WAYS OF TECH

Actionable insights for leaders looking to seize new opportunities

SOLITA

TREND REPORT 2025/2026

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FOREWORD

In times of rapid transformation, clarity becomes a competitive advantage.

Technological development is accelerating faster than ever. Artificial intelligence, data-driven solutions, cloud platforms, and digital infrastructures are no longer distant aspirations - they are already reshaping how we work, govern, and create value.

At the same time, companies and public organisations face a more complex reality: evolving regulations, geopolitical shifts, increasing demands for transparency and sustainability, and growing pressure to prove real impact from their digital investments.

With so much change unfolding at once, many leaders find themselves asking: Where do we focus? How do we move beyond exploration to execution? How do we scale what works and do so in a way that truly supports our business and our people?

This report is our response to those questions. It is not about predicting the future. It is about helping to interpret what is already happening, making sense of the signals, filtering what matters, and offering concrete insights based on real-world experience. Our experts and senior leaders, working across industries and public institutions in 10 countries, share what they are seeing: what's delivering results, what's holding organisations back, and what choices will shape the next phase of digital transformation.

The trends themselves are widely recognised. But the real challenge lies in translating them into business impact. That takes more than technology. It requires clear strategic intent, alignment across business and IT, a people-centric approach to change, and the ability to adapt continuously as new tools and opportunities emerge.

This moment also challenges IT consultancies like us. More than ever, we must deeply understand our customers' context and pain points, recognise new opportunities and risks early, and evolve our own offerings with agility and purpose. In a landscape shaped by disruption, relevance must be earned again and again through insight, speed, and the ability to deliver meaningful outcomes.

We hope this report helps you cut through the noise, inspires strategic dialogue, and supports confident decisions - on where to invest, how to lead, and how to create lasting value in the era of AI and beyond.

OSSI LINDROOS
PRESIDENT AND CEO, SOLITA

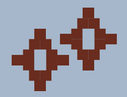
TRENDS

1 AI is all about humans

2 From AI capability to AI impact

3 Embedded intelligence

– AI everywhere, for everyone

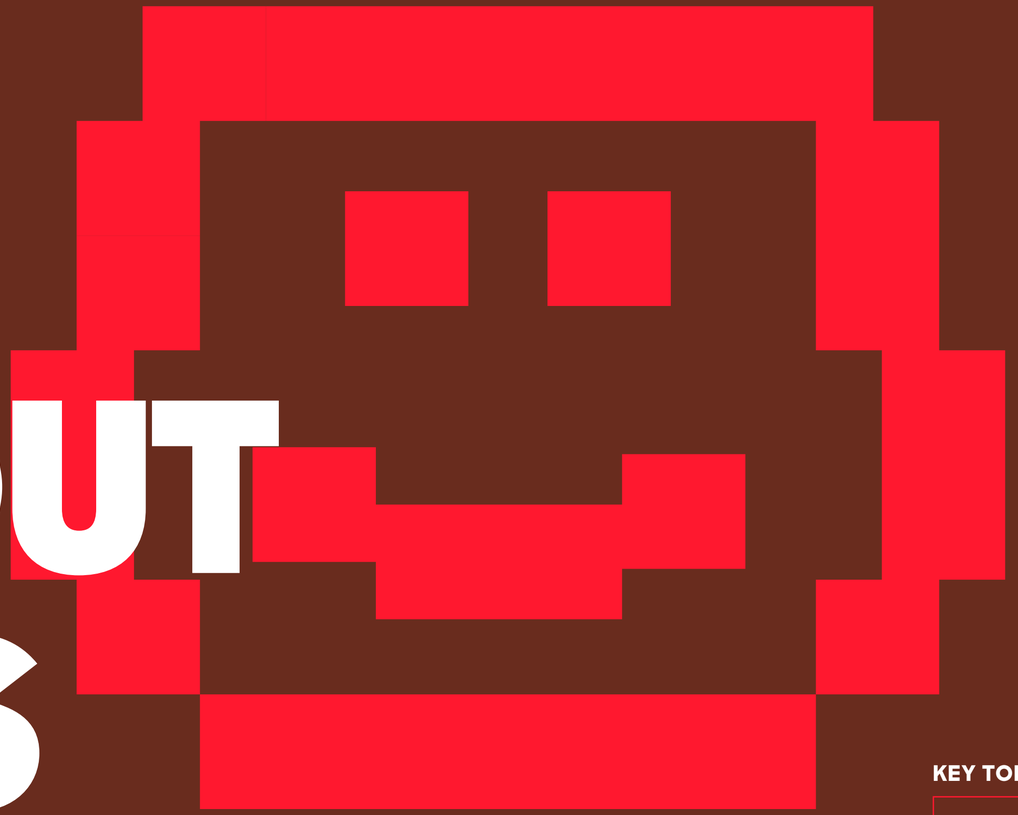


4 Tech vendor (r)evolution

5 Hardware's comeback

6 Geopolitics shape tech

1 AI IS ALL ABOUT HUMANS



As AI integrates further into our lives, it's increasingly important to understand how these technologies impact our humanity. We must design AI systems that enhance, rather than diminish, human agency and creativity. Innovation requires more than technological advancement; it requires a deep understanding of societies and human needs.

KEY TOPICS

1. **Better keep hold of the reins as AI speeds up**
2. **AI is a business skill not an IT one**

1

Better keep hold of the reins as AI speeds up

AI should be understood not as human-like intelligence, but as a sociotechnical system embedded within human contexts, emphasising its distinct capabilities and limitations. It should always be approached and designed locally, nested within specific social environments. To build trust and generate lasting value, we must move toward sustainable AI practices that prioritise social value and support, rather than replace, human agency.

The American science-fiction writer **Ted Chiang**, in an interview with the Financial Times, called artificial intelligence "a poor choice of words in 1954". His preferred term was "applied statistics", a more grounded description that avoids the misleading human-based metaphor of intelligence. AI systems are becoming more capable, but in ways that are fundamentally different from those of humans.

Recognising this distinction is essential. Equating machine performance with human intelligence fosters false expectations. It obscures AI's limitations and encourages us to delegate tasks that require human judgement and care. This is why AI must always be designed as a sociotechnical system – technology carefully positioned within human processes and social environments. Only this foundation enables trust and lasting value.

Three key shifts in how we think about human-centered AI:

Responsible AI as embedded practice	Responsible AI should not be treated as a separate initiative but as a set of principles and practices integrated across all AI and data work – especially in areas with high societal impact and uncertainty. We call this approach sustainable AI.
Beyond risk: toward social value	While much attention has been placed on minimising human risks, this focus can narrow our understanding of the broader human dimensions of AI. A sociotechnical perspective invites us to see AI as embedded in complex social systems – revealing not only potential harms but also creative, human-centric value-generating possibilities well beyond the usual metrics of efficiency and convenience.
Creative reframing	We need more imaginative ways of thinking about AI. Not as a substitute for human agency, but as a tool that supports and extends it. This means resisting narratives that compare AI to humans and instead embracing its unique capabilities.

