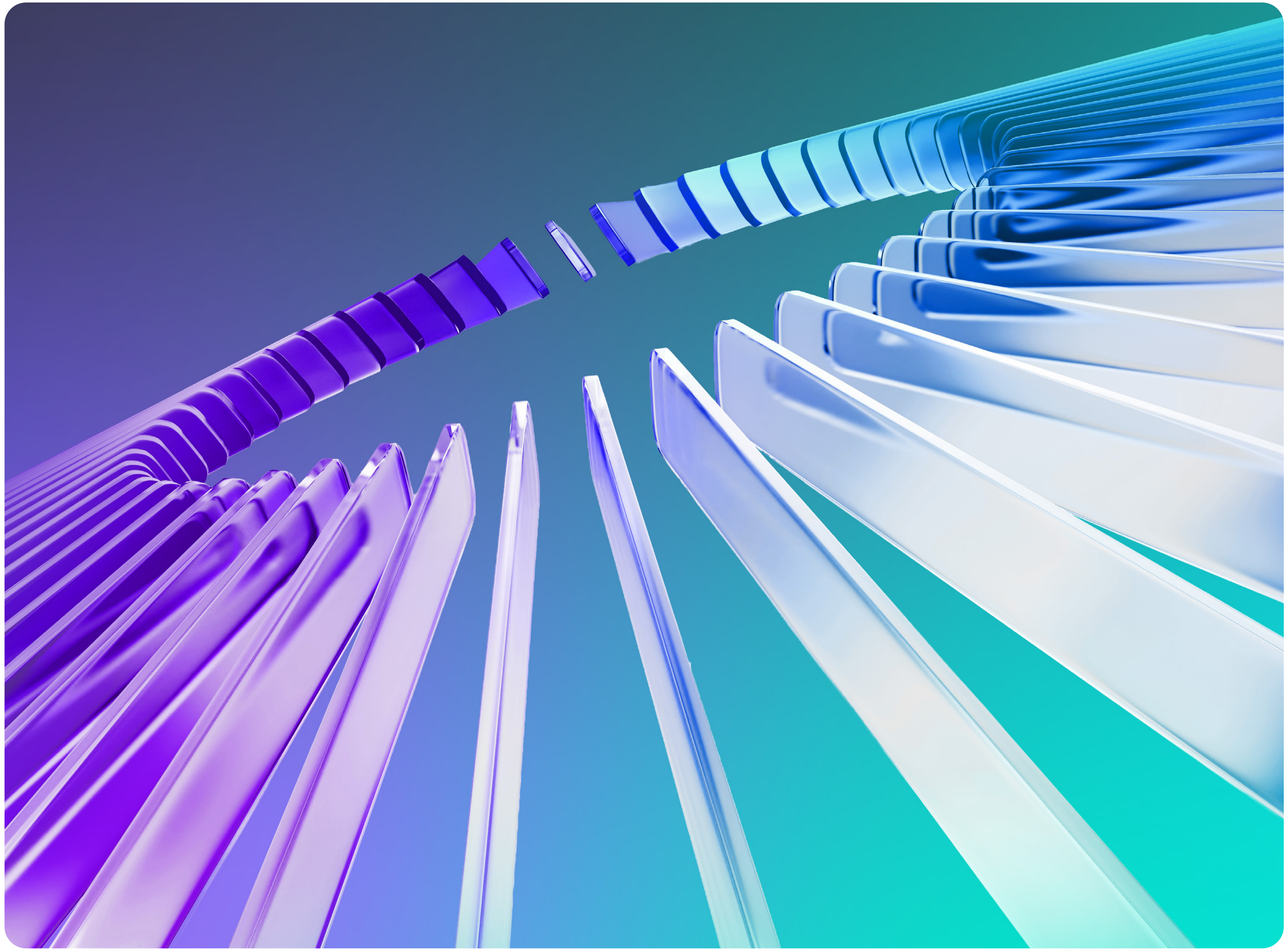
Softtek®

Tech Hot Topics: 2026 Edition

Capabilities built in 2025 define the ability to scale today



In our 2025 Hot Topics report, **we mapped the capabilities that organizations needed to explore to remain resilient** in an environment marked by technological acceleration and growing uncertainty.

Twelve months later, **the context has changed substantially**. Not because new disruptions have necessarily emerged, but because many of the identified capabilities have moved beyond the exploratory stage to become the foundation upon which organizations are building their evolution.

This shift introduces a distinct dynamic: value no longer lies in identifying what to adopt, but in having previously **built the foundations that enable absorbing, integrating, and scaling** new capabilities without friction.

In this regard, organizations that made progress in 2025 have not only reduced their risk exposure but **have also created the conditions necessary to adapt more quickly** to an environment that demands execution, not exploration.

Those that did not now face a more structural gap, where the challenge is not incorporating new capabilities, but recovering the time not invested.

This report starts from that premise: understanding the 2026 Hot Topics not as a breaking point, but as the natural **continuation of a maturation process where prior preparation directly conditions future response capacity**.

Softtek Tech Hot Topics: 2025 vs. 2026

	2025	2026
Artificial Intelligence	• AGI • AGENTIC AI • SLMS Y EDGE AI • OPEN-SOURCE AI	• ORCHESTRATED AGENT ECONOMIES • MULTIMODAL INTELLIGENCE • PHYSICAL AI • DSLMS • AUTONOMOUS DIGITAL TWINS
Data & Software	• AUGMENTED ANALYTICS • REAL-TIME STREAMING • AUGMENTED DEVELOPMENT • SELF-HEALING APP LAYERS	• IDD ENGINEERING • DIGITAL PROVENANCE
Infrastructure	• LOW-LATENCY CLOUD • MULTI-CLOUD STRATEGIES	• INFERENCE ECONOMICS • NEXT-GEN HYBRID COMPUTING • GEOPATRIATION
Customer Experience	• CONVERSACIONAL AI • EMOCIONAL AI • ADAPTIVE INTERFACES	• INTELLIGENT CX • AGENTIC COMMERCE
Design	• PRIVACY BY DESIGN • GENERATIVE INTERACTION BLUEPRINTS • MICRO-INTERACTION DESIGN	• AI-AUGMENTED DESIGN SYSTEMS • TRUST-CENTRIC EXPERIENCE • MULTIMODAL UX DESIGN
Business Innovation	• DIGITAL BUSINESS TWINS • CORPORATE VENTURE BUILDING • COBOTS CON RPO	• AI-NATIVE TRANSFORMATION • AUTONOMOUS SUPPLY NETWORKS • SaS
Cybersecurity	• POST-QUANTUM CRYPTOGRAPHY • PETS • DATA CLEAN ROOMS • SSI	• PREEMPTIVE CYBERSECURITY • NHIS & ZERO TRUST • TOKENIZED ASSET INFRASTRUCTURE
Sustainability	• ENERGY MANAGEMENT AUTOMATION • GREEN CODE	• GREEN AI & COMPUTING • SUSTAINABILITY-AS-A-SERVICE
Workforce & Talent		• FULL-JOURNEY PROCESS AUTOMATION • AI-AUGMENTED WORKFORCE

Global volatility is no longer cyclical, organizations must design for continuous disruption

The global landscape in 2026 is being shaped by a convergence of self-reinforcing tensions, **reconfiguring the strategic and technological priorities of organizations. What emerges from this situation is the industry's direct response to an environment that fragments, hardens, and simultaneously accelerates**.

Uncertainty translates into concrete operational tensions; from disruptions, cost overruns, or loss of control to limitations in value capture, which are forcing organizations to mobilize and redesign both their operating model and their technology decisions. In response, **companies are prioritizing a new generation of capabilities, "hot topics"**, designed to reduce exposure, strengthen control, and enable efficient scaling.

Convergence of global conflicts on multiple fronts

Geopolitical and commercial fragmentation

Tensions, tariffs, and export controls are **reshaping supply chains, forcing entities to design for resilience**

Regulatory pressure and compliance

Different regulatory frameworks are making the environment more stringent and complex, turning **explainability and control into operational requirements**

Computational cost, energy, and sustainability

Scaling AI is an economic and environmental challenge. Companies are forced to **optimize and redesign models and align with ESG**

The gap between adoption and impact

Accelerated adoption over inefficient processes is destroying ROI. **The focus shifts toward redesigning internal operations**

Redefinition of cross-cutting relationships

Brands lose control of the entry point and teams are resized. **The advantage shifts to orchestrating human and digital talent**

Fuentes: EY | Empresa Exterior | WeForum

Hot Topics identify capabilities required to respond to structural pressures in 2026

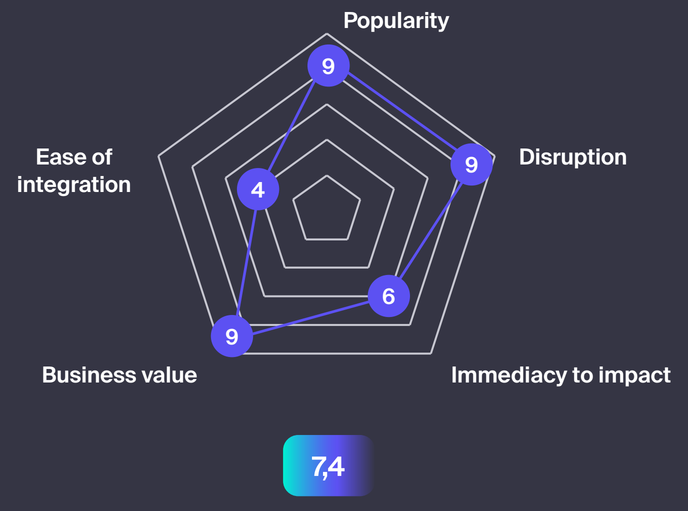
The 25 Hot Topics and the 9 categories

Hot Topics are **technological and organizational capabilities that companies are prioritizing** because they respond to environmental tensions. They are characterized by: **arising from real pressure** (geopolitical, regulatory, economic, operational, or social), **offering a concrete path to address it, and the cost of inaction** is already greater than the cost of integration.

