financially. BI presents information but does not directly drive decision-making.

AI changes this dynamic completely. With semantic layers and intelligent agents, we can now ask complex analytical questions and receive actionable insights. For instance, AI can identify product cannibalisation as the root cause of declining revenue when launching new products, an analysis that would require days or weeks of manual work with spreadsheets across multiple teams. A standard BI dashboard typically won't make these connections unless it is specifically designed to do so. AI can autonomously cross-reference data and surface insights that weren't anticipated in the original dashboard design.

This affects tooling, architecture design, implementation approaches, and end-user impact across the entire BI landscape.

Investment & Risk: What is your 12-month non-negotiable technology investment priority, and what is the biggest business risk if we don't execute it?

Documentation must be the priority. The risk of deploying AI everywhere, in documentation generation, implementation, testing, and quality assurance, is losing precision about objectives. We risk forgetting what we actually want to accomplish.

Too often, teams retro-document what has been developed, generating documentation that may not be thoroughly reviewed. Only during usage do discrepancies emerge: "This KPI wasn't supposed to work this way." The problem is that requirements weren't specified upfront.

> **Approximately 70% of data teams are BI-focused, operating with methods largely unchanged for 30 years. These teams must now transition to AI-enabled data practices with significantly different patterns.**
>
> - Laurent Letourmy

Documentation must precede design and development. Product owners should define requirements clearly before development begins, not reverse-engineer documentation from completed work. Additionally, business context matters. Data carries business meaning but is stored in technical schemas and models. If we don't embed business semantics directly into the platform, not just in dashboards at the "last kilometer", we'll miss significant opportunities. This is the purpose of semantic layers, now stored within the data platform rather than in BI tools.

Finally, AI in data engineering and similar processes remains less mature than in standard digital development or UX workflows. AI adoption should be strategic and purposeful, focused on acceleration and scale, not applied indiscriminately.

Retirement: What is the one legacy system or way of thinking we must completely retire in the next two years?

Traditional ETL tools and conventional BI tools designed on 40-year-old architectural patterns must be retired. These systems are built on outdated design principles that don't align with modern data platform requirements. At a certain point, I will question the real usage of Data Catalog as a standalone tool.

AI Impact (Future): How has the rise of AI fundamentally changed the conversation you have with customers today?

Agentic AI has moved from concept to operational reality. When we demonstrate agents solving complex problems, customers recognise the practical value. One client recently reported that an agent identified a data quality issue related to cream viscosity in 5 minutes, an analysis that would have previously required 3-4 weeks of manual work across multiple people using spreadsheets.

These aren't lab results or staged demos. This is production data delivering real business outcomes. Once customers see this capability, we can discuss the full scope of required changes: data modelling, data products, semantic layers, observability, data quality, real-time ingestion for operational data, and more. Starting from proven results, we can work backwards through the entire data chain to source systems, rebuilding platforms with modern architectures.

The next major conversation topic will be the practical implications of these capabilities: how to restructure teams, processes, and platforms to leverage AI effectively at scale.

Customer Challenge: What is the biggest challenge for our customers today?

Approximately 70% of data teams are BI-focused, operating with methods largely unchanged for 30 years. These teams must now transition to AI-enabled data practices with significantly different patterns.

The challenge is learning new approaches without discarding accumulated expertise. The foundational knowledge, modelling, quality management, documentation, testing, analytics, KPI definition, aggregations, calculations, remains valuable. However, the implementation will change: new architectures, technical solutions, automation approaches, CI/CD practices, and development patterns must be learned.

Essentially, teams must do the same work differently. This organisational change management is complex and can be unsettling for experienced professionals, as some roles may eventually change.

Competition: What sets your technology or solution set apart from our competitors in the market today?