> " Forget the generic – design for situated value!

ANTTI RANNISTO
INSIGHT LEAD

2

AI is a business skill not an IT one

While AI increasingly handles a variety of tasks, it's humans who shape and guide its direction. Humans provide context and direction, designing and building the systems. To stay ahead, organisations must invest into developing AI literacy, support learning, and reward those who adapt. Combining curiosity and machine efficiency creates value and helps in solving the right problems.

AI advances quickly, and machines now handle more tasks. But the role of humans remains essential: while tools get the job done, people still shape direction and meaning.

Machines process both structured and unstructured data, but to ensure reliability in business, their operational scope must be narrow. It's a trade-off that limits flexibility and can make things fragile when conditions change. Human oversight is essential in navigating changes such as shifts in strategy or supply disruptions.

To support this, organisations need AI literacy across all levels, enabling people to understand model outputs, adjust tools as needed, and contribute meaningfully. AI literacy should be a foundational skill across the organisation, not just for technical teams.

Including time for reflection and continuous learning in daily work strengthens collaboration between humans and machines, while recognising and rewarding growth helps to keep teams curious, adaptive, and resilient. Ultimately, machines expand what's possible, but humans decide what matters. True value comes from combining tech with insight.

> " Even though AI is advancing fast and giving us incredible capabilities, it's still our own insight that determines how those tools are used. Knowing the work deeply, understanding the context it lives in, and always learning – that's what makes the real difference. The tech is impressive, but it's how we apply it that creates real value."

TOMASZ MUCHA
GENAI ACCELERATION LEAD

HUMANS STILL HAVE A KEY ROLE

Key takeaways

1

Design AI as sociotechnical systems

Always situate AI within human practices and social environments. Designing AI without considering where it's embedded in real-world contexts risks disconnecting from the values, needs, and judgments of those it serves.

2

Design work to promote learning and contextual insight

Work processes should be structured to help employees build experience, insight, and context over time. Encourage reflective practices, crossfunctional collaboration, and autonomy, allowing people to develop expertise and make informed decisions as they engage with AI tools.

3

Make continuous learning part of performance and rewards

Integrate learning objectives into development plans, performance reviews, and targets. Recognise and reward ongoing skill development and adaptability, so that continuous learning becomes a built-in expectation, driving both personal growth and organisational resilience.

2 FROM AI CAPABILITY TO AI IMPACT

AI technologies are quickly moving from theoretical discussions to real-world implementations and value generation. This highlights the need for strong domain expertise: understanding the business and its customers beyond just the technology is essential for developing meaningful AI applications. Such insight ensures that AI solutions are tailored to specific needs and challenges, aligning closely with business objectives.

KEY TOPICS

1. AI X FINANCE
   Time to shift from compliance to impact
2. AI X DEFSEC
   Battlefields are becoming more intelligent
3. AI X SUPPLY CHAIN
   End-to-end transparency is on the horizon
4. AI X PHARMA AND MEDTECH
   Medical devices become software
5. AI X COMMERCE
   Agentic commerce: agents transform shopping

1 **AI X FINANCE**

Time to shift from compliance to impact

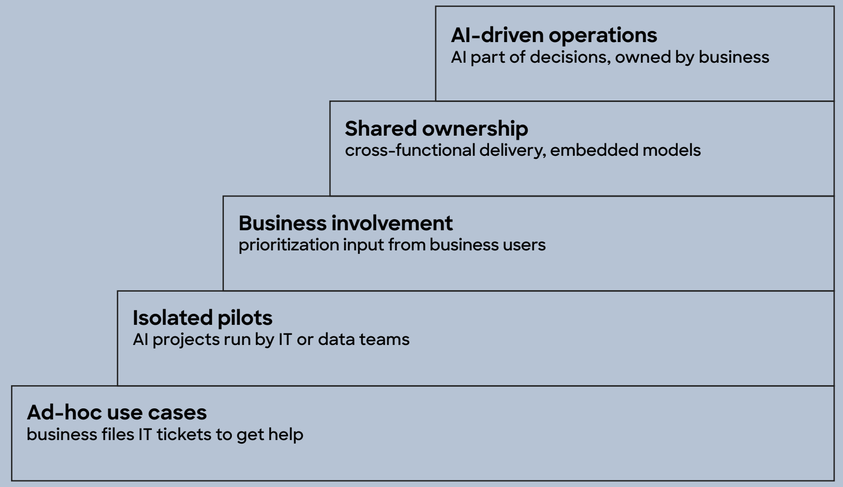
AI is becoming a critical tool in finance, but its real impact depends on how well it is embedded into daily decision-making and operations. From fraud prevention to risk modeling and customer service, success comes from combining technology with deep domain understanding.

Many financial institutions have invested in AI and the real bottleneck of the situation is not technical, but organisational. When discussing with business users across customer engagement, sales, risk management, backoffice operations and fraud prevention, one message stands out: there is strong demand for AI but truly putting it to use struggles to get prioritised and into production. Regulatory needs often take up most of the focus, while business-driven innovation remains on the sidelines.

When ownership and direction from the business is missing, teams are forced to push isolated initiatives on their own. Often, this means submitting individual IT tickets just to access the right data or get technical support. This fragmented approach leads to slow progress and fails to deliver the kinds of results that would transform operations or customer experiences.

To generate real impact, AI must be embedded into the core of business processes and decision-making. That requires giving business units the mandate to define priorities, secure resources and take responsibility for how AI is applied. Only then can AI evolve from scattered efforts into a meaningful driver of performance.

"From ticket to transformation" – AI ownership maturity ladder



> AI cannot be outsourced to IT. As long as it remains a support ticket, we will never see its true value. Real impact happens when the business takes charge.

JUUSO LEHTO
HEAD OF FINANCIAL SERVICES

2 **AI X DEFSEC**

Battlefields are becoming more intelligent

Autonomous systems are changing the ways we defend our societies and how conflicts are fought. As drones and other uncrewed platforms evolve, AI technologies become the key enabler of mission autonomy, situational awareness, and scalable operations. Future advantage lies not in hardware, but in software-driven intelligence and adaptability, and applying AI is mandatory for success.

AI is rapidly shifting from lab environments to real-world military and national security operations. Autonomous and uncrewed systems, once manually piloted, now operate across air, land, sea, and even space domains with increasing independence. These platforms are reshaping not just the battlefield, but how we secure borders, monitor critical infrastructure, and respond to emerging hybrid threats.

AI technologies such as swarming algorithms, object recognition, navigation in GPS-denied environments, and real-time decision-making are essential in unlocking scalable autonomy. But hardware alone is not enough: true impact lies in building AI as a continuous capability, integrating it with data infrastructure, mission systems, and operational culture.

As the pace of AI innovation accelerates, defence and security sectors must adopt an agile, software-driven mindset where autonomous systems evolve like digital products, not static machines.