- Artificial Intelligence
- Design
- Data & Software
- Business Innovation
- It Infra-Structure & Cloud
- Cybersecurity
- Customer Experience
- Sustainability
- Workforce & Talent

Key evaluation variables

The **25 main hot topics** are evaluated across the following **5 variables**. From this analysis, **an average rating is obtained, reflecting the strategic relevance and potential** impact of each trend in the industry, facilitating informed decision-making.



Popularity

Measures the recognition and adoption of the trend in the industry and its relevance across various sectors.
High (8-10): Widely recognized with strong investment. Leading organizations already operate it at scale.
Medium (5-7): Gaining traction, but most implementations remain in pilot phase or limited to specific areas.
Low (1-4): Adoption concentrated in specialized sectors or in very early phases without significant operational deployment.

Disruption

Assesses the trend's potential to transform existing systems, business models, and industries.
High (8-10): Causes fundamental changes and can displace current systems.
Medium (5-7): Represents significant innovations, but does not necessarily completely alter existing models.
Low (1-4): Represents incremental improvements without significantly altering sector dynamics.

Immediacy of impact

Measures how quickly the trend generates real and measurable impact in the enterprise.
High (8-10): Immediate impact or within 1-3 years. The technology is already available and its integration produces short-term results.
Medium (5-7): Visible impact in 3-5 years, will have relevant effects in the medium term.
Low (1-4): Requires more than 5-8 years for mass adoption and maturity.

Business value

Measures the potential to deliver economic benefits, competitive advantage, or tangible value creation.
High (8-10): Promises high return on investment and competitive advantages.
Medium (5-7): Has significant value, offering moderate returns with growth potential as it evolves.
Low (1-4): Its financial impact is uncertain or depends on external factors.

Ease of integration

How easily an organization can integrate the trend into its current processes and structure.
High (8-10): Simple implementation with few technical barriers.
Medium (5-7): Requires some modifications to processes or infrastructure, but integration is feasible.
Low (1-4): Requires complex changes, specific infrastructure, or regulatory adaptation.

01 Orchestrated Agent Economies

Deploy multi-agent systems to automate complex workflows and scale decision-making without human bottlenecks

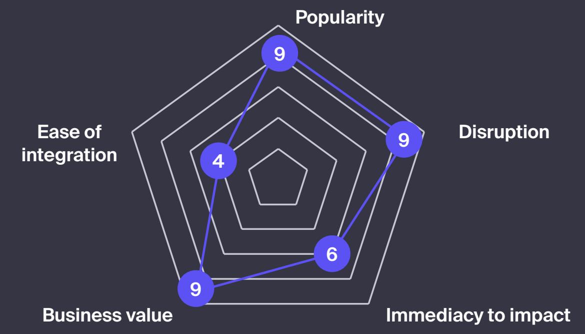
Orchestrated Agent Economies (multi-agent systems or MAS) represent an evolution of AI toward distributed architectures, where **multiple autonomous agents collaborate, share context, and coordinate decision**s to solve complex problems. Through direct communication or shared environments, these agents build dynamic models of objectives, memory, and action plans, integrating continuous learning to adapt and optimize outcomes.

Insight

The transition toward multi-agent systems marks the shift from point automation to autonomous orchestration of complex processes, enabling organizations to **scale decision-making and execution without direct human intervention**. Their ability to distribute intelligence, coordinate specialization, and dynamically **adapt makes them an enabler for environments where complexity, speed, and uncertainty surpass traditional models**, with direct applications in supply chain, financial operations, customer service, or intelligent physical systems.

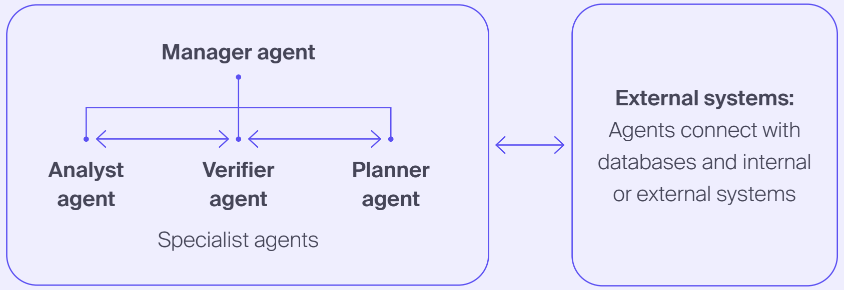
Trend prioritization matrix

7,4



A manager agent coordinates specialized agents and external systems, progressing from context acquisition to distributed execution and continuous adaptation.

Agent ecosystem connection



5. **Continuous adaptation:** capturing information from the environment and building a state representation.
4. **Interpreting and aligning objectives:** analyzing information, adjusting objectives, and synchronizing them with the system.
3. **Coordinating and negotiating actions:** interacting to define action through direct coordination, negotiation, or adjustment.
2. **Execute in a distributed manner:** acting autonomously, working in parallel, and contributing to the global objective.
1. **Perceiving and contextualizing:** integrating feedback and adjusting behaviors through collective learning.

Use cases

Autonomous Supply Chain
Negotiate and plan flows in real time during disruptions, reducing dependence on centralized planning

Advanced Healthcare and Simulation
Model complex scenarios through interaction of multiple specialized agents

Intelligent Financial Operations
Monitor markets, execute decisions, and manage risks in a coordinated and continuous manner

Distributed Cybersecurity
Monitor, detect, and respond to threats in a coordinated manner, anticipating attacks at multiple points

Autonomous Customer Service
They collaborate to resolve incidents end-to-end without intervention, integrating context and multiple systems

Sources: Google | IBM | Salesforce | Lyzr

02

Physical AI

Deploy autonomous physical systems to operate in real environments and reduce manual intervention at scale

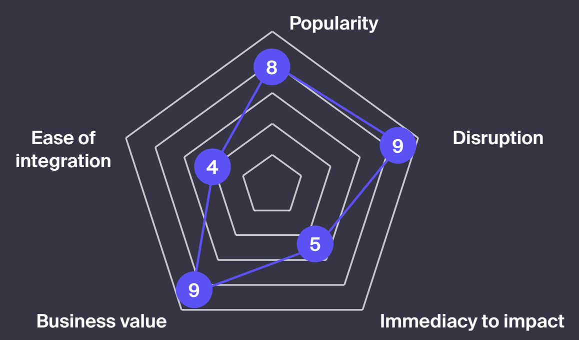
Physical AI represents the union of artificial intelligence with **systems capable of directly interacting with the physical environment**. Integrating advanced models (including vision and multimodality) with sensors, actuators, and control systems, these are capable of perceiving, reasoning, acting, and learning in real environments, transferring intelligence from software to physical operation.

Insight

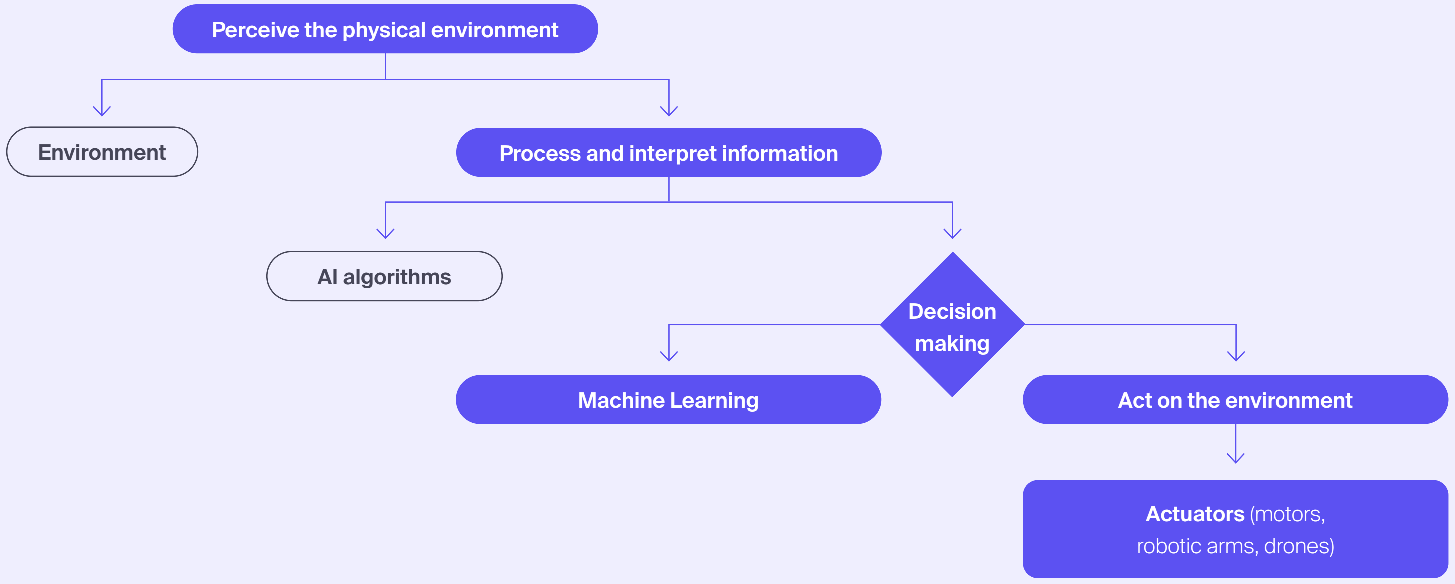
The convergence of foundational models, advanced simulation, computational capacity, and intelligent hardware is unlocking a **new generation of autonomous systems capable of operating in unstructured environments**. This marks the shift from rigid industrial automation to adaptive physical systems, capable of **generalizing tasks, learning in real time, and executing complex operations without explicit programming**, with direct impact on critical industries such as manufacturing, logistics, mobility, and healthcare.

