

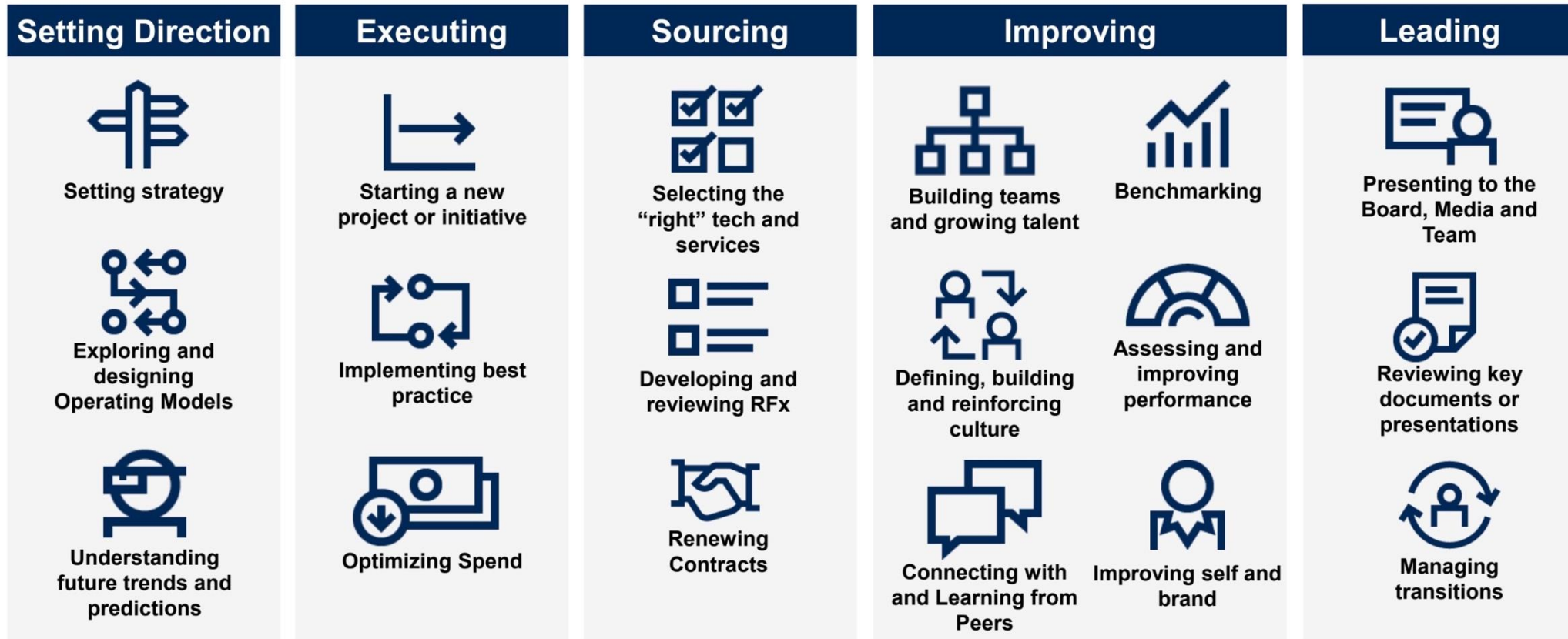
# IT Predictions and Trends

Highlights from Symposium/Xpo™ EMEA

Hynek Bury, Vaclav Spana  
Gartner Executive partners

25.12.2024

# Make Gartner Your “First Call” when .....



**Making Gartner relevant at every decision point...**

# What we will talk about

- Predictions
- Trends
- AI

# **Top Strategic Predictions for 2025 & Beyond: Riding the AI Whirlwind**

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# Top 10 Strategic Predictions for 2025 and Beyond

<b>Digital humans</b>	<b>Mental health</b>	<b>Agreements</b>	<b>Motivation</b>	<b>Brands</b>
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<b>25%</b> malicious actors	<b>40%</b> demand guardian agents	<b>\$500B</b> to microgrids	<b>20%</b> use AI to de-layer management	<b>10%</b> challenge executive decisions
2028	2028	2027	2026	2029

Source: Gartner

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1

The whirlwind challenges our privacy and personas.

2

Operational risks are at the heart of the whirlwind.

3

The whirlwind threatens management structure.

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**What if your organization  
demands to license your persona  
as a corporate asset?**





# 1 **The Corporate LLM Wants Your Persona**

By 2027, 70% of new contracts for employees will include licensing and fair usage clauses for AI representations of their personas.

— *Ryan McKinney*

## Licensing of Individual Personas

- Likeness, style and personality.
- Legal ownership challenges.
- Licensing clauses are a partial solution.