> Autonomous and uncrewed systems bring strategic and operational advantages for defence forces, national security, and civil resilience. To unlock their full value, we must invest in AI-driven autonomy and ensure open, modular system architectures that support fast integration and adaptability. The digital capabilities will evolve rapidly, so constant improvement is needed to maintain the advantage.

EVA SULA
HEAD OF DEFENCE & SECURITY

3 **AI X SUPPLY CHAIN**

End-to-end transparency is on the horizon

In our age of AI, effective operations and supply chains are key in achieving cost efficiency and meeting ever increasing customer expectations in digital channels. The good news: most business value from AI, and even GenAI, can be found in the application of AI to improve core business processes and drive transparency across the value chain.

Amid all the current buzz, AI in operations and supply chain management is far from new. In fact, traditional AI – software applications powered by data, analytics, algorithms, and machine learning – continues to offer the greatest business value. Ongoing advancements in cloud infrastructure, data management, connectivity, and algorithm development are making AI models more powerful and effective than ever.

In operations and supply chains, AI delivers the most value when it's used to improve and optimise core processes. Strong use cases include enhancing efficiency in areas such as assortment planning, product development, forecasting, pricing, yield management, quality improvement, inventory optimisation, as well as warehouse, transportation, and workforce planning. GenAI in supply chain management is just emerging from the hype cycle and remains in its early stages but shows potential in helping business users interact with and interpret outputs from AI systems more intuitively.

Ultimately, AI is a tool: a platform for driving improvements in core processes and ways of working. Lasting success depends not just on the technology, but on effective process management, high-quality and accessible data, and strong leadership to support change and ensure adoption at scale.

> AI and GenAI are just passing the peak of the hype cycle. Greatest AI business potential lies on classic use-cases in core operations and processes where data and algorithms can be leveraged and automated in new ways. To succeed, experiment fast to prove value, keep your processes clear, inspire your people to learn new skills and ways of working and put data in the core.

ANDERS HEDFALK
HEAD OF RETAIL

4 **AI X PHARMA AND MEDTECH**

Medical devices become software

AI in pharma and MedTech is maturing, shifting from specialised tools to enabling patient-centric care. Integrated AI systems drive key improvements in medication adherence, streamlining real-world evidence collection, and supporting regulatory compliance. This evolution fuels the development of impactful, scalable digital therapeutics, heralding the dawn of Software as Medical Devices (SaMD) era.

As digital pharma matures, AI transitions from experimental technology to a core component. It can be used in several ways: from AI-driven early drug discovery and real-time glucose monitors, to apps guiding medication adherence or tracking disease progression. This expanding role of AI now includes enabling comprehensive patient journeys and enhancing patient experiences.

The era of Software as Medical Devices (SaMD) is here. Success demands more than technological prowess; it demands adherence to critical regulations like the MDR, EHDS, and the AI Act, coupled with building unwavering consumer trust and fostering robust collaboration models. Our analysis consistently shows that companies integrating device data, human-centric design, and regulatory foresight outperform those that develop solutions in silos.

Particularly important are advancements in reimbursement frameworks, AI-powered compliance tools, and the growing field of digital therapeutics. Ultimately, companies must create solutions that are clinically valuable, commercially viable, and strictly regulatory compliant, moving beyond hype to deliver sustainable, real-world impact.

> AI delivers its true impact in healthcare when it moves from a promising concept to everyday patient journey support – predicting, guiding, and connecting patients and professionals in meaningful, compliant, and personalised ways.

RISTO KAIKKONEN
DIRECTOR, SOLITA HEALTH

5 **AI X COMMERCE**

Agentic commerce: agents transform shopping

As AI agents evolve from simple chatbots to autonomous "AI twins", customer interactions are shifting. Tomorrow's AI will shop, negotiate, and solve problems for users, possibly revolutionizing how we understand marketing and sales channels. However, to truly thrive, brands will have to balance automation with human-centric touchpoints.

Buying online often still means navigating endless menus, but the future is arriving fast: AI agents, or "AI twins," are starting to take control of transactions, making shopping seamless and almost invisible.

Tech giants are already releasing tools to make this innovation available to buyers and sellers. Google's AI Mode now has Gemini transform the entire shopping experience, from product discovery to checkout. For example, it can track the price of the product and buy it when it drops to your desired level.

Visa's and Mastercard's new integrations let users minimise their involvement in transactions: you might set preferences and a budget and let the AI do the rest, confirm repeating a purchase, or have the AI get tickets as soon as they become available.

Meanwhile, Amazon's "Buy for Me" feature has AI agents purchase third-party products for users so they can access a wider selection without leaving the Amazon ecosystem.

In B2B settings, AI agents are already negotiating contracts in real time, enabled by protocols like MCP and payment platforms such as Stripe's APIs.

These systems are becoming increasingly anticipatory, too. Google's XR glasses and smart devices by OpenAI's io are meant to learn user preferences, evolving into AI twins that know when to reorder essentials or grab limited-edition releases. In the near future, we may completely delegate some purchases.

> Apple's on-device AI approach, strongly emphasized at WWDC 25, has the potential to redefine how users leverage AI in their daily lives, likely including future AI agents. By harnessing contextual awareness, including active apps, location, recent photos, and ongoing conversations, Apple can deliver a far more personalized and seamless assistant experience than cloud-based models.

EMIL WASZKOWSKI
HEAD OF STRATEGY, FUTURE MIND, A SOLITA COMPANY

FROM AI CAPABILITY TO AI IMPACT

Key takeaways

1

Business impact from AI starts with ownership

Financial institutions must empower business units to set priorities, define use cases and ensure that AI is embedded into real workflows and decisions, not treated as a side project.

2

Autonomous systems redefine conflict and peacetime operations

Defence forces, national security agencies, and critical infrastructure sectors must invest now to build scalable, sovereign autonomous capabilities. Operations need to be assessed based on how the autonomy impacts them, and what are the best ways to leverage this technology.

3

Digital solutions in pharma and health must evolve

The sector needs to develop its digital capability beyond the primary focus on early drug discovery or isolated pilot projects. The shift must be towards scalable systems that provide measurable outcomes, secure reimbursement, and deliver real patient value.

3 EMBEDDED INTELLIGENCE – AI EVERYWHERE, FOR EVERYONE

AI will be embedded in everything. AI agents transform business processes and small language models offer competitive edge for specified solutions. AI changes the way we work, from design to software development. The progress of AI calls for new solutions in testing and privacy. However, it is essential to remember that in the ongoing AI boom everything is built on quality data.

KEY TOPICS

1. AI agents change the way we work
2. AI agent marketplaces are a new innovation ecosystem
3. Design practices teeter on the brink of disruption
4. Software development needs reimagining
5. Governance paves the way towards an antifragile AI
6. Your AI is as good as your data

1

AI agents change the way we work

While chatbots and the ability to retrieve and incorporate new information only scratched the surface of AI's transformative powers, AI agents and agentic workflows could significantly change how we work. AI agents can both automate pre-defined workflows as well as resolve open-ended business problems, but there are many misconceptions and pitfalls to avoid when entering the world of AI agents.