Trend prioritization matrix

7,0



AI perceives, processes, and makes decisions to act in the physical world.



Cross-cutting levers for scaling

Focus on high-ROI use cases
Prioritize cases where tangible immediate economic impact is generated

Integration with existing systems
Connect physical systems with ERP, data, and operational processes

Real-time decision-making
Reduce latency through autonomous data-driven decisions

Workforce preparation
Adapt talent to human-machine collaboration and new roles

Distributed scaling
Replicate solutions across multiple locations while maintaining operational efficiency

Continuous ROI measurement
Monitor performance, costs, and generated value to optimize operations

Sources: IBM | NVIDIA | Appinventiv

03

Domain-Specific Language Models (DSLMs)

Adopt domain-specific models to improve accuracy, reduce risk and enable AI in regulated workflows

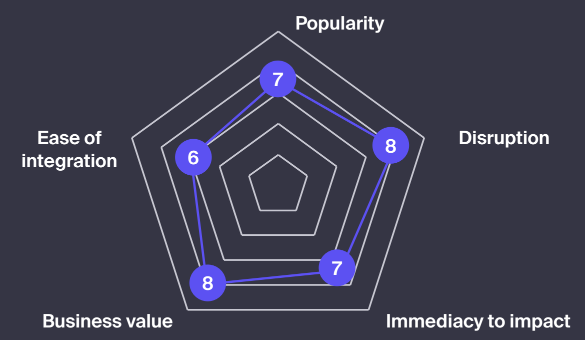
Domain-Specific Language Models (DSLMs) are AI models trained or fine-tuned with datasets specific to a particular industry, function, or process. Unlike generic LLMs trained on the entire internet, DSLMs **integrate knowledge directly into their parameters, enabling them to understand sector-specific terminology, regulatory context**, and domain-specific processes with greater relevance and precision through fine-tuning.

Insight

DSLMs represent the evolution from generalist AI to profitable vertical specialization. They offer surgical precision, integrated compliance, and economic efficiency in sectors where the margin of error is zero. Furthermore, they are a key architectural component of multi-agent systems, understood as agents powered by specialized models that execute more precise autonomous decisions in regulated contexts, enabling the transition from point automation to complex orchestration.

Trend prioritization matrix

7,2



From Generic Model to Expert Model

How DSLMs operate in enterprise

Critical Domain Selection
Identify functions where precision and context are critical

→

Data Curation
Collect proprietary, regulatory, and operational data that captures domain knowledge

→

Specialization (Fine-Tuning)
Adapt the model to incorporate domain expertise into decision-making

↓

Process Integration
Deploy within workflows, enabling context-aware automation

→

Governance and Continuous Improvement
Monitor performance, compliance, and bias, continuously refining the model as requirements evolve

Fine-Tuning with domain data

LLMs	DSLMs
Models **trained on large volumes of unstructured** and general-purpose data:	Models **fine-tuned with proprietary, labeled** datasets from a specific domain:
High computational cost	Greater contextual precision
Non-specific knowledge	Expert knowledge
Lower precision	Lower cost per use case

The transition from LLMs a DSLMs **redefines the cost, precision, and applicability model of AI** in enterprise environments

Source: Gartner

04 Unified multimodal intelligence

Integrate multimodal AI to improve decision accuracy and unlock richer, context-aware automation

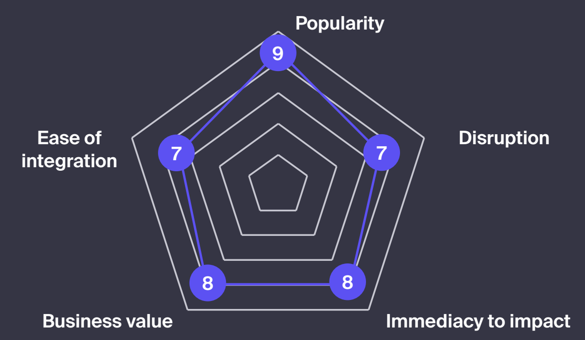
Unified multimodal intelligence refers to **models capable of processing, integrating, and generating information from multiple data types** (text, image, audio, or video) **within the same architecture**. Unlike unimodal LLMs, these systems capture relationships between different information streams to generate deeper contextual understanding and more precise decisions.

Insight

Multimodal AI transforms artificial intelligence from systems that interpret isolated inputs to **systems that comprehensively understand complex contexts**. This enables more precise **decisions, greater robustness against incomplete data, and more natural human interaction**. The benefit lies in the fusion of modalities, where heterogeneous **data is integrated into shared representation spaces through approaches like early, mid, or late fusion**, enabling diverse information to be related and contextual reasoning.

Trend prioritization matrix

7,6



Text and images are transformed into vectors and aligned within a shared semantic space

Text Encoder

- A dog
- A car
- A cat

Text is transformed into a vector that **captures meaning, context, and semantic relationships**

(IA) Common embedding

Both are projected into a shared **space where they are aligned based on semantic similarity**

Image Encoder

The image is converted into a vector that **encodes objects, spatial relationships, and visual features**

Transformational impact cases

Healthcare
Combination of medical imaging, records, genomic data, and context to improve diagnosis, personalization, and efficiency

Transportation
Fusion of camera, LiDAR, radar, and map data to interpret complex environments and execute safe decisions in dynamic conditions

Retail & E-Commerce
Integration of visual search, in-store behavior, and transactional data to optimize discovery, recommendation and conversion

BFSI
Biometric and behavioral authentication, assistants capable of interpreting text, voice, and documents to improve CX and reduce fraud

Smart cities
Integration of camera data, IoT and external conditions to optimize traffic, infrastructure maintenance, and operational response

Sources: Gartner | Super Annotate | Twelve Labs

05

Autonomous Digital Twin Systems

Use autonomous digital twins to simulate, predict and optimize operations in real time

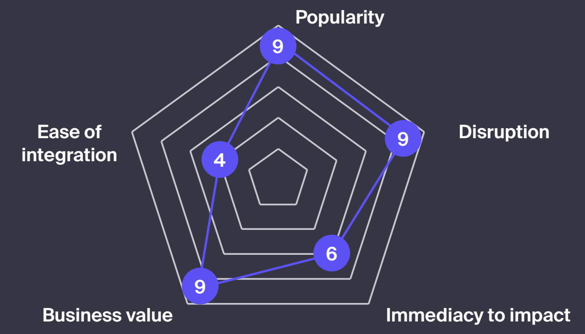
A digital twin is a virtual replica of a physical object, system, or process that uses real-time data to accurately reflect the behavior, performance, and conditions of its real counterpart. **Autonomous Digital Twin Systems integrate AI agents** that not only replicate and monitor, but simulate future scenarios, predict failures before they occur, and optimize parameters autonomously without direct human intervention **(closed-loop digital twins).**

Insight

The evolution toward autonomous digital twins **transforms simulation into active operational capability**, where systems not only predict scenarios but **recommend or execute actions in real time**. This allows organizations to move from reactive management to continuous data-driven optimization where the twin analyzes, executes predictive simulations, makes decisions, and transmits adjustments to systems, **reducing risk, accelerating decision-making, and improving efficiency at scale**.

Trend prioritization matrix

6,0



Autonomous Simulation and Action Loop: the digital twin replicates, analyzes, and continuously adjusts the physical system using real-time feedback.