➔ **Demand royalties for use after tenure!**

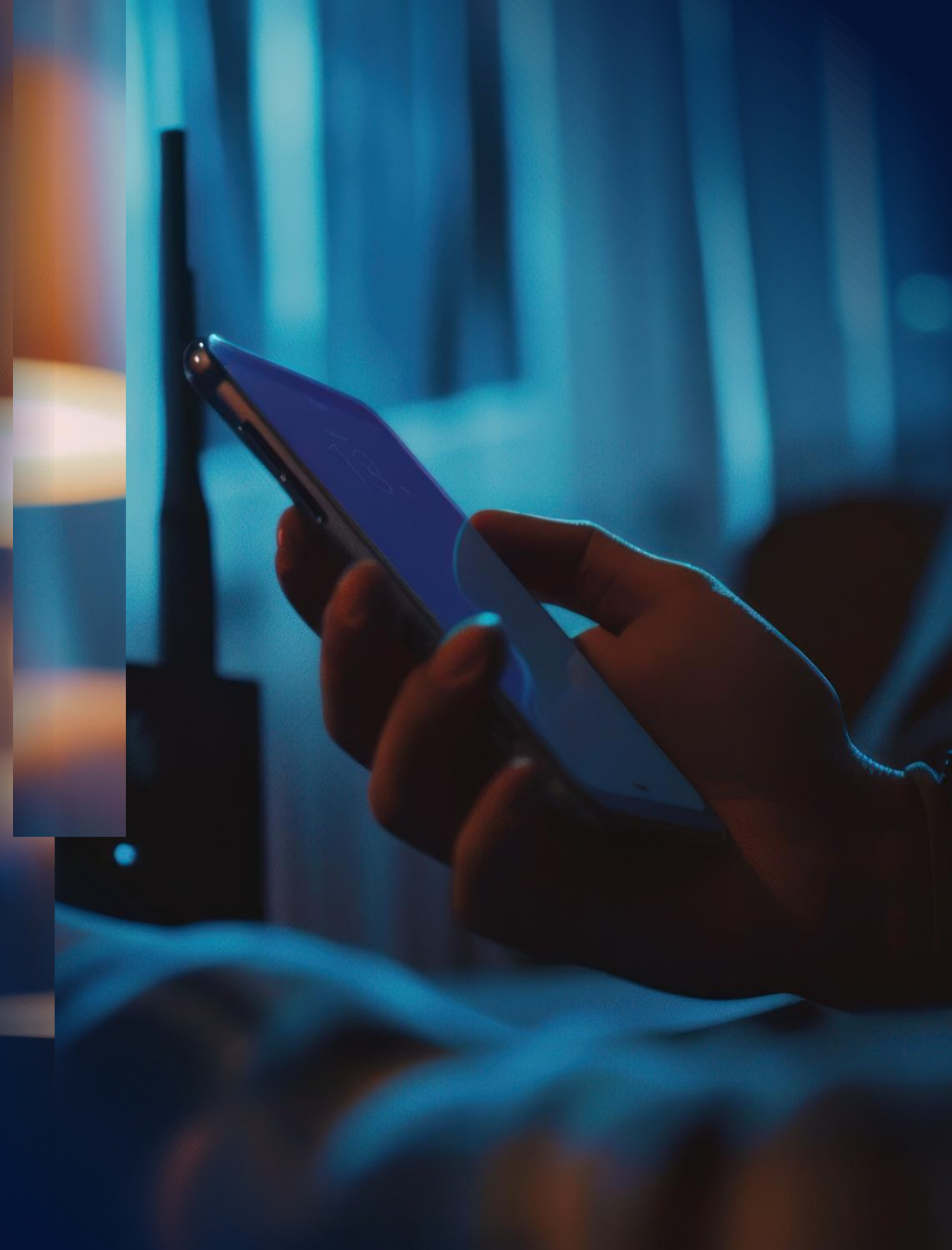


**What if AI addiction is exponentially worse than digital addiction?**

## 2 Organizations Adopt Antidigital Policies

By 2028, technological immersion will impact populations with digital addiction and social isolation, prompting 70% of organizations to implement antidigital policies.