We expect agents to significantly alter our ways of working and we also believe in new markets and business opportunities for AI agents. At this point though, it's too early to identify which domains will be most affected or to gauge the extent of those impacts, given the rapid pace of technological advancement.

However, we already know that the use cases for agents will range from automating pre-defined workflows to fully exploratory approaches to open-ended business problems. These use cases could apply in all industries and lines of work.

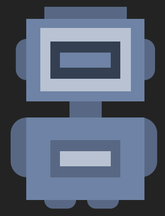
Examples of pre-defined automation include performing narrow tasks like responding to questions from a specific knowledge base, and when slightly more advanced, doing this in sequence or parallel with other agents performing similar tasks in their expertise fields. When setting our ambitions even higher, we could instruct agents to define their own tasks, sequences, loops and objectives, with the objective to respond to an open-ended business problem. This is where things get interesting!

> The copy-paste era of AI is fleeting. Modern AI agents sense multi-modal digital contexts, adapt to errors, self-assess, explore parallel approaches, spawn new agents, and design orchestration models instantly. Agentic solutions complete workflows and tackle open-ended problems with as much or as little human input as desired.

LASSE GIRS
HEAD OF GENERATIVE AI ENABLEMENT

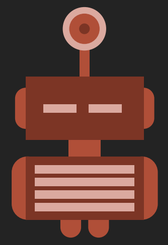
Multi-agent system scenario: Incident response automation

Each agent brings specialised capabilities to the response team, functioning like roles in a crisis unit.



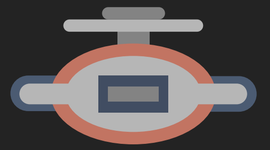
First Responder

- Fast ingestion of logs, metrics, alerts
- Executes low-latency system responses (e.g. restart service, reroute traffic)
- Sends priority signals to Orchestration Lead for escalation



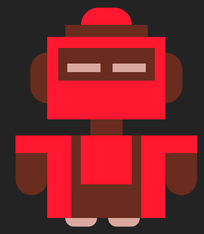
Root Cause Investigator

- Time-series and trend analysis
- Correlation discovery and risk quantification
- Proposes architectural improvements post-incident



Communication Officer

- Writes post-mortem reports
- Prepares Slack updates, emails, and status pages
- Suggests tone and message variations by audience



Orchestration Lead

- Breaks down the incident into stages
- Assigns agents dynamically
- Monitors task completion and triggers handoffs
- Escalates to human when thresholds are hit

Scenario flow: Real-time incident management

Step 1 — ALERT TRIGGERED

- System detects latency in order processing and an alert is sent to First Responder.

Step 2 — TRIAGE & CONTAINMENT

First Responder
- Reviews logs/metrics in real time and finds failed connection to 3rd-party payment API.
- Activates fallback (payment rerouting via backup provider).

Step 3 — INVESTIGATION

Orchestration Lead
- Confirms risk are under control and initiates root-cause analysis.

Root Cause Investigator
- Reviews past data and incident logs, finding repeated issues at peak hours.
- Identifies latency cascade in database loading patterns and suggests caching layer.

Step 4 — COMMUNICATION

Communication Officer
- Creates Slack summary for engineers, updates public status page, and emails customer success team, all tone-tailored for audience.

Step 5 — REVIEW & RESOLUTION

Orchestration Lead
- Confirms tasks complete, logs actions/timeline, schedules follow-up for fix.

OUTCOME

- Minimal downtime.
- Agents collaborate automatically.
- Human stakeholders get timely, accurate updates.
- Future incidents resolved faster via learnings.

2

AI agent marketplaces are a new innovation ecosystem

AI is shifting from a standalone capability to an embedded one: integrated into products, processes, and decisions across every industry. This pervasive AI wave, fueled by agent marketplaces and small localised models, promises to transform how businesses develop software and operate, creating competitive advantage while addressing privacy and regulatory needs.

Companies across industries are embedding AI into workflows to drive efficiency, insights, and innovation. AI is moving from pilot projects to a core part of strategy, rewiring processes and creating new value.

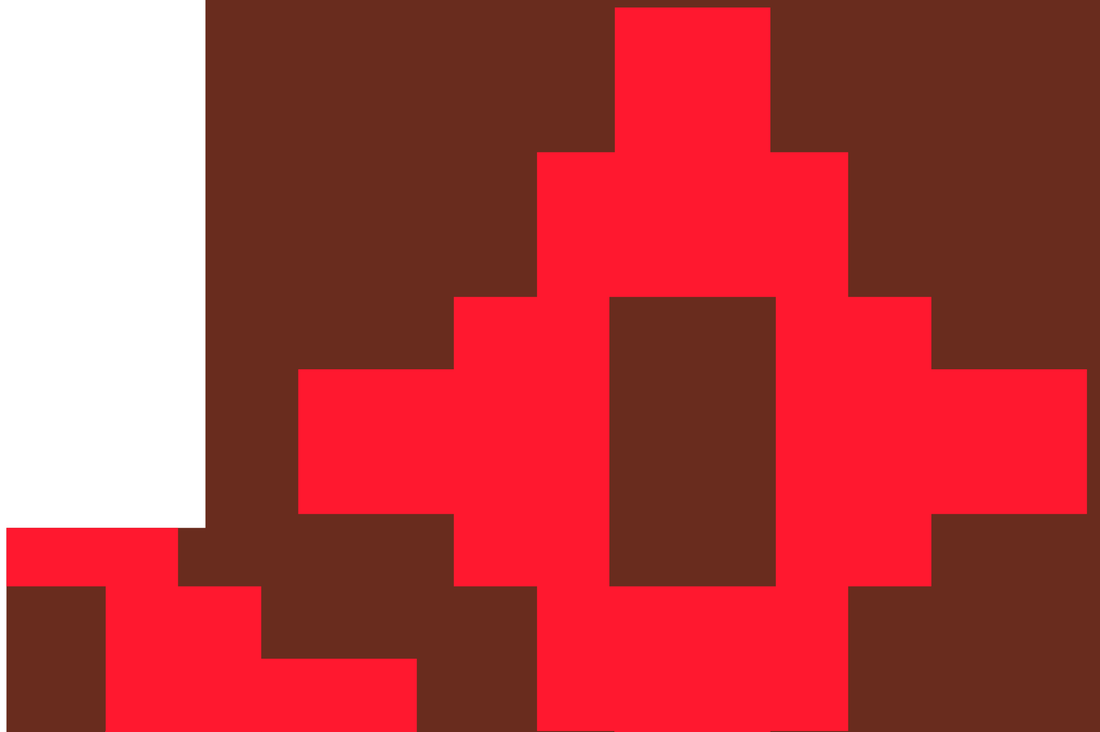
As this trend accelerates, AI agent marketplaces have emerged as game changers. These appstore-like platforms, hosted by major tech players, offer ready-made, customisable AI agents for tasks like HR, customer support, and finance, and dramatically speed up AI adoption: instead of building every AI tool in-house, companies can "shop" for proven agents.