Simulation Engine

Integrates physical models and real-time data to replicate asset behavior and maintain continuous alignment between the physical and digital worlds

AI Analytics Engine

AI models formulate decisions, optimize parameters, and coordinate actions based on operational objectives and risk levels

Autonomous Decision Layer

Apply machine learning on historical and operational data to detect anomalies, generate diagnostics, and simulate future scenarios

Digital Twin Behavior

Translates decisions into actions on the physical system and generates a loop continuous learning loop through feedback in real time

Use cases by industry

Energy & Power

Facilitates monitoring and optimization of distributed networks and assets, anticipating failures and adjusting consumption

Supply Chain & Logistics

It simulates end-to-end scenarios and adjusts logistics flows in real time in response to changes in demand, costs, or external constraints

Healthcare

Models patient or treatment evolution to optimize clinical decisions and reduce risk in high-uncertainty environments

Sources: McKinsey | IBM | NVIDIA | Toobler

06

Intent-Driven Development (IDD)

Shift from coding to intent definition to accelerate development and reduce delivery cycles

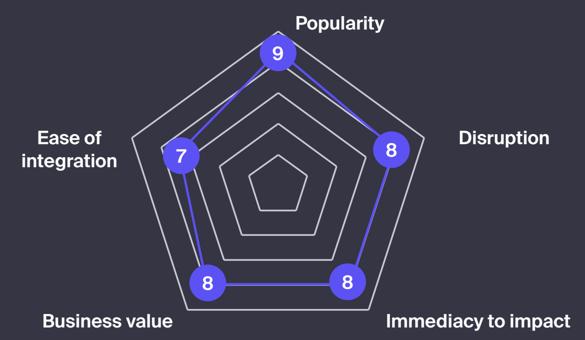
Intent-Driven Development (IDD) is a new methodology where humans define what should exist and why it matters, while autonomous agent systems determine how and when it gets built. Unlike previous methodologies where humans execute and processes coordinate human work, IDD **delegates full implementation to AI agents**: planning, coding, testing, iteration on failures, and deployment.

Insight

The model redefines software development by **shifting value from implementation capability to specification quality**. In an environment where code can be generated automatically, **the differentiating factor shifts from development speed to the clarity with which the problem, objectives, and constraints are defined**. This transforms both how software is built and team structure, where the focus moves from technical execution to product thinking, continuous validation, and the ability to translate intent into executable systems.

Trend prioritization matrix

8,0



The flow translates objectives into hypotheses, autonomous execution, and continuous validation, while managing key risks

How IDD operates

1 **Intent Mapping:**
Objectives, hypotheses, constraints, and metrics.

2 **Specify as hypotheses:**
Testable hypotheses that enable validation of whether the system delivers value.

3 **Autonomous execution:**
Agents generate, test, and deploy code without direct intervention.

4 **Measure and Validate in Use:**
Monitoring and comparison with initial hypotheses.

5 **Social Skills:**
Intent adjustment based on results.

Key challenges or barriers

1 **Limited Trust in AI Outputs:**
The inconsistent quality of generated code reduces trust.

2 **Vulnerability Risks:**
Generated code may incorporate security weaknesses.

3 **Development Lifecycle Instability:**
Continuous code generation increases changes and instability.

4 **Skills Gap:**
The developer's role expands and evolves toward agent supervision and orchestration.

5 **Imput quality dependency:**
La precisión de la intención se convierte en el principal factor de calidad

Relevant IDD use cases

Product development
Small teams define intent and agents execute full development, enabling product iteration in days instead of weeks

Modernization at scale
Multiagents refactor legacy applications and migrate architectures, reducing transformation timelines

Compliance-by-design
Agents develop complex systems while humans validate security and compliance, with controls from specification

Citizen Development
AI-powered platforms enable non-technical users to build complex applications and workflows from intent

Sources: Kodenerds | Medium | Dev.to | Toobler

07 Digital Provenance

Implement traceability systems to ensure data authenticity and enable trust in AI-generated content

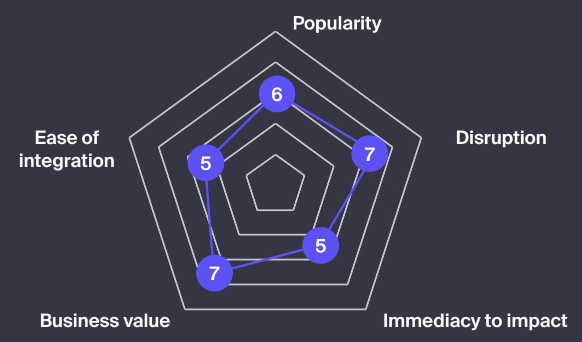
Digital Provenance is the **verifiable record of the origin, transformations, and chain of custody of a digital asset throughout its entire lifecycle**. Unlike traditional metadata or data lineage, it not only describes how information flows but provides an auditable history that identifies what data was generated, how it was modified, and who was responsible at each stage, ensuring authenticity, integrity, and accountability.

Insight

As the massive generation of synthetic content and the proliferation of deepfakes erode trust in digital environments, organizations are evolving from reactive **verification models to approaches based on origin certification**, where authenticity and traceability are integrated from the moment of creation. This shift positions Digital Provenance as **a key capability for ensuring information integrity, enabling AI system governance, and ensuring compliance in a context** where data veracity becomes a critical requirement.

Trend prioritization matrix

6,0



Digital Asset Traceability and Trust

Operational flow

How traceability is ensured

1 Capture & Register

Recording the asset creation event (source, author, and context)

Metadata standards, digital identity, and cryptographic signature

2 Track & Record

Each edit or transfer is recorded as chain of custody

Blockchain, immutable logs data lineage & tracking systems

3 Secure & Bind

Embedding and protection of collected information within the asset

Encryption, Invisible Watermarking, and Embedded Metadata

4 Analyze & Verify

History analysis, anomaly detection, and real-time validation

AI-assisted verification, semantic analysis, anomaly detection

5 Expose & Trust

Accessible traceability for users, systems, and regulators

APIs verification, dashboards audit, enterprise

Key relevancies

Key benefits

Transparency & Compliance
Enables **auditable traceability** for regulation, governance, and accountability

Attribution & IP Protection
Ensures authorship and ownership in increasingly complex digital ecosystems

Trust & Authenticity
Enables the distinction between **authentic and synthetic content** in AI-saturated environments

Digital Trust

Sources: Privacy Guides | True Screen | IBM | Techslang

08 AI Inference Optimization

Optimize inference efficiency to reduce AI costs and enable scalable production deployment

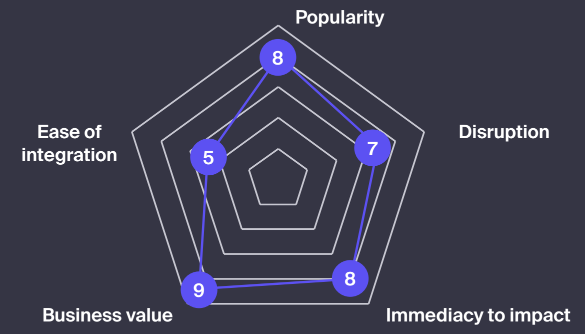
AI Inference Optimization refers to the **set of techniques and architectures designed to improve the performance, latency, and cost of AI models** in production. This approach integrates optimization at the infrastructure and model level, enabling organizations to scale intelligence services efficiently, sustainably, and adapted to each use case.

Insight

While AI adoption at scale exposes the economic unsustainability of current architectures, organizations are evolving from approaches focused on adding compute capacity to **models oriented toward maximizing inference efficiency**. Rather than investing in more hardware, the focus shifts toward using existing infrastructure more efficiently through optimization at the model, runtime, and orchestration level. This shift **reduces cost per request, improves latency, and enables more responsive applications**, turning AI from an expensive burden into a scalable and sustainable production service.

Trend prioritization matrix

7,4



Optimize inference across the application, model, and execution layers to reduce cost and latency

Inference optimization

Ai applications layer

Applications such as agents, copilots, or real-time systems **require continuous inference**, significantly increasing computational demand

Optimization layer

Model efficiency
The model itself is optimized to make it lighter, faster, and more efficient.

Execution efficiency
The way the model is executed is optimized to maximize performance and resource utilization.

Execution layer

Inference is deployed across hybrid environments (cloud, data center, or edge), **combining different hardware** architectures to balance cost, latency, and control.

Key barriers and challenges

1. **Technical complexity and talent shortage**
Effective optimization requires deep knowledge, which limits adoption due to the shortage of profiles capable of operating these environments

2. **High model dependency**
Techniques must be adjusted to each model and context, hindering industrialization and requiring specific iterations

3. **Performance vs. Precision trade-off**
Reducing costs through aggressive optimization can degrade output quality, especially in sensitive sectors

4. **Integration with existing systems**
The transition toward runtimes and optimized architectures requires adapting or rebuilding legacy applications, increasing implementation effort

Sources: Deloitte | II | Google | NVIDIA | II

09 Next-gen hybrid computing

Adopt hybrid compute models to balance cost, latency and control across workloads

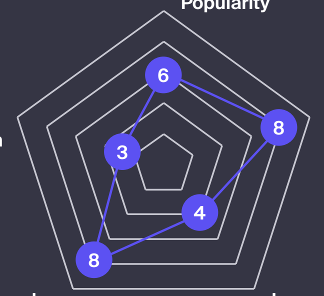
Next-gen hybrid computing combines different environments along with multiple types of specialized hardware, such as CPUs, GPUs, and AI accelerators, to execute complex workloads more efficiently. Unlike traditional models centered on a single infrastructure, **this approach distributes each task to the most suitable environment based on cost, latency, data control**, or performance requirements.

Insight

AI is advancing toward increasingly complex and expensive models in terms of compute, energy, and operation, making traditional architectures based on a single environment or hardware type no longer viable. In this context, **balancing variables such as cost, energy availability, latency, data sovereignty, and compute capacity becomes a critical challenge**, driving the adoption of hybrid computing environments where **different infrastructures and technologies combine to execute each workload in the most cost-effective way**.