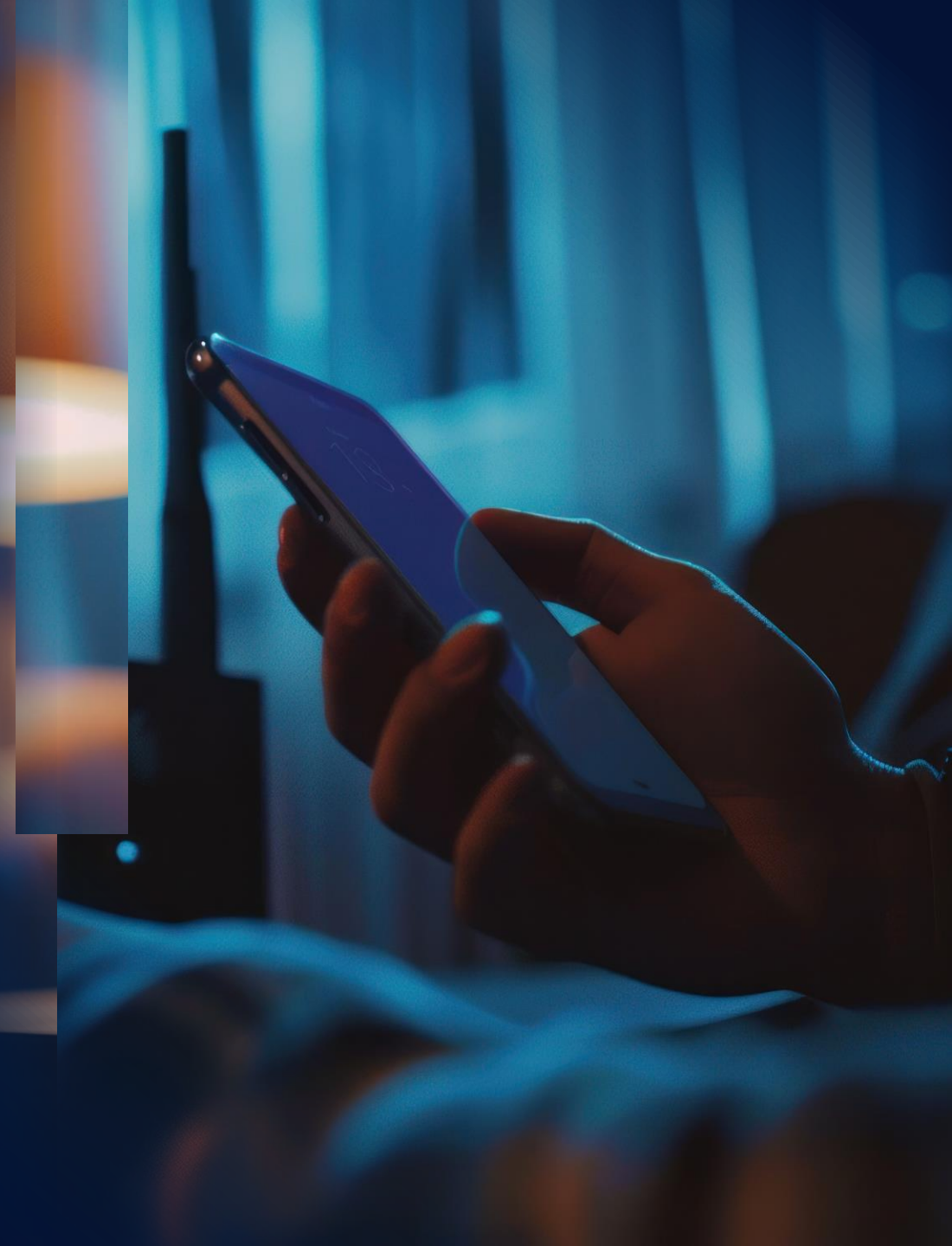
— *Danny Kreidy*



## **Adopt Antidigital Policies**

- New digital detox **timeouts**.
- Employee assistance programs manage digital addiction.
- Face-to-face interactions become more valuable.

➔ **Beware of a generational shift in perspective!**



**What if you could sue your  
healthcare provider because AI  
didn't catch your depression?**

# 3 Unregulated Emotional AI Harms Financial Health!

By 2027, 70% of healthcare providers will include emotional-AI-related terms and conditions in technology contracts or risk billions in financial harm.

— Victoria Rowan



# Emotional AI Makes the Difference

- Patients expect empathy and clinicians face burnout.
- Emotional AI facilitates clinician-patient interaction.
- Lack of emotional AI harms patient outcomes.

➔ **Prepare for high-value financial claims.**





**What if *AI psyops* are used on workers and patients to manipulate their moods and experiences for profit?**

# 4 Nudge Employees With Persuasive Analytics

By 2028, 40% of large enterprises will deploy AI to manipulate and measure employee moods and behaviors, all in the name of profit.

— Deepak Seth



# AI Drives Moods and Behaviors

- Behavioral nudges drive positive behaviors and productivity.
- Erosion of trust and increased turnover.
- Legal and ethical risks increase.
- Digital tools provide instant feedback on interactions.

➔ **Use AI analytics to act on key decision-making data.**



**What if your brand becomes  
completely AI-generated?**

# 5 GPT Brands New Business

By 2028, 30% of S&P Global's companies will use GenAI labeling, such as “xxGPT,” to reshape their branding while chasing new revenue.

— *Julian Sun*



# GenAI Shapes a New Brand

- Create brands with new revenue streams.
- Shape brands' creatives and ambition with GenAI.
- Adapt brands quickly in changing markets.