Another key shift is toward small, local AI models. Unlike massive cloud models, these compact solutions can run privately on your infrastructure, offering tailored insights while maintaining data sovereignty - crucial for European businesses under GDPR and the upcoming AI Act.

For leaders, AI marketplaces and customisable models represent a shift to AI-as-a-service. They enable faster innovation, reduce dependency on big tech, and support responsible, scalable adoption. Understanding and leveraging these tools is essential to stay competitive in the evolving AI landscape.

> " AI agent marketplaces offer instant impact, while smaller, local language models give you control. Combining both lets businesses move fast, stay compliant, and build AI on their own terms.

JOKKE RUOKOLAINEN
TECHNICAL LEAD, AI



3

Design practices teeter on the brink of disruption

AI becomes embedded in everything. It's already transforming how businesses design, operate, and create value. Success now depends on quality data, ethical innovation, and evolving design practices. It's not just a tech shift – we must also rethink of how we work, solve problems, and lead in the AI era.

AI is not a future concept. It has been used by companies for a while already, but recent advances in large language models (LLM), combined with decreasing technology costs, have made AI tools more accessible to a wider audience than ever before.

AI is rapidly being embedded in every layer of business. From copilots to customer service agents and predictive models, AI is reshaping operations, services, and strategy. Organisations must shift from adopting tools to embedding AI as a core capability. This requires quality data, adaptive systems, and a redesign of business architecture.

At the same time, user experience must evolve into AI Experience Design (AIX), which emphasizes transparency, human-AI collaboration, and emotionally intelligent systems. Trust, clarity, and ethical interaction are critical to adoption. The future of business lies in rethinking how we design and deliver value in an AI-powered world.

> Need for value-driven AI business design and AI experience design is growing rapidly, as organisations must ensure that AI systems not only perform efficiently but also align with human needs, ethical principles, and long-term business goals, creating meaningful, trustworthy, and sustainable impact.

MINNA KÄRHÄ
BUSINESS AREA LEAD, AI BUSINESS DESIGN

4

Software development needs reimagining

AI is doing more than just speeding up development; it's changing the way we build. Work is happening at a higher level of abstraction, with teams co-creating with AI in real time across roles. Traditional phases are fading, giving way to a continuous flow. Development is no longer a solo task; it's a collaborative, AI-augmented act.

Software development has reached a turning point. With AI embedded in our tools and teams, the fundamental rhythm of building is changing. We're moving from handoffs and pipelines to real-time co-creation. In AI-first teams, abstraction increases: prompts replace boilerplate, and prototypes are generated on demand. Developers work as orchestrators of systems. This shift isn't just technical; it's structural and social.

We've seen teams reduce iteration time 100-fold by collapsing design, development, and testing into a single conversation, with AI participating as a contextual assistant. Role blending and real-time feedback loops mean that learning, decisions, and delivery happen simultaneously.

This isn't about replacing people. It's about unleashing human potential by eliminating bottlenecks. The future of development is deeply collaborative, and AI is the catalyst.

USE CASE

Live co-create sessions with AI saves time

Instead of separating discovery, design, and development, a live cocreation sessions with AI and can make a big difference.

Solita's team co-created a feature with business users and AI in a single afternoon, eliminating two weeks of back-and-forth. Read more.

100 X
FASTER PROTOTYPING

500 X
FASTER DECISION-MAKING

90 %
FEWER MEETINGS

1 DAY
SKILL APPLICATION

> When we stop working in phases and start working together – with AI in the room – something changes. Speed becomes a side effect of clarity. We don't just build faster. We think better, design better, and move together.

MARKO TAIPALE
PRINCIPAL CONSULTANT

5

Governance paves the way towards an antifragile AI

It's time to move from compliance to holistic competence. The deeper we embed AI into our business processes, the more robust our governance must be to create value. Harnessing the true value of AI requires a strategic approach to AI governance, which includes defining and implementing processes, practices and responsibilities that build antifragile foundations for value creation with AI.

Leading organisations gain their competitive advantage by building strong foundations through compliance and adopting a strategic approach to AI governance.

Compliance with key regulations and standards, such as data management, privacy, security measures and ethics, ensures your AI rests on an antifragile foundation. EU's AI Act lays out requirements for risk-based governance, especially for systems that impact health, safety, or fundamental rights. Integrating requirements into existing processes makes governance an intuitive part of high-quality AI implementation.

When the foundation is in place, it's time to get strategic. Implementing a balanced steering model reduces uncertainty around responsibilities and enhances synergies between innovation and governance. Go beyond compliance and co-create governance processes with product owners and developers, as it builds trust and makes the processes work for you, not against you. Managing your AI assets, who owns them, and where the risks lie provides visibility ensuring that your resources are used strategically.

Ultimately, AI governance is about creating lasting impact that's guided by continuous reflection on what kind of value we want to create with AI and how we get there. When ethics, strategy and innovation work hand in hand, governance becomes your competitive advantage.

> Robust AI governance is one of the key factors for competitive advantage. Turning compliance into competence builds antifragile AI business that delivers value beyond AI hype.

SALLA WESTERSTRAND
AI DESIGNER

5

Your AI is as good as your data

In 2025, competitive AI isn't about bigger models. It's about instantly piping the right, permission-checked data from mail, chats and drives into every prompt. Bigger models won't save you. True enterprise AI happens when you inject the precise slice of your emails, chats and docs into the model at the exact moment of need.

A model without data is just an expensive autocomplete. Give it the procurement email, the Teams DM, and the forgotten slide deck, and it performs. Starve it, and it hallucinates. When a model is given the data, it needs to complete its task, that's called context.

Research consistently shows that output quality follows the data, not clever wording. Zhu et al. (2024) confirm that rich context wins. Google (2025) links factuality to retrieval depth. MIT's Lost in the Middle study shows that hidden information is often skipped. Prompt tricks are just seasoning; context is the main course.

To address this, organisations need a context pipeline: a system that continuously ingests emails, chats, documents, and tickets into a permission-aware semantic index. An orchestrator then selects only what matters, removes PII, and provides source citations.

Looking ahead, ContextOps will emerge as the new DevOps. Ingestion, indexing, and governance will take center stage, while OS-level context buses and offline caches will become more important than simply scaling up model size.

Five key lessons to keep in mind:

1. **Relevance beats token count.**
2. **Summaries and tags outperform raw dumps.**
3. **Embeddings are regulated code, version them and audit.**
4. **Cache Q&A pairs or burn GPU cash.**
5. **Row-level ACLs transform AI from a liability into an asset.**

> In AI, prompt tricks are garnish; context data is the main course. Teams that pipeline, govern, and cache their knowledge will outrun those chasing ever-bigger models – transforming a pricey autocomplete into a trusted colleague.

JOHN TACKMAN
PRODUCT OWNER, GENAI STUDIO

EMBEDDED INTELLIGENCE - AI EVERYWHERE, FOR EVERYONE

Key takeaways

1

Big opportunities come with big risks

Creating agentic networks has huge business upsides, but also comes with several risks around security, compliance, business value, ethics, and cost. An experienced partner knows both AI and software engineering helping you to tackle what's ahead.