Trend prioritization matrix

5,8



Assign each workload to the most appropriate environment based on cost, latency, control, and performance

1. **On-demand elasticity and scalability**
Evita el sobreprovisionamiento y garantiza continuidad operativa al distribuir workloads entre entornos

2. **Resilience and business continuity**
Reduces single points of failure and ensures high availability during disruptions by distributing functions

3. **Latency and data proximity optimization**
Improves response times by placing workloads close to the user or the data source

4. **Infra-structure cost improvement**
Enables workload balancing across cloud and on-premises environments, assigning each workload to the most cost-efficient execution environment

5. **Regulatory compliance and data sovereignty**
Facilitates segmenting data and workloads while maintaining control over sensitive information

6. **Security and operational control**
Provides granular control over where and how workloads are executed, reducing exposure and improving governance

Workload-to-compute logic by problem type

- **Require significant computing power:** executed on specialized infrastructure (GPUs, HPC).
- **Require immediate response times:** executed close to the user or device (edge).
- **Require enhanced control and security:** executed in private or on-premises environments.
- **Variable or demand-spike workloads:** executed in the cloud.
- **Complex or emerging use cases:** combine multiple technologies (hybrid, quantum).

Sources: Deloitte | Arxiv | Hitachi Vantara | NTT Data | Vertiv | Splunk | Gartner

10 Geopatriation

Localize data and workloads to reduce geopolitical risk and ensure regulatory compliance

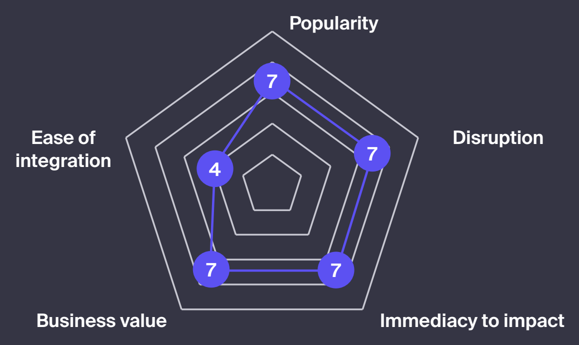
Geopatriation refers to the **relocation of workloads from global public clouds to local, regional, or sovereign infrastructures**, with the aim of maintaining control over data, systems, and their jurisdiction. This approach includes both migration to sovereign cloud regions and repatriation to on-premise infrastructure environments, as well as architecture redesign to limit cross-border data movement.

Insight

The **growing geopolitical fragmentation and regulatory tightening are transforming cloud** infrastructure into a strategic risk decision, where operating in external jurisdictions implies loss of control over data, compliance, and response capacity. Therefore, organizations are prioritizing sovereignty and resilience over global cloud efficiency, **adopting models where critical workloads remain under local or regional control**. This shift redefines the cloud model of the last decade: it is no longer about centralizing for efficiency, but distributing to ensure control and operational continuity.

Trend prioritization matrix

6,4



Geopatriation vs. Cloud repatriation comparison

Aspect	Cloud repatriation	Geopatriation
Key question	Should we stay in the public cloud?	Where should this workload legally operate?
Main trigger	• Cost and Performance • Architecture • Operational Control	• Geopolitical Instability • Jurisdictional Challenges • Exposure to Sanctions
Cloud usage after the change	Often reduces or abandons public cloud usage	Can continue using the cloud, but within national or regional boundaries
Scope of the change	Redefinition of infrastructure strategy	Mitigation of jurisdictional and territorial risks
Typical outcome	Migration to private cloud or on-premise	Regional cloud, domestic infrastructure, or controlled environments
Relationship	Broad category	Specialized subset focused on location risk

Why is it important now?

New legislation
Require storing or processing data within specific borders

New laws or agreements
Limit the use of services of a global or international nature

Cybersecurity
Requirements mandate keeping sensitive data at the local level

Trade conflicts
Restrict the use of certain providers in specific regions

Sources: Splunk | Canonical | Gartner

11 Autonomous Customer Experience

Automate end-to-end customer interactions to reduce resolution time and improve service scalability

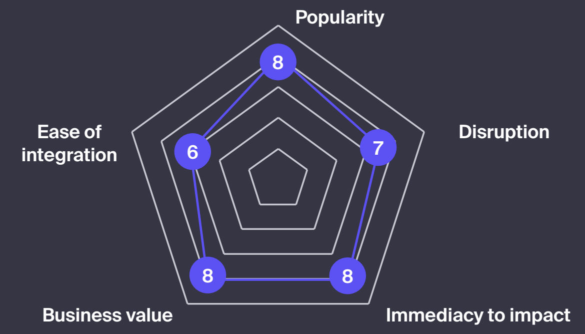
Autonomous Customer Experience refers to interaction models where AI-based systems autonomously manage the complete customer relationship cycle, **from understanding the need to its resolution, without direct human intervention**. This approach integrates natural language capabilities, decision-making, and continuous learning to manage complex interactions across multiple channels.

Insight

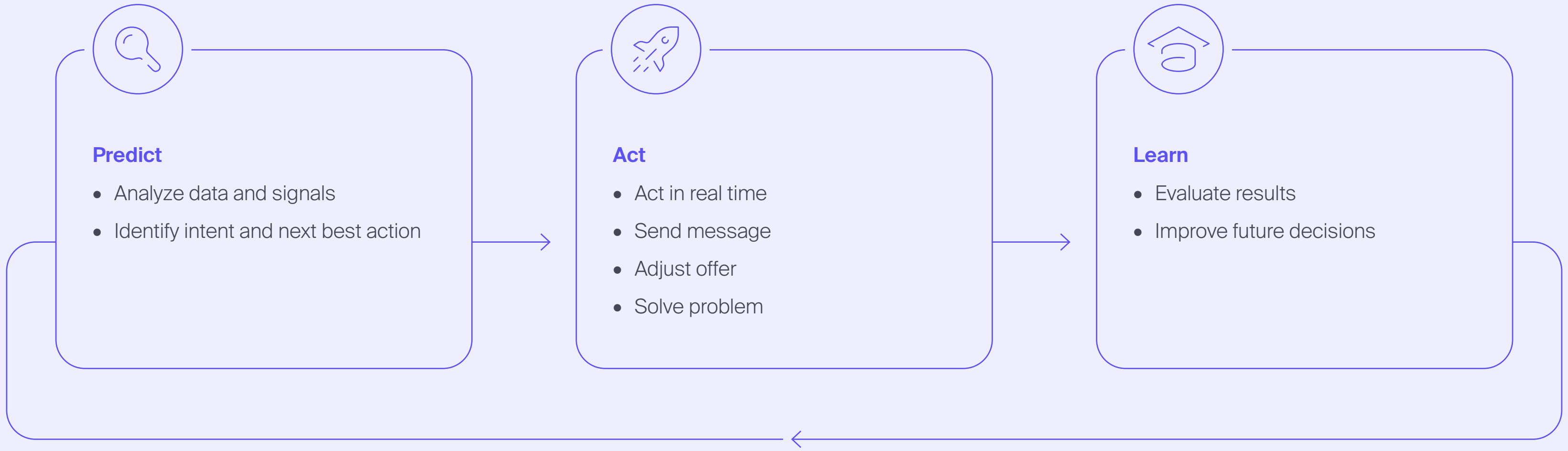
The adoption of Autonomous Customer Experience opens the door to transforming the customer relationship toward **more agile, personalized, and frictionless models, where interactions are resolved immediately and continuously** without depending on human availability. This approach enables organizations to significantly improve operational efficiency, reduce resolution times, and deliver more consistent experiences at scale, **while freeing teams to focus on higher-value interactions**.

Trend prioritization matrix

7,4



The flow anticipates customer needs, acts in real time, and learns from every interaction



Continuous feedback loop

Some application examples

1. **Retail**
   Dynamic personalization based on real-time behavior
2. **E-Commerce**
   Proactive service and early incident resolution
3. **SaaS**
   Early identification of churn and proactive retention
4. **Financial services**
   AI to detect patterns and trigger personalized communication
5. **Travel**
   Incident management and real-time communication

Sources: Salesforce | emplifi | CX Today

12 Agentic Commerce

Adapt to AI-driven discovery to capture demand and remain visible in agent-mediated journeys

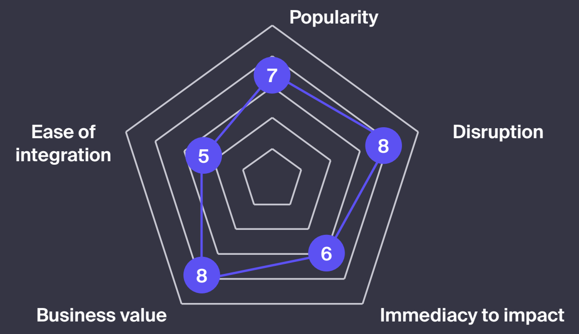
Agentic Commerce refers to a model in which AI agents act as intermediaries between the user and businesses, taking charge of interpreting intent, discovering options, and executing purchase decisions on their behalf. The discovery and transaction process shifts from being centered on human navigation to being structured around systems that consume information, compare alternatives, and make decisions in an automated manner.