➔ **Don't let AI dilute brand differentiation.**



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**What if insider threats increase exponentially as AI agents open a new threat surface?**



## 6 Agents Under Attack

By 2028, 25% of enterprise breaches will be traced back to AI agent abuse from both external and malicious internal actors.

— Avivah Litan and Richard Addiscott



## AI Agent Threats

- Weak ROI for nonspecific GenAI capabilities.
- AI companies heavily promoting enterprise AI agent sales.
- Invisible attack surfaces increasing rapidly with agents.

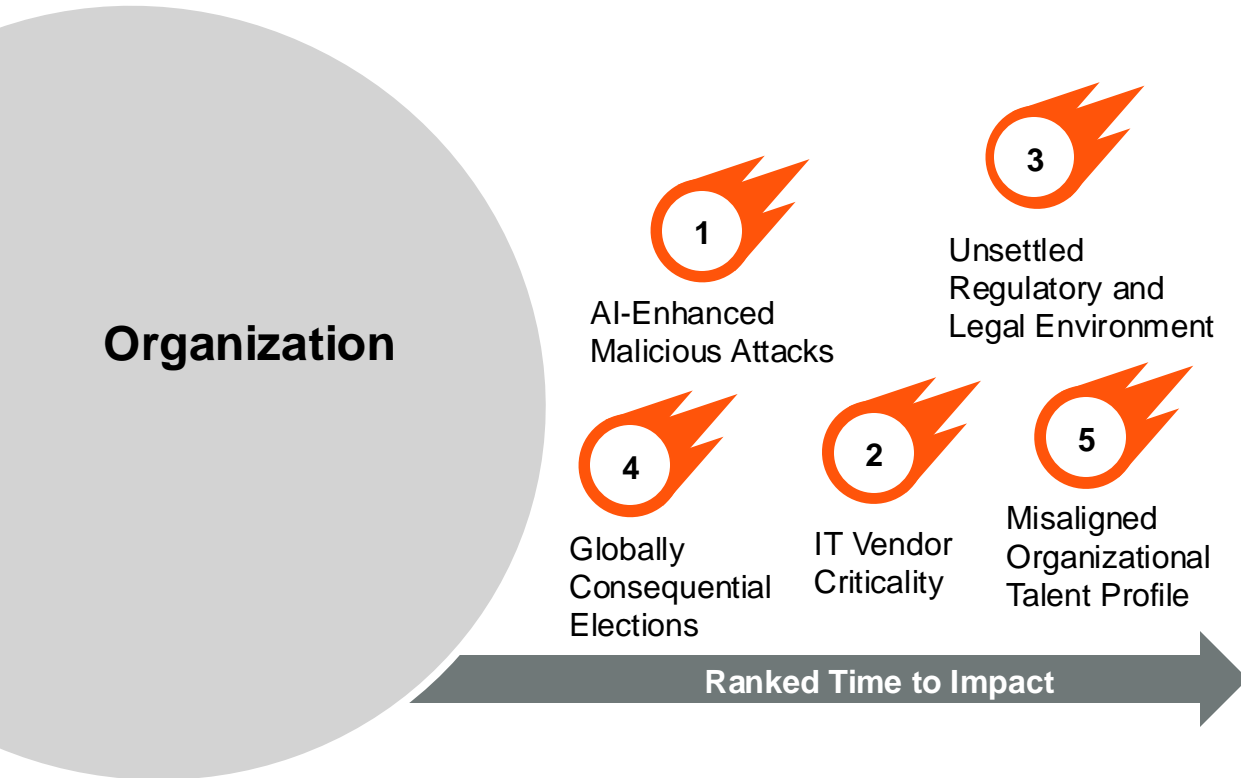
➔ **Don't wait to implement new security and risk solutions.**



# The 3Q24 Risk Meteors

## Top Emerging Risks for 3Q24

By Risk Score<sup>1</sup>



Score Rank	Risk Name	Impact Score	Time Frame Score	Frequency
1	AI-Enhanced Malicious Attacks	3.08	1.57	77%
2	IT Vendor Criticality	3.14	1.68	71%
3	Unsettled Regulatory and Legal Environment	2.91	2.01	75%
4	Globally Consequential Elections	2.70	1.48	59%
5	Misaligned Organizational Talent Profile	2.71	2.19	64%

n = 286

Source: 3Q24 Gartner Emerging Risks Survey

<sup>1</sup>Risk Score = Cube Root (Impact x Inverse Time Frame x Frequency Selected as a Top 10 Emerging Risk Rescaled)

# 7 Guardian Agent Overseers

By 2028, 40% of CIOs will demand **guardian agents** be available to autonomously track, oversee or contain the results of AI agent actions.