2

Business design to support adaptive, AI infused systems

To get real value from AI investments and unlock the transformative power, businesses must thrive in complexity, respond faster to disruption, and innovate around AI - not just with it. Businesses must shift from fixed plans to flexible, learning-driven models, design system-level experiences, rethink KPIs around adaptability, and build hybrid teams to co-create. The organisations that embrace system-level business design will be best positioned to shape markets rather than chase them.

3

Upskill your teams in AI prompting and orchestration

Treat prompt engineering and AI reasoning as core competencies. Invest in training that goes beyond tool use and focuses on how to collaborate with AI in context. Example: Junior team members can become productive on day one through prompt-based workflows, role rotation, and AI support.

4 TECH VENDOR (R)EVOLUTION

Tech vendors are forming new kinds of ecosystems, especially around business solutions. For example, Microsoft and Salesforce are building even more comprehensive ecosystems glued together with AI. Vendors are building composable & reusable assets, platforms and accelerators to help speed up the development.

KEY TOPICS

1. **Platforms and accelerators are a fast track to value**
2. **Rise of vendor ecosystems reshapes cloud and data strategies**
3. **Cloud growth is driven by 5 key factors**

1

Platforms and accelerators are a fast track to value

Independent software vendors (ISVs) and hyper-scalers are forming domainspecific ecosystems that offer composability for building business capabilities. They do this without constraints of closed monolithic approaches or complexity of tailored implementation. These industry clouds enable faster time-to-value, while AI-enabled automation is becoming the glue that keeps pieces together.

The IT landscape is shifting as ISVs and hyperscalers build loosely coupled industry clouds around specific business needs. Large ISVs or cloud vendors now do more than just sell software. They shape and curate partner, tool and content ecosystems that address industry-specific needs with composability and interoperability.

While these ecosystems are initially driven by commercial interests, we're beginning to see deeper technical collaboration – APIs, data sharing, foundation models, integrated business logic, and even connectors for agentic AI.

Together, they promise to reduce complexity and improve modularity, better interoperability, and relief from bespoken application development with faster time-to-value.

Perhaps AI is becoming the "nervous system" of industry cloud ecosystems? Emerging components like knowledge graphs, AI agent integration, orchestration and observability frameworks probably complement application integration, interoperability and enable process automation in industry clouds – shaping the way how composable systems work as whole.

> AI is becoming the connective tissue of composable ecosystems and industry clouds, bridging modular business logic, legacy systems, and new platform layers to orchestrate intelligent outcomes at speed and scale.

ANTTI HAANPÄÄ
HEAD OF INDUSTRIAL

2

Rise of vendor ecosystems reshapes cloud and data strategies

Cloud and data strategies need to evolve as vendor ecosystems are becoming more open, AI-native and their solutions industry-specific. This forces enterprises to choose ecosystems that best fits their use case, not just technological fit, with carefully deciding on an architecture that supports open standards with security and governance at the core. If done well, these platforms become gateways to AI-driven internal innovation.

Cloud and data ecosystem evolution is reshaping how enterprises evaluate, procure, and implement technology. Platform providers, including hyper-scalers such as AWS, Azure, and GCP, and data-centric platforms such as Databricks, Snowflake and Salesforce, are evolving into AI-native platforms, supporting everything from foundation model orchestration and low-code/no-code tooling to accelerators for industry-specific GenAI and Agentic AI use cases.

To remain competitive, these platforms are embracing open-source frameworks, API-centric architectures, and marketplaces that enable rapid onboarding of tools, integrations, and AI capabilities.

For enterprises, the key strategic challenge is to align with ecosystems that best support their use case and AI roadmap, balancing innovation agility, cost transparency, and architectural flexibility. Rather than choosing a single vendor, organisations should design ecosystem-centric architectures that allow them to plug into the right tools, partners, and platforms at each stage of their cloud, data, and AI journey.

> Choosing a technology vendor used to be a technology decision, now it's a strategic bet on the ecosystem that will shape your AI future.

BART SCHROOTEN
TECHNOLOGY PARTNERSHIP MANAGER

3

Cloud growth is driven by 5 key factors

The attractiveness of the cloud remains high, but harnessing its benefits has proved complicated. We see that the main trends to describe cloud demand should be addressed from five perspectives: sovereignty, portability, AI platforms, hybrid scenarios, and realistic expectations. Additionally, the available time required for cloud adoption has decreased, increasing the demand for talented experts and good collaboration between technical and business-minded people.

> " Poor planning and quick wins are a very rare combination. Collaboration between technical and businesspeople is crucial when building the foundation that enables reaching sustainable cloud benefits in the long run and in a secure way.

TERO PELTOLA
CLOUD ADVISOR

The annual cloud growth rate continues to be on high level in the future.
The five most interesting factors driving this demand are:

1 Sovereignty

The need to fully control data has risen due to global uncertainties. We see increased demand for sovereignty solutions as an outcome of updated risk and mitigation plans. Sovereignty also extends beyond data access to include aspects like datacenter electricity access.

2 Portability

The demand for multi-cloud is strong. Portable applications can be transferred quickly from vendor or platform to another. Activities that decrease vendor-lock to specific cloud providers often result in cost increases due to more demanding multi-cloud design and operation.

3 AI platform

There are no indications that the growth rate for AI-related IaaS services will decrease. Cloud is the foundation for AI solutions. More effective language models are being introduced, and the speed and resource requirements for AI model training will be relaxed. However, AI-related cloud spending will increase overall due to increased demand for pre-tuning existing models, licensing, etc.

4 Hybrid scenarios

Cloud is the answer in many, but not all, situations. A lot of data is and will be stored in on-premises servers. Furthermore, edge solutions are linked to these systems. In hybrid scenarios, various complex environments must collaborate seamlessly. Ensuring that networks and integrations are secure and reliable is crucial. This collaboration and security directly impact cloud spending.

5 Realistic expectations

We have witnessed an increase in awareness that cloud adoption will not automatically result in cost reduction. We have a positive mindset as the importance of planning and linking expectations to the modernisation roadmap is expected to guide the cloudification journey of organisations. Modernisation introduces not only more spend but also future-proof solutions.

TECH VENDOR (R)EVOLUTION

Key takeaways

1

ISVs are becoming ecosystem orchestrators

Large ISVs or cloud vendors no longer just sell software. They shape and curate ecosystems of partners, tools, and content that address industry specific needs with composability and interoperability.

2

Rethink procurement strategy

Shift evaluation criteria from features and cost to business outcomes, adaptability, and long-term impact. Explore co-creation with vendors and integrators emphasising flexibility and joint innovation. Evaluate technology platforms not just by capabilities, but by how well their ecosystems, partners, integrations, and marketplaces align with your use cases, innovation and AI roadmap.

3

Re-evaluate vendor selection

The rise of Agentic AI will spur vendors to develop domain and industry specific capabilities. Seek partners who support open architectures, have experience with both agent-based systems and data integration, data management, governance and change management.