Insight

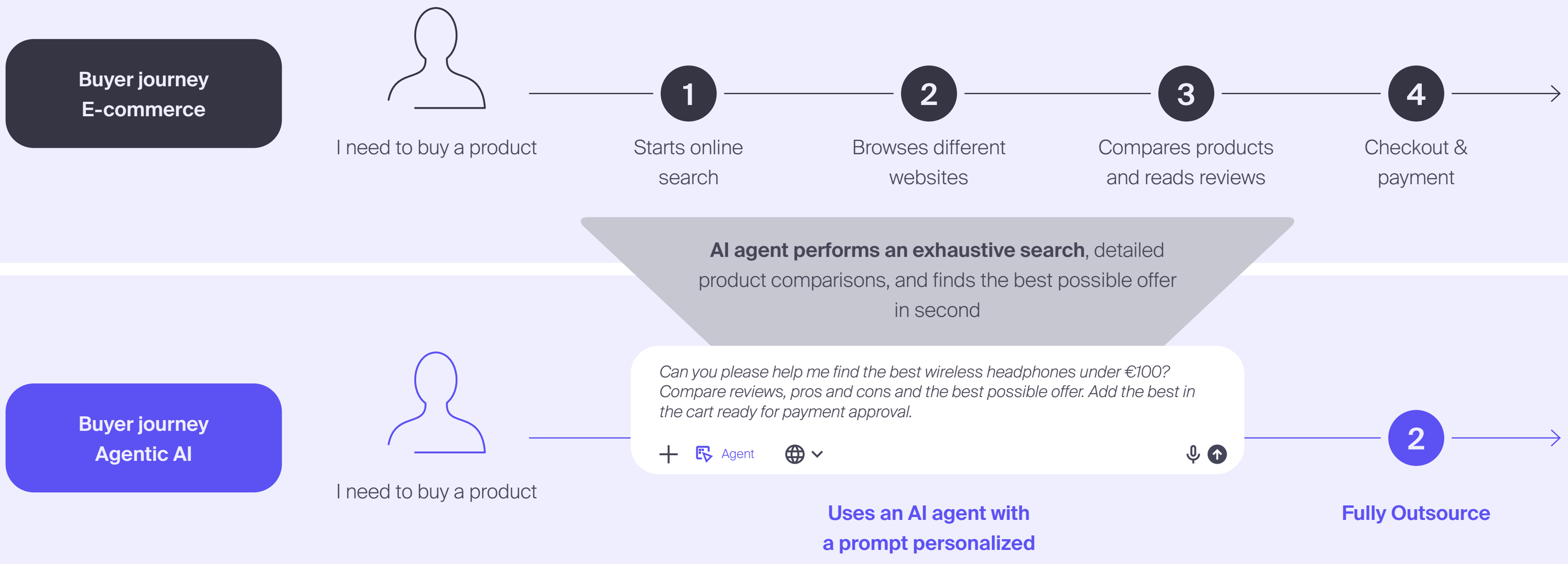
The emergence of agents as intermediaries in the purchase process is redefining how demand is generated and captured. This shift **enables capturing higher-intent traffic, reducing decision friction, and automating the purchase process**, but it also introduces a new competitive dynamic where visibility depends on the ability to be selected within automated decision environments. Companies must evolve from models oriented toward attracting and converting users to **architectures designed to integrate into agent ecosystems**, where the purchase decision occurs outside their own channels.

Trend prioritization matrix

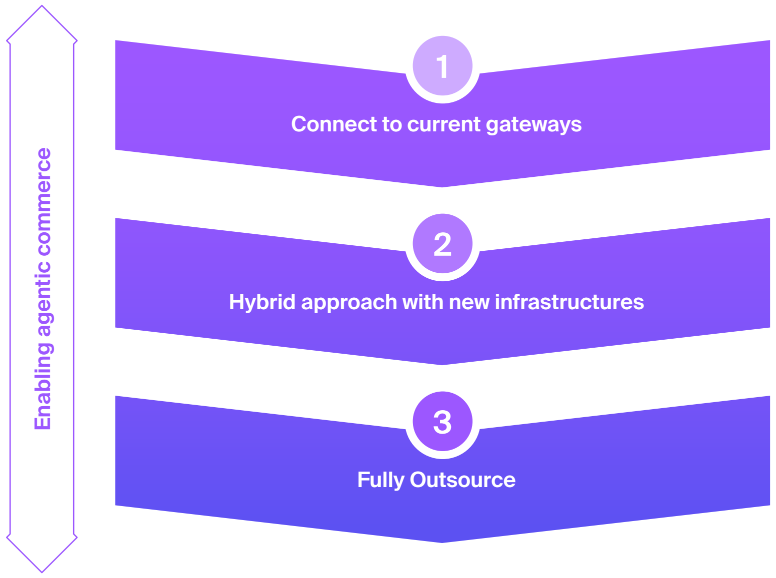
6,8



From Traditional E-Commerce to Agentic Commerce



Agent Discoverability& Readiness



Sources: Consultancy | Stripe | Agentic Commerce Dev | Adyen

13 Scalable Design Intelligence

Use generative design systems to scale experience creation without increasing team size

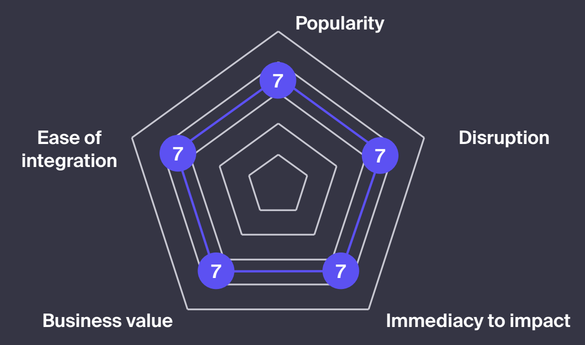
Scalable Design Intelligence is the evolution of design systems toward intelligent **platforms that integrate generative capabilities and governance rules to design**, adapt, and scale digital experiences in an automated manner. These systems enable **generating interfaces, components, and complete flows from business inputs or intent**, maintaining brand coherence, accessibility, and quality, without depending on the manual capacity of design teams.

Insight

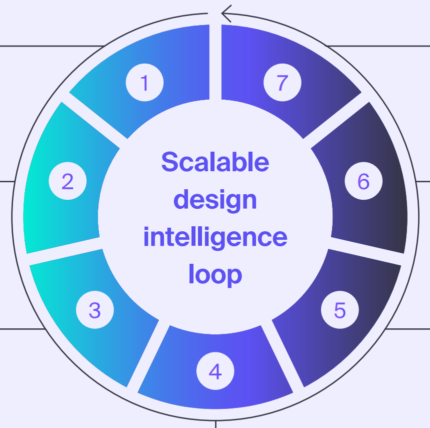
The explosion of digital channels, conversational interfaces, and personalization needs has turned design into a bottleneck for product delivery speed, now that interface generation is no longer limited by technology but by the ability to design and govern them. The **integration of generative capabilities within design systems enables scaling experience** production without proportionally increasing teams, shifting the focus from manual creation to **defining rules, patterns, and guardrails that ensure consistency and quality**.

Trend prioritization matrix

7,0



Transform intent, rules, and feedback into consistent, personalized digital experiences



Intent & Context Definition

- Definition of business and experience objectives
- Context, audience, and constraints modeling
- Translation of intent into actionable inputs

Generative Design Engine

- Generation of complete interfaces and flows
- Using patterns, prompts, and data as the foundation
- Reuse of logic and components at scale

Design System Governance

- Application of brand rules and consistency
- Accessibility, usability, and standards validation
- Quality control through guardrails y constraints

Automated Composition & Deployment

- Conversion of designs into production components
- Integration with frontend
- Reduction of friction between design, development, and deployment

Real-Time Personalization Layer

- Interface adaptation based on context
- Data and intent-based personalization
- Generation of contextual experience

Continuous Feedback & Learning

- Capture of usage and interaction data
- Pattern identification and improvements
- Feedback to the design system

Adaptive Optimization Loop

- Iteration based on performance and behavior
- Testing and optimization of design variants
- Autonomous system evolution

Sources: Capital Numbers | Medium | Codiant | Figma

14

Conversational & Multimodal UX

Redesign interfaces around intent to reduce friction and shorten user journeys

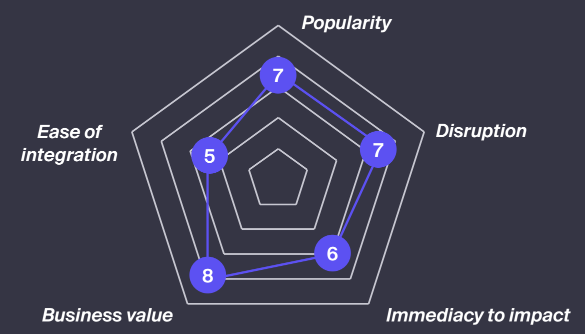
Conversational & Multimodal UX refers to the design of experiences where interaction moves beyond traditional graphical interfaces to be structured around **natural language and multiple modalities within the same flow**. Users interact through intent, while **systems interpret, respond, and generate experiences**. This involves creating new interaction patterns, components, and design principles.

Insight

The shift toward conversational and multimodal interfaces entails redesigning how business tasks are executed, eliminating steps and reducing friction. In this model, **users express intent and the system directly orchestrates the resolution**, which enables shortening processes, increasing conversion rates, and improving operational efficiency. However, **its value depends on how these flows are designed**: without clear objectives, defined metrics, and control over automated decisions, conversational interfaces tend to degrade into inconsistent experiences that do not scale.