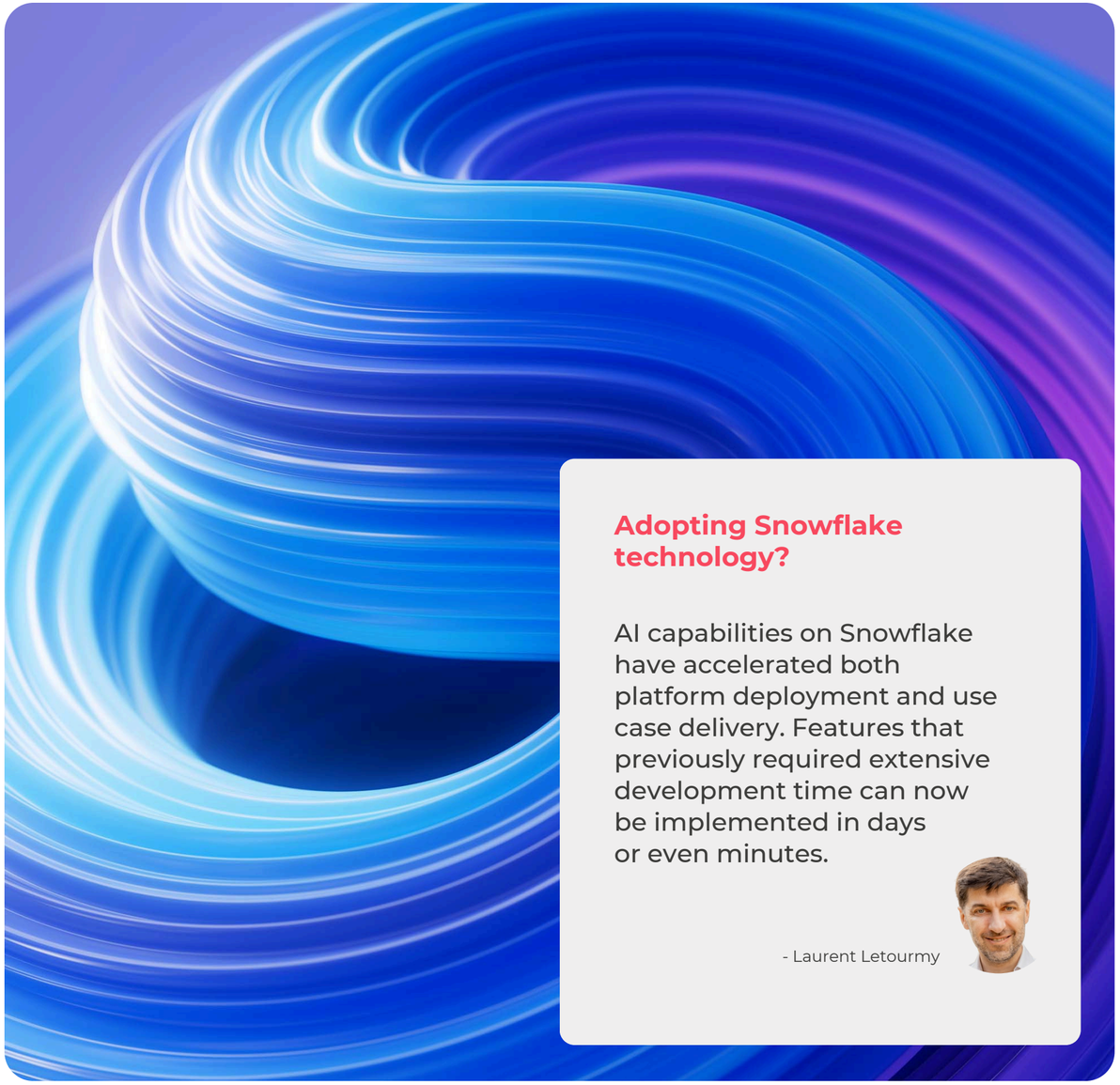
Three factors differentiate Snowflake: First, its **Multi-cloud architecture**: The same platform operates consistently across all cloud providers. Secondly, their **True SaaS model.** It incurs minimal administrative overhead compared to platforms that require substantial administrative resources. This operational simplicity is often underestimated but significantly impacts the total cost of ownership. And of course, **simplicity at scale**: A lot of people on the market still love to “wire the cables”. I observe that Snowflake customers love simplicity and easily recognise that they can deliver faster value. Despite continuous platform expansion, Snowflake maintains ease of use. Snowflake Intelligence exemplifies this, it's one of the most advanced yet accessible Data Product in the market. Achieving sophistication without complexity is rare and valuable.

Top 3 Technology Highlights

AI SQL Functions
Native AI capabilities integrated directly into SQL, eliminating the need for external processing or complex integrations.

Snowflake Intelligence
Expect substantial evolution driven by strong market demand and an extensive product roadmap. This will be a focal point for platform development.

Horizon
The comprehensive and integrated governance catalogue covering data management, documentation, and quality. This addresses the critical need for structured governance as data volumes and complexity increase.



Adopting Snowflake technology?

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- Laurent Letourmy

AI-driven tech consulting

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