— *Daryl Plummer, Leigh McMullen, Avivah Litan and Tom Coshows*



# Humans Cannot Keep Up!

- Agents have agency and will be subverted.
- Agent proliferation outpaces understood risks.
- Guardian agents detect and potentially defend.

➔ **Don't depend on humans-in-the-loop for long.**



**What if providers cannot generate power fast enough or distribute it reliably to ravenous consumers?**

# 8 Bypass the Utility Company

Through 2027, Fortune 500 companies will shift \$500 billion from energy operating expenditure to microgrids, mitigating chronic energy risks and AI demand.

— *Lloyd Jones, Bob Johnson, Sarah Watt and Lauren Wheatley*

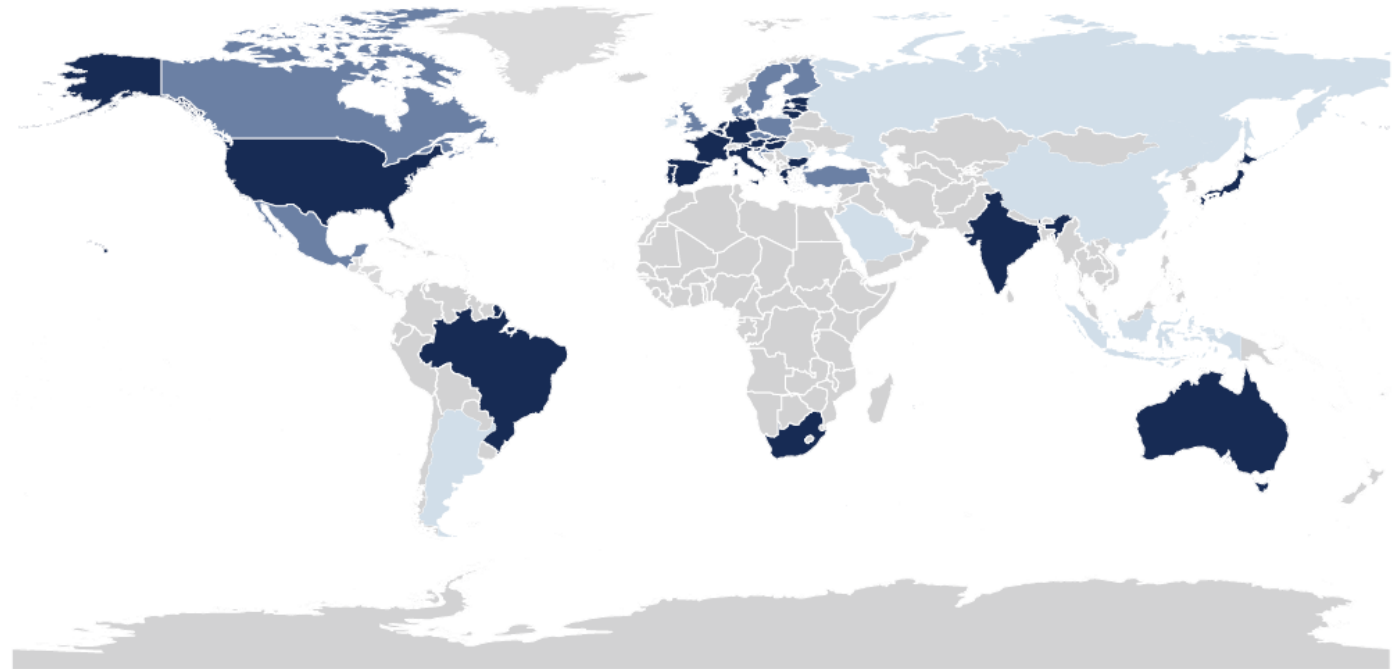


# Predicts 2024: Power and Utilities

By 2026, 50% of G20 will use monthly electricity rationing to manage demand volatility, losing commercial and industrial (C&I) revenue to self-generation.

## Likelihood of Electricity Rationing in G20 Member Countries

High  Low



Source: Gartner

[Predicts 2024: Power and Utilities, Disruption of DERs](#)



# Energize Your Organization

- Rising demand due to electrification and AI.
  - Limited utility energy supplies.
  - Growing backlog for new power stations.
- ➔ **Secure your energy future with self-generation.**



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**What if middle management  
becomes an endangered species?**

## 9 AI Delayers Middle Management

Through 2026, 20% of organizations will use AI to flatten their organizational structure, eliminating more than half of current middle management positions.

— *David Furlonger and Don Scheibenreif*



# Middle Management Shrinks

- Human labor and culture scale poorly.
- AI improves individual and corporate performance.
- Flattening the hierarchy drives flexibility and work-life balance.
- Technology leaders lack training in HR skills.