Trend prioritization matrix

6,6



New Forms of Digital Interaction

Types of conversational UX interfaces

Text-based
Text-based conversational interaction

Multimodal UX
Combination of voice, text, image, and traditional UI

Voice-based
Interaction through voice commands

Gesture-based
Interaction through gestures and movements

Common Capabilities to Reduce Friction

Intent recognition and context management

Personality, tone, and brand alignment

Conversation architecture and flow design

Human handoff and escalation strategy

Strategic use cases

Sales qualification and lead conversion
The system filters and structures incoming prompts, guiding prospects through key questions. By leveraging previously gathered context, it shortens the sales cycle, **reduces customer acquisition costs, and increases conversion rates**.

Customer support cost optimization
Through flows designed to resolve repetitive tasks and predictable ticket deflection, achieving a **lower cost per ticket, reduced resolution times y support team scalability**.

Product onboarding and activation
The experience breaks down initial setup into sequential steps, translating into **faster activations, lower dropout** during sign-up and **better trial-to-paid conversion** a payment.

Sources: Zendesk | Gapsy | raw | Lollypop | II | Conversation Design Institute

15

Trust-Centric experience

Embed transparency by design to increase trust, enable adoption and ensure regulatory compliance

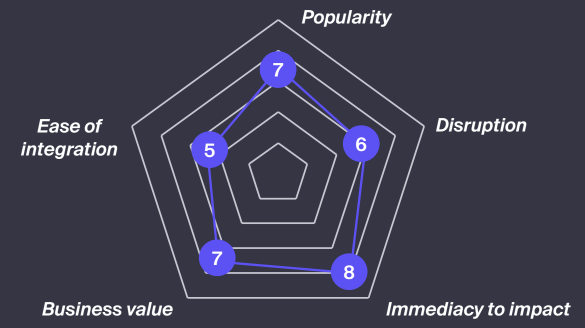
Trust-Centric experience by design is the discipline of designing AI-based digital **products and services by placing transparency, explainability, and user trust calibration** at the center of the process. If Explainable AI (XAI) is the technical **capability to audit a model, being Trust-Centric is the organizational capability to translate that complexity into a user experience that generates security, control, and loyalty**.

Insight

Currently, **customers demand immediate answers and deeply distrust decisions they do not understand**. At the same time, the AI Act turns algorithmic transparency into a non-negotiable legal requirement for any organization. Incorporating transparency and explainability principles from the product design phase **enables organizations to unlock the true potential of automation in customer relationships**. Maintaining "black box" experiences exposes the organization to significant penalties, but above all erodes the return on heavy investments already made in generative AI.

Trend prioritization matrix

6,6

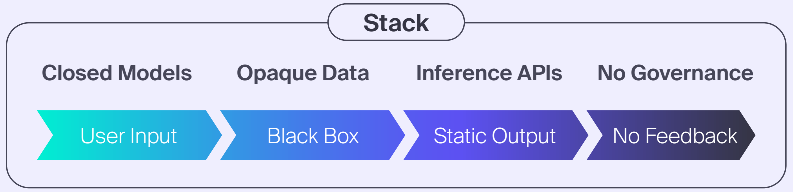


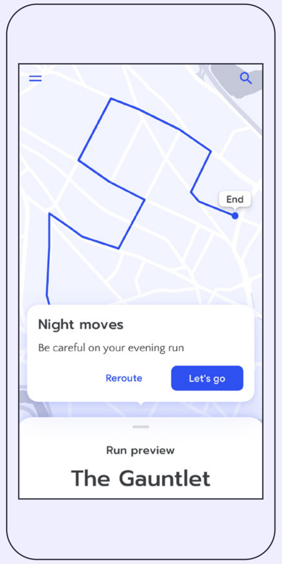
Comparison between an opaque experience and a trust-centric experience, where AI explains its decisions, reveals the data used, and enables user control

Opaque experience (black box)

Errors that erode trust and expose to regulatory risks:

- Presenting decisions without clear justification
- Hiding uncertainty or simulating absolute certainty
- Confusing transparency with technical exposure
- Designing experiences without considering risk level
- Showing outputs without explaining conditions
- Overloading interface with irrelevant explanations
- Eliminating the user's ability to intervene
- Breaking contextual continuity between interactions

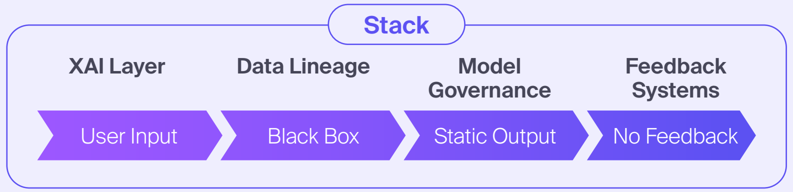


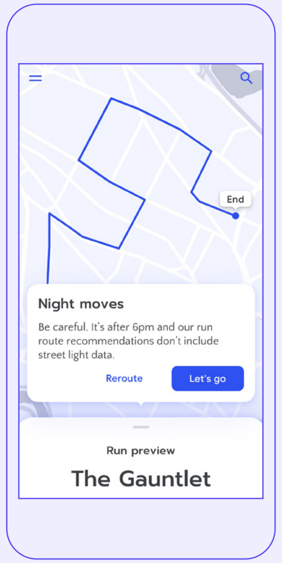


Trust-centric experience

Actions that turn a solution into a reliable digital partner:

- Explicar “por qué” en decisiones con impacto
- Make used and missing data visible
- Translate uncertainty into clear signals
- Integrate correction and override
- Design explanations linked to context and user
- Adapt transparency level to case risk
- Expose traceability in an accessible way
- Maintain contextual memory in every interaction





Sources: Silverfort | IBM | II

16

AI-Native Enterprise

Redesign operating models around AI to scale execution and reduce dependency on human labor

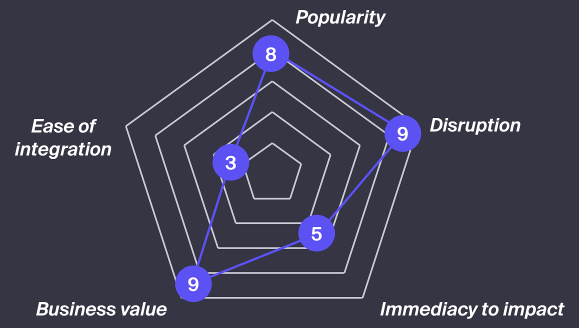
AI-Native Enterprise refers to an **organizational model in which AI is structurally integrated across the entire value chain**, from technology architecture to operational processes and decision-making. This approach materializes in agentic architectures, continuous data pipelines, automated workflows, and systems designed to learn and improve with use, **where AI is part of the base design of the product, operations, and experience.**

Insight

The advancement of AI is redefining the operational limits of organizations, making it unfeasible to compete with models based on intensive human execution. This is shifting the focus toward their replacement by autonomous systems, **drastically reducing operating costs and increasing execution speed**. Consequently, organizations shift to scaling through intelligence, generating cumulative advantages that are difficult to replicate. In this new context, technology ceases to be a cross-cutting enabler and becomes **the core of the business model, capable of capturing value directly and redefining how to compete in the market**.

Trend prioritization matrix

6,8



How to Evolve Toward an AI-First Operating Model

1. Create an enterprise AI agenda
2. Adopt AI in daily work
3. Anticipate the impact on your workforce
4. Demonstrate impact and scale
5. Create space to fund what works

Dimension	Digitally enhanced operating model	Ai-first operating model
Model engine	People as core, with digital support	AI agents as core, with human oversight
Processes and decision-making	People-centered processes, AI as support	AI-centered processes, automated decisions
Organization and roles	Traditional structure, enhanced static roles	Flat hierarchies, roles redefined around AI
Governance and risk	Reporting-based governance, ad hoc AI policies	Real-time governance with integrated AI and guardrails
Culture and focus	Efficiency-oriented	Speed, adaptability, and trust-oriented

Sources: BCG | II | Bizz | Ericsson

17

Service as Software (SaS)

Shift from software delivery to outcome-based services to capture value directly from execution

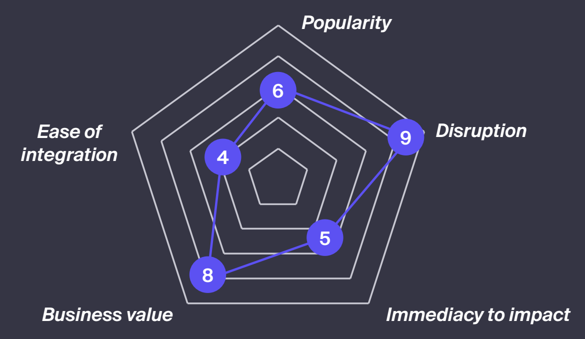
Service as Software (SaS) is a model in which **organizations deliver complete services executed by software, rather than providing tools for the user to execute them**.
This approach is based on the **combination of artificial intelligence, automation, and autonomous** workflows to operate end-to-end processes, integrating data, decision logic, and execution in a single layer.

Insight

AI's ability to automate decisions, interpret context, and execute complex processes is shifting value from software usage to the direct delivery of results, making license-based models lose relevance against outcome-oriented schemes. This **reduces the need for client expertise, eliminates operational friction, and enables scaling services** much more efficiently. In this way, companies stop capturing value through access to functionalities and **shift to doing so through the impact generated, transforming the logic of pricing, differentiation, and competition**.

