Priorities 2026

Realities of, returns on, and the review of AI

Data, what do we do with it?

Powering the future

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Executive Summary

- AI will continue to dominate technology conversations and significant investments will continue throughout 2026 by vendors and enterprise customers alike
- Starting in 2H26, we expect executives and boardrooms to begin questioning the **realities** of AI as it relates go-to-market strategies and examine the **returns** from AI investments
- We anticipate this will result in **reviews** of the viability of existing and future AI projects as organizations plan for CY27 and FY28
- Technology leaders will engage in analyses and assessments of long-term strategies on how to manage data platforms, placement, presentation, protection, retention, and governance
- We predict that concerned stakeholders and shareholders will seek to understand the environmental impact of powering and cooling the logarithmic growth of datacenters to support new, emerging, and sustaining technologies that require substantial processor and data infrastructures

Themes for 2026

2026 will be dominated by three themes:

- **Realities of, returns on, and the review of AI**
  - Has the disruption of AI-fication paid off?
- **Data, data, data – how do we deal with it**
  - Data storage capacity is commoditized, so we no longer consider what we *need* to store, we store data because we can
  - As such, growth rates are not the issue, it's the actual capacity
  - How do we manage and get value from data?
- **Powering the future**
  - How big and how many datacenters do we need to deal with data we generate?
  - What are on-going financial and environmental costs?

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Realities of AI

Technology Vendors

- AI-fication of products and services
  - In many (if not most) cases, “AI” = automation and acceleration
  - Augmented with natural language
- “AI” used to market parity or superiority
  - Prolonging sales cycles
  - Short to medium term, more well-known will benefit – i.e. the devil you know
- In a small number of cases, some vendors are still not sure where to add AI

Enterprise Customers

- Enterprise customers face same challenges as vendors:
  - AI-fication of products and services to market parity or superiority
- Most enterprises still experimenting and piloting AI[1]
- Only 1% of AI projects is fully mature[2]
- Evolution from AI/ML/Data Lake/Hadoop use cases

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ROI of AI

Technology Vendors

- What is the ROI from investments in AI-fying existing products and services?
- How many vendors can attribute direct increases in sales due to AI-fication?
- Has AI increased competitive advantage?

Enterprise customers

- AI spending will reach $2T in 2026[5]
- AI infrastructure spending will exceed US$ 400 B in 2026[3,4]
- <5% of EBIT attributable to AI use[1]
- 95% of GenAI pilots get 0% return[6]

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Review of AI

Technology Vendors

- Cannot stop investing in AI-fying or AI-fication to sustain competitiveness
- Go beyond automation, unification (single pane), and accelerated natural language search
- Consider using AI to advise customers of partners that improve experience

Enterprise customers

- Like vendors, cannot stop investing in AI-fying or AI-fication to sustain competitiveness
- Deploy AI for internal operations to accelerate and improve accuracy of quantifiable analyses
- Avoid use of AI for customer facing activities where creativity and/or critical thinking required

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Data, what do we do with it?

- In 2026, 250 ZB of new data forecasted to be generated[10]
  - By 2028, nearly 400 ZB of new data
- Roughly 4% (16 ZB) will reside in the global installed base of stored capacity[8]
- Enterprises must consider five key elements of data management:
  - Data platform (SaaS, PaaS, IaaS)
  - Data placement (in-cloud, on-premises, hybrid, geography)
  - Data presentation (block, file, object, metadata)
  - Data protection (short- and long-term retention, security, etc.)
  - Data governance (corporate governance, regulatory compliance, etc.)

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Powering the future

- Datacenter consumption of electricity is expected to exceed Japan's total electricity consumption by 2030
- Powering datacenters, especially due to growth in data stored, will begin to be a focused element in Environmental, Social, and Governance (ESG) reports
- Shareholders and interested stakeholders (political, economic, and environmental) will also question the real, perceived, and reputational aspects related to emissions, energy consumption, and energy alternatives
- Technology vendors have already started to highlight energy savings as a competitive advantage, enterprises must also include environmental factors in their evaluation process of technology acquisitions

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Thank you!

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