➔ **Plan to craft employment contracts for machine workers.**



**What if AI **fired** your C-suite?**

# 10 AI Guidance Shifts Decision Making

By 2029, 10% of global boards will use AI guidance to challenge executive decisions that are material to their businesses.

— *Stewart Buchanan, Whit Andrews and Carlton Sapp*



# AI Changes Executive Decisions

- AI decision making becomes board-critical.
- Big firms merge AI, investment and consulting practices.
- Corporate consolidation accelerates.
- Decision data requirements expand significantly.

➔ **We must end the Maverick genius CEO era.**





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# Top Strategic Technology Trends for 2025

# Top Strategic Technology Trends for 2025



## AI imperatives and risks

- Agentic AI
- AI governance platforms
- Disinformation security



## New frontiers of computing

- Postquantum cryptography
- Ambient invisible intelligence
- Energy-efficient computing
- Hybrid computing



## Human-machine synergy

- Spatial computing
- Polyfunctional robots
- Neurological enhancement

Shape the future with responsible innovation

# AI – summary keynote

# You Set Your Pace In Your AI Outcomes Race



## AI Outcomes Race Paces

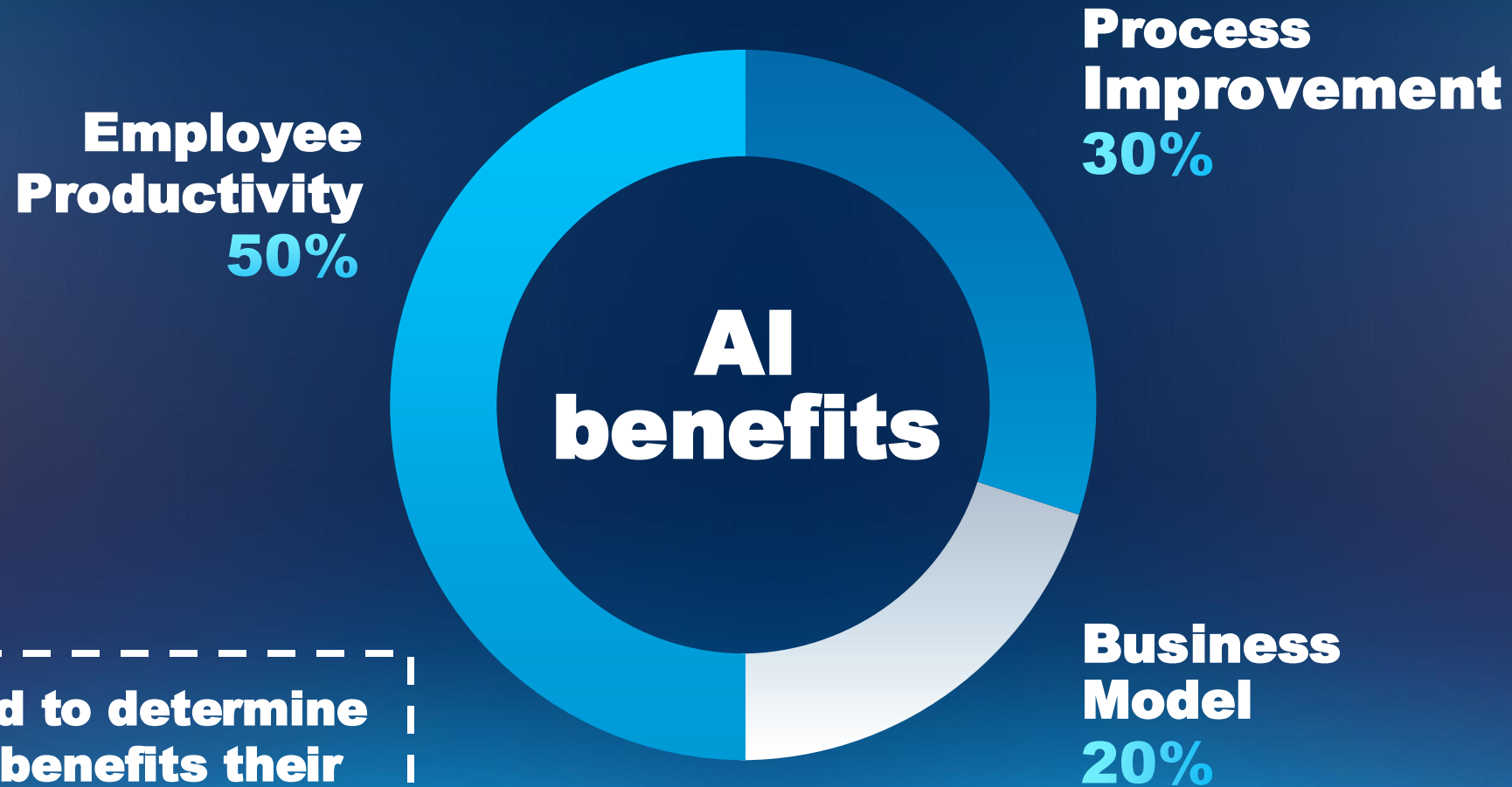
### AI-Steady

- Industry not disrupted by AI
- Modest AI ambition
- < 10 AI initiatives

### AI-Accelerated

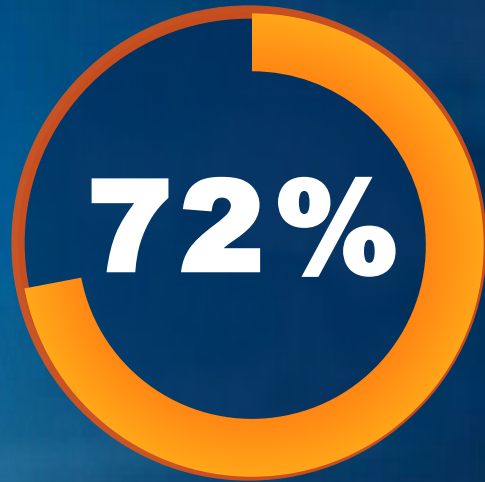
- Industry disrupted by AI
- Aiming to be AI-First
- > 10 AI initiatives