Trend prioritization matrix

6,4



From SaaS to Software-Delivered Services

Moving from selling tools to delivering complete outcomes through AI and automation

Dimension	SaaS	SaS
Differentiation	Low — standardized workflows	**High — contextualized and adaptive execution**
Speed of change	Periodic release cycles	**Real-time reconfiguration**
Interface	Fixed UI (screens, forms)	**Conversational, multimodal, and generative**
Governance	Based on static roles and rules	**Based on context and dynamic policies**
Integration	Manual integration through APIs	**Automatic orchestration through agents**
Cost model	Subscription per user/license	**Pay per task, usage, or outcome**

Integration implications by role

- **CIO**: Architecture evolves from isolated applications to capabilities orchestrated by intelligent agents
- **COO**: Processes cease to be static and begin adapting dynamically according to operational context
- **CFO**: Financial model migrates from licenses to cost directly linked to generated results
- **Business**: Decisions cease to be based on standards and are optimized in real time according to context and interaction

Sources: HFS | II | Windward

18

Resilient & Autonomous Supply Networks

Deploy AI-driven supply networks to anticipate disruption and maintain operational continuity

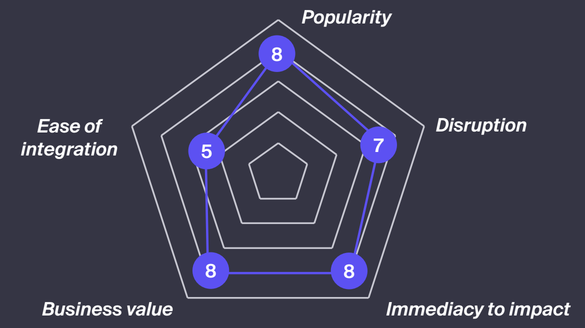
Resilient & Autonomous Supply Networks is the evolution of supply chains toward intelligent networks capable of anticipating disruptions, dynamically adapting, and executing decisions autonomously. This **integrates real-time data** (IoT, operational systems), **predictive analytics, scenario simulation, and AI agents** that automate key processes, enabling continuous, connected management oriented toward resilience.

Insight

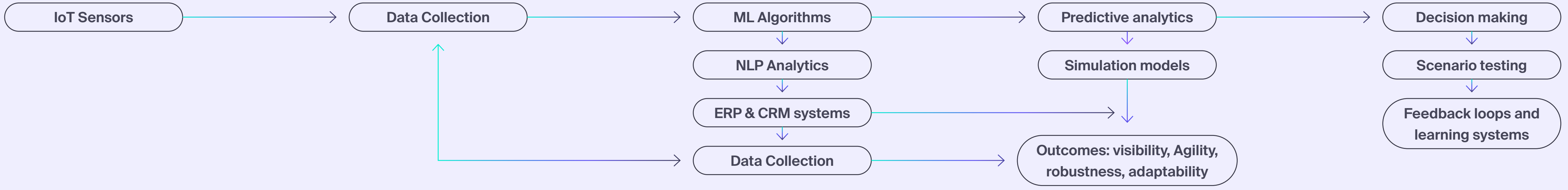
The growing geopolitical, climate, and economic volatility has turned disruption into a structural condition of supply chains, making models based on static planning and manual reaction ineffective. AI integration enables shifting from reactive management to **anticipatory capability, where risks are identified before materializing and decisions are adjusted in real time**. This transforms the supply chain into a competitive advantage, **capable of maintaining continuity, optimizing resources, and constantly adapting to a changing environment**.

Trend prioritization matrix

7,2



How to connect data, predictive analytics, simulation, and AI-assisted decision-making to anticipate risks and execute autonomous responses



Activation path

1. **Real-time instrumentation and visibility**
Connect a layer of live data (IoT, geopolitics, climate, operations) to eliminate blind spots.

2. **Predictive intelligence and risk detection**
Apply AI to anticipate demand, disruptions, and deviations before they occur

3. **Dynamic simulation and design (digital twin)**
Model "what-if" scenarios and validate decisions without impacting real-world operations.

4. **Assisted orchestration and decision-making (GenAI co-pilot)**
Generate recommendations, mitigation plans, and real-time decisions

5. **Autonomous execution and continuous learning**
Automate operational responses and improve the system with each event

Sources: IBM | Capgemini

19 Preemptive Cybersecurity

Shift from reactive defense to predictive prevention to reduce attack impact and exposure

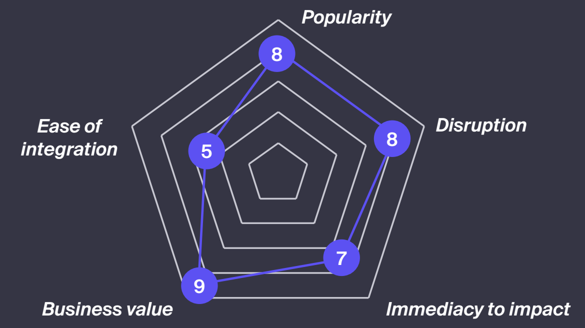
Preemptive Cybersecurity is a security approach that **seeks to anticipate, deflect, and neutralize threats before they execute**, rather than detecting them once they have compromised the system. This model **integrates AI-based predictive intelligence, continuous exposure management, deception techniques, and dynamic architectures** such as moving target defense that introduce unpredictability into systems.

Insight

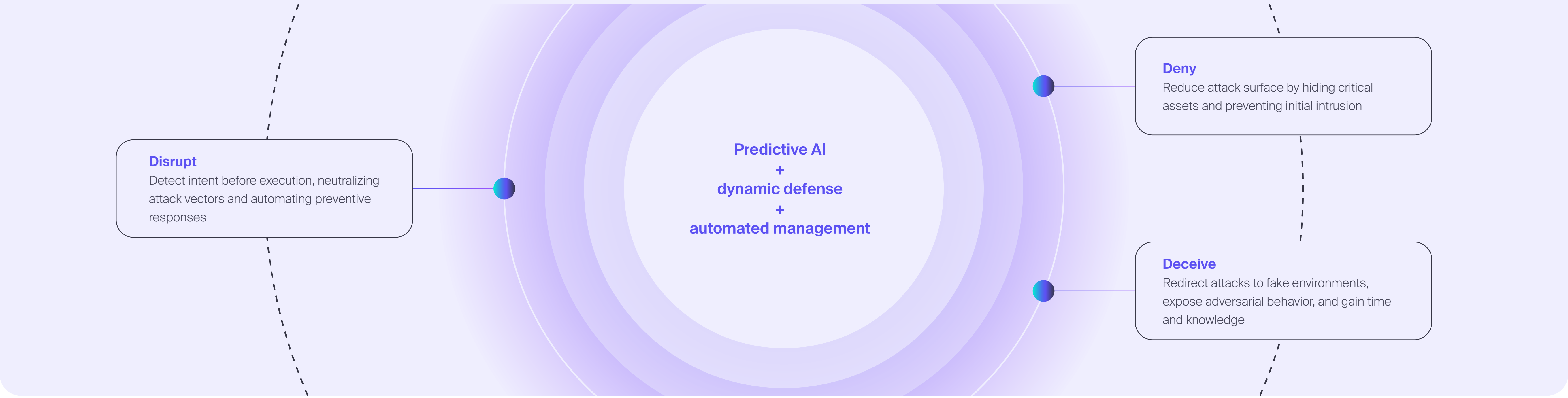
The automation of attacks through AI is drastically reducing the time between reconnaissance, exploitation, and propagation, making a defense model based on detection and response unviable, where the attacker always has a temporal advantage. Therefore, **security can focus on preventing the attack from materializing**. Organizations that adopt **this approach will be able to reduce the operational and economic impact of attacks by having cybersecurity with a preventive rather than reactive capability**, where the objective is no longer to manage incidents but to reduce their likelihood of occurrence.

Trend prioritization matrix

7,4



Security shifts from responding to incidents to preventing attacks from ever being executed



Sources: Gartner | II | Splunk | IONIX | Morphisec

20

Non Human Identity (NHIs) & Zero Trust Architecture

Secure machine identities to control access and enable safe automation at scale

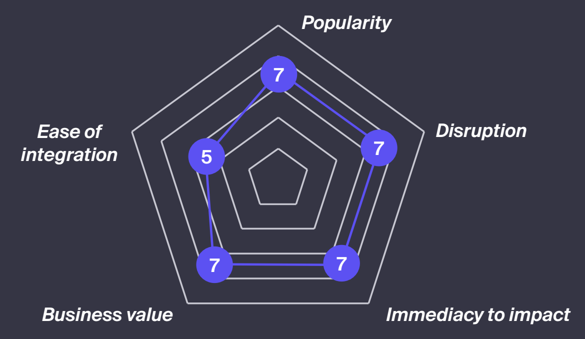
Non Human Identity (NHIs) & Zero Trust Architecture is a security model where identity, both human and non-human, becomes the core of access control in distributed systems. It integrates **machine identity lifecycle management** (APIs, agents, workloads, devices) **with Zero Trust principles**, establishing continuous validation, least-privilege access, and complete traceability in every interaction.

Insight

Enterprise security