5 HARDWARE'S COMEBACK

Previously, the era of digitalisation and cloudification was not interested in hardware. The rise of AI has changed this: solutions now depend heavily on processing power and data centres – and eventually, quantum computing. Additionally, the convergence of physical and digital worlds is reshaping the landscape. Real-time physical solutions require sensor fusion, edge computing, and more.

KEY TOPICS

1. **Boundaries of physical and digital are blurring**
2. **Infrastructure vendors unlock the AI ecosystem**

1

Boundaries of physical and digital are blurring

Data is everything, and AI at the edge is reshaping industries from retail and agriculture to healthcare. By embedding AI into edge devices, companies gain instant insights, driving efficiency, resilience, and innovation. Digital twins simplify device management, testing, and operational visibility, while advanced hardware platforms support reliable, sustainable hybrid architectures, enabling businesses to thrive in an increasingly autonomous future.

Around eleven years ago, Amazon introduced Lambda, marking the start of serverless computing and accelerating cloud adoption. Businesses moved away from monolithic systems toward distributed microservices, gaining scalability, modularity, and abstraction from hardware. But with the rise of AI, hardware is back. The growing need for computing power and real-time data processing is pushing intelligence closer to where data is generated.

What's changing now is the convergence of digital and physical systems. From retail to healthcare, companies embed intelligence into physical environments using edge devices, sensors, and digital twins. Powerful edge computing technologies enhance real-time responsiveness, reduce cloud dependency, and maintain competitive advantages in an increasingly autonomous digital landscape.

Rapid adoption of generative AI further accelerates this evolution, encouraging industries to adopt hybrid cloud-edge architectures that bring cost efficiency, predictive maintenance, optimised resource management, centralised fleet updates, and seamless integration with legacy systems.

> " Edge AI is no longer optional, it's foundational. By bringing intelligence closer to where data is created, industries gain real-time agility, resilience, and the competitive edge needed in a rapidly autonomous world.

RODOLFO PEDRAZA
BUSINESS DEVELOPMENT MANAGER, INTELLIGENT DEVICES

2

Infrastructure vendors unlock the AI ecosystem

> Infrastructure vendors are no longer just suppliers. Today, they play an important role in the AI ecosystem by helping power its growth and evolution. By developing specialised solutions and forming strategic partnerships with key technology players, these vendors are actively in the middle of shaping the future of AI.

EMILY GERMANN
SALES EXCELLENCE LEAD, GENAI STUDIO

Infrastructure vendors are critical ecosystem players in AI because the future of AI depends on the infrastructure behind it. Advanced compute, next-gen data centres, and edge computing solutions are what's helping to bring digital and physical worlds together. As quantum computing moves from theory to reality, infrastructure vendors will be the ones unlocking the next game changing AI capabilities. They will be solving problems that we once thought impossible and demonstrating their place as a key part of the AI ecosystem.

Today, infrastructure vendors are no longer just suppliers of hardware. They've become important strategic partners in the AI ecosystem. Their hardware, systems and integrated solutions now sit at the core of training, deploying and scaling of AI models. As AI advances, the need is rising for a purpose-built and dynamic infrastructure stack that can meet increasing demands.

Driving this shift is the growing complexity and scale of today's AI systems which now require massive amounts of computing power and storage to run effectively. Whether it's advanced chips and GPUs, massive data centres or edge computing platforms, strong infrastructure is the foundation that makes AI progress possible. Infrastructure vendors are no longer just shipping hardware; they are building integrated environments designed to work with leading AI frameworks and tools. Additionally, the rise of AI factories and high-performance compute infrastructure further validates their growing role as innovation enablers.

This change is also accelerating strategic partnerships aimed at expanding infrastructure capacity and capability. Take Cisco's move to join the AI Infrastructure Partnership alongside BlackRock, Global Infrastructure Partners, MGX, Microsoft, NVIDIA and xAI. These collaborations are not just about bringing together resources. Instead, they are about driving real technological progress. Moves like this are clear signs of a broader shift where infrastructure vendors are stepping from the backround and taking a more central role in shaping the future of AI.

HARDWARE'S COMEBACK

Key takeaways

1

AI let's you transform your edge capabilities

Generative AI encourages industries to adopt hybrid cloud-edge architectures that bring all kinds of benefits. AIpowered edge computing delivers immediate, actionable insights, accelerating decision-making, productivity, and responsiveness across industries.

2

Focus on infrastructure in your AI strategy

Before launching or scaling any AI initiative, evaluate the compute, storage and network capabilities of the infrastructure. It is also important to understand how well your systems can integrate with modern, AI-optimised solutions from multiple vendors.

3

Prioritise ecosystem integration

Choose infrastructure vendors who have experience supporting AI projects in your business context and ensure they have compatibility with leading AI frameworks, tools and accelerators.

6 GEOPOLITICS SHAPE TECH

There are two major political trends shaping the tech markets in Europe: geopolitics and protectionism are driving organisations to seek less risky alternatives for US & Chinese solutions, whereas the EU is introducing an array of legislation to mitigate the risks of new tech for individuals and businesses.

KEY TOPICS

1. **Global uncertainties drive European solutions**
2. **EU pushes embedding sustainability into core operations**

1

Global uncertainties drive European solutions

> We're witnessing a decisive shift in Europe's tech posture from reactive to strategic. Protectionism isn't about closing off but about building up. Now's the time to act: to strengthen our own capabilities, foster innovation, and create modern, resilient solutions that reflect European values and priorities.

LISE BACH VESTERGAARD
SVP, SALES

Geopolitical tensions and rising concerns over data privacy are reshaping technology decisions across Europe. As trust in global platforms is questioned, public and private organisations are reassessing dependencies, and shifting toward European cloud, software, and even onpremise solutions to safeguard critical infrastructure. While gaps remain in local tech capabilities, the drive for strategic autonomy is accelerating, fuelled by EU funding and growing demand for secure, homegrown alternatives. This marks a turning point for Europe to strengthen its digital resilience and reclaim control over its technological future.

By nature, technology is global and doesn't follow country or continental borders. However, recent geopolitical disturbances and even conflicts have raised a lot of concerns regarding cybersecurity and data privacy of dominant tech platforms. Can a European public organisation rely on a US or Chinese supplier to maintain critical services and protect data?

For example, in Denmark, many public and private organisations have woken up to these risks and are seeking European software and cloud partners to address them in a proactive way. Some of them are even shifting their focus back on on-premise installations instead of cloud, to match the security requirements in the future.

Unfortunately, in many areas European alternatives are lagging years behind – the infrastructure layer is there but many of the critical services are in their infancy or missing completely. This would require a huge upfront investment from the customers. On the other hand, it may open a new boost for the European tech community.

At the same time, the European Union is ramping up funding to boost strategic autonomy in critical technologies, including defence capabilities. Through initiatives like the European Defence Fund (EDF), substantial investments are being directed toward developing homegrown technological solutions that strengthen Europe's resilience and reduce dependency on external actors.

2

EU pushes embedding sustainability into core operations

The impacts of climate change are already here, and it´s already transforming global economies and industries today. Transparency and traceability are now essential for managing risks, meeting regulation and driving real change. EU Green Deal pushes companies to act, but true leadership comes from going beyond compliance.

The global marketplace is becoming increasingly fragmented due to protectionist actions by major economic regions. Simultaneously, EU regulations like CSRD, EUDR, and ESPR demand verifiable data on environmental and social impacts across supply chains. This push for value chain transparency places stricter requirements for product, production, and customer data. The most significant digital leaps are expected in resource-intensive sectors like construction and in manufacturing with complex supply chains.

To stay competitive, companies must embed sustainability into core operations, from procurement to production. Tools exist, but strategic commitment is key. Proactive companies use regulation to drive innovation, efficiency and trust.

Artificial intelligence can accelerate sustainability efforts by enabling better forecasting, optimization and risk detection, but it also introduces new ESG questions related to energy use, ethics and transparency.

Compliance is increasingly a prerequisite for market access. Those investing in traceability gain advantages: green premiums, customer loyalty, sustainable finance, and preferred status. In a post-greenwashing world, credible data is the new proof of responsibility.

> " Sustainability regulations set the direction, but it's collaboration within and between companies that brings them to life, creating impact greater than compliance alone.

ELISA SUVANTO
SENIOR TRANSFORMATION DESIGNER

GEOPOLITICS SHAPE TECH

Key takeaways

1

Monitor the geopolitical risks of your core solutions

Reassess risks and tech dependencies now: Shifting geopolitics and rising data sovereignty demands call for proactive evaluation of critical systems and suppliers, especially in the public sector.

2

Data is the foundation for trust, innovation and market access

In sectors with complex supply chains, traceability is becoming a condition for doing business. Companies that invest in credible sustainability data gain access to green premiums, financing, and preferred status in partnerships.

3

Regulation sets the pace, but collaboration scales the impact

True transformation happens when companies align internally and across ecosystems. Shared data, goals, and efforts unlock greater sustainability outcomes than regulation alone can achieve driving value for all stakeholders.

SUMMARY

Making sense of the signals: what's next for leaders

The world doesn't need another trend list. It needs actionable interpretation.

At Solita, we believe that true impact happens when insight, design, data, and tech come together to solve real problems. This report has shown how AI and digital technologies are no longer isolated tools. They are shaping the very fabric of operations, public services, commerce, and even national resilience.

Yet success isn't just about technology. It's about choosing the right problems to solve, aligning across silos, and having a partner who understands your strategic context as well as your system architecture.

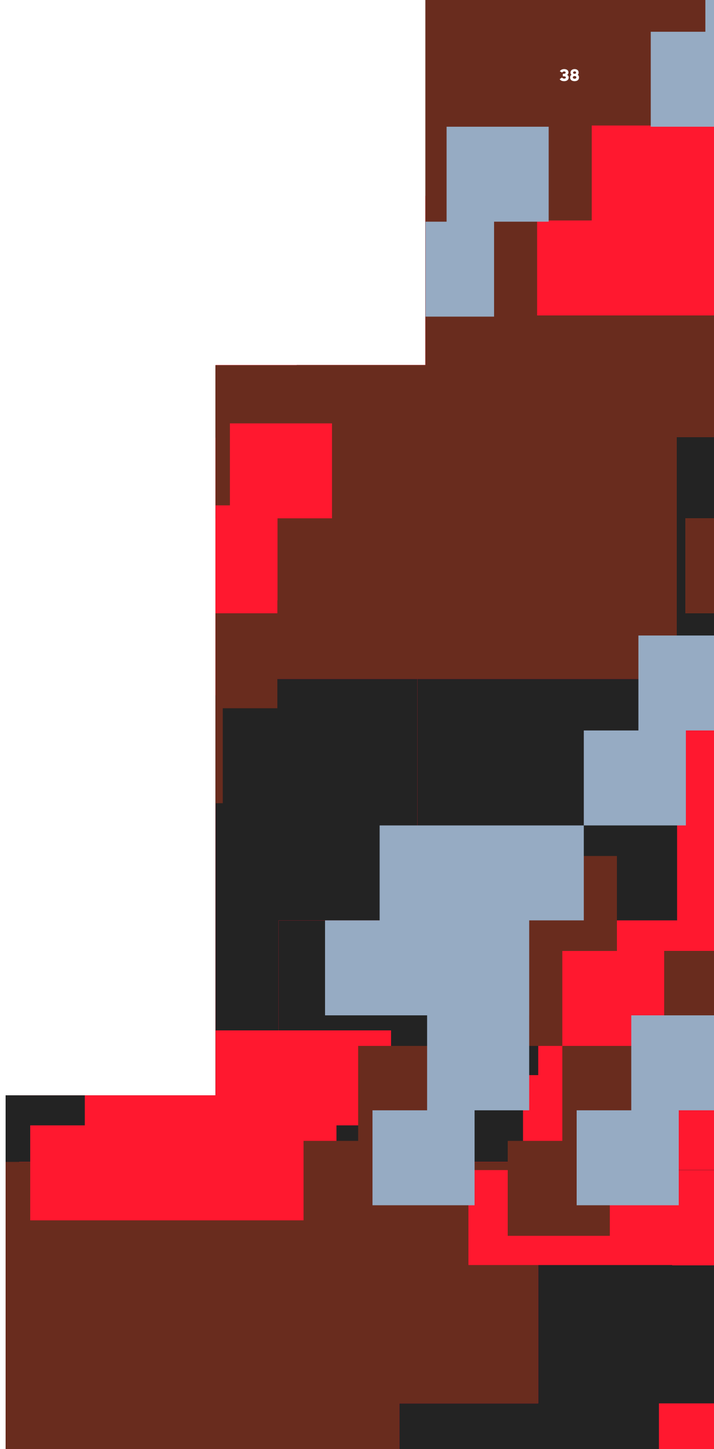
If you are:

- → **Navigating complex tech ecosystems and vendor decisions**
- → **Building AI capabilities beyond pilots**
- → **Working under regulatory or political constraints**
- → **Reimagining citizen services or commercial offerings with AI**
- → **Seeking trusted partners to design, build, and scale responsibly**

...we're here to help.

Solita brings together strategy, human-centric design, top-tier engineering, data mastery, and AI leadership—all under one roof. Let's explore how we can turn today's signals into tomorrow's results, and together create future-proof solutions with lasting impact.

Let's talk.



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Solita is an AI-driven technology, data, and design company dedicated to digital transformation.

Empowering businesses and societies to reinvent themselves, the company focuses on advanced technology, data innovation, and human insight by offering strategic consulting, service design, software development, AI & analytics, and managed cloud services. Established in 1996 and now a vibrant community of over 2,000 forward-thinkers, Solita operates in ten countries: Finland, Sweden, Denmark, Norway, Estonia, Belgium, Poland, Switzerland, Germany, and the UK.

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