# Achieving AI Business Outcomes Is Hard



**CIOs need to determine what AI benefits their enterprise is looking for.**

# Productivity Gains From GenAI Are Difficult To Achieve and Are Not Equally Distributed Amongst Employees



of IT leaders report that employees struggle to integrate AI into daily work

## GenAI Deep Productivity Zones

Match job complexity and job experience to unlock AI Productivity

**Low job complexity**  
**Low job experience**

**High job complexity**  
**High job experience**

# The Way AI Costs Scale Makes Achieving AI Business Outcomes Even Harder

**Cost estimates for  
GenAI can be off  
by 500% – 1000%**





**You won't move data to AI**  
**AI will go to the data**

**Data Everywhere and Every Kind**

**Embedded AI**

**BYOAI**

**TRiSM**

**Built AI**

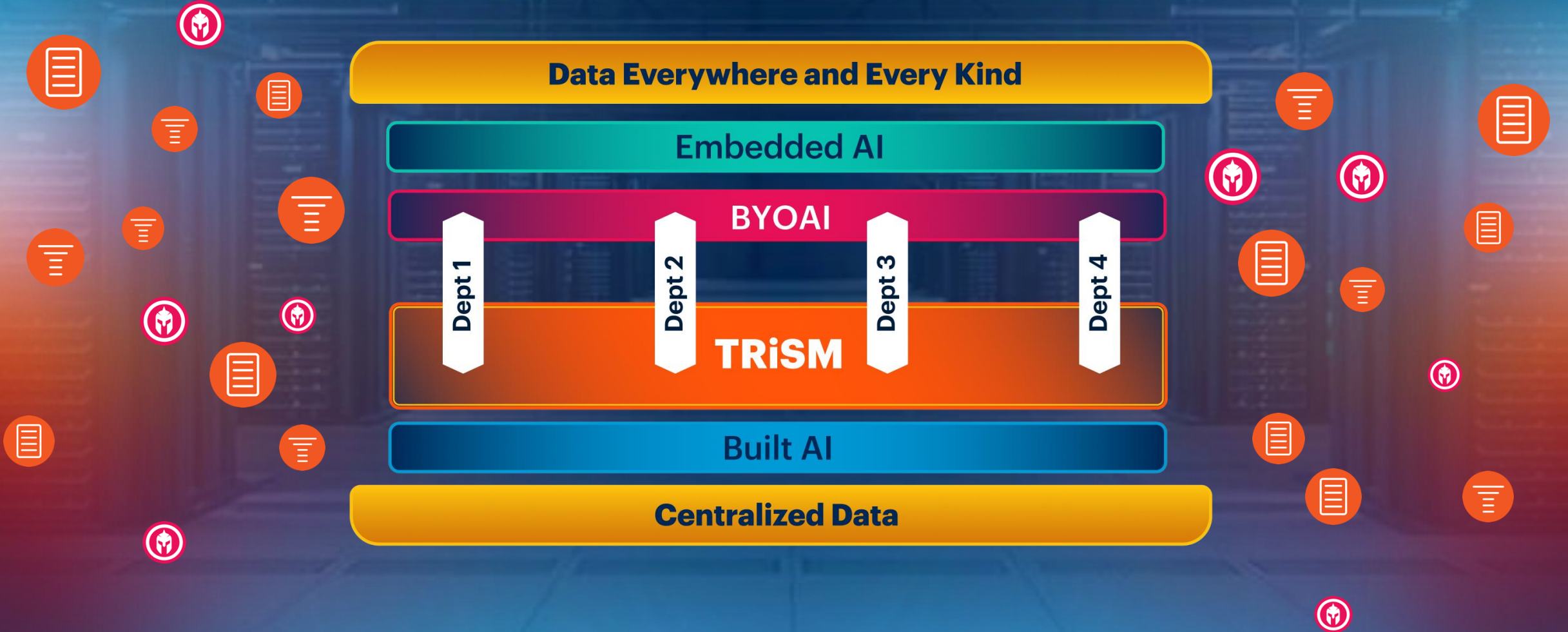
**Centralized Data**

**Dept 1**

**Dept 2**

**Dept 3**

**Dept 4**



# Sources of AI

Data Everywhere and Every Kind

Embedded AI

BYOAI

TRiSM

Built AI

Centralized Data

Dept 1

Dept 2

Dept 3

Dept 4

43%

43% public sector

22%

26% public sector

35%

32% public sector

# Vendor-Packaged Sandwich

**Data Everywhere**

**Embedded AI**

**BYOAI**

**TRiSM**

**Centralized Data**

# Trust-Rich Sandwich

**Data Everywhere**

**Embedded AI**

**BYOAI**

**TRiSM**

**Built AI**

**Centralized Data**

# Deluxe Sandwich

**Data Everywhere**

Embedded AI

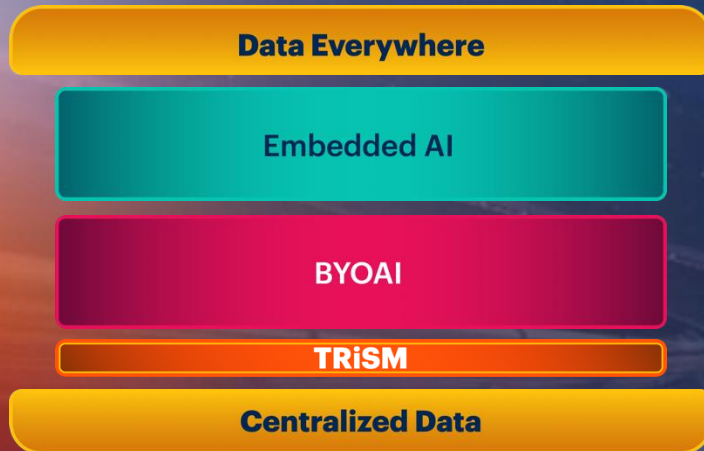
**BYOAI**

**TRiSM**

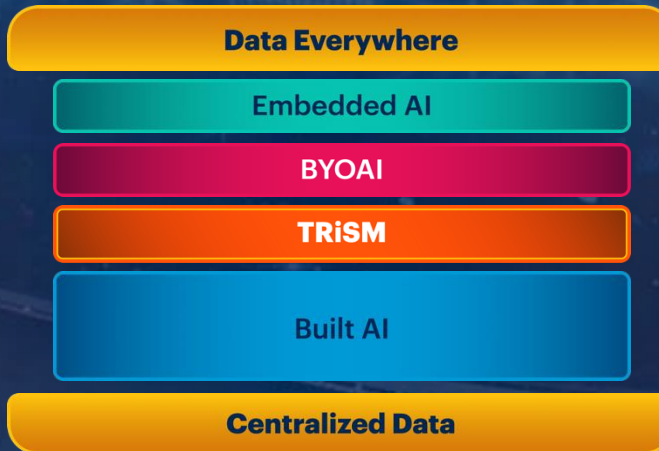
Built AI

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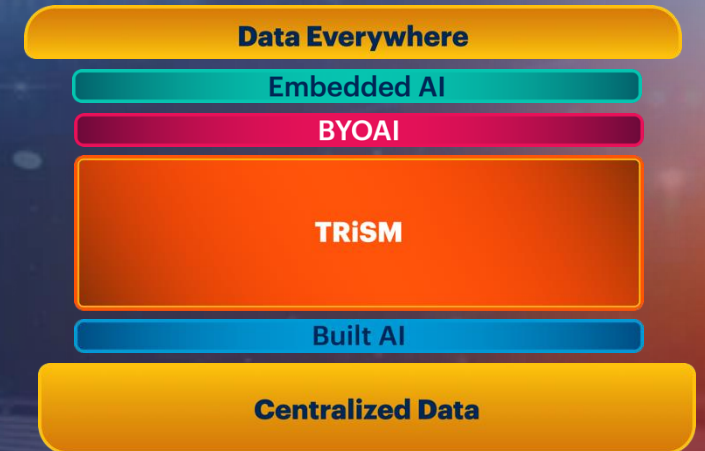
## Vender-Packaged Sandwich



## Deluxe Sandwich



## Trust-Rich Sandwich





Technology Action Item

# Customize your own tech sandwich

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# Q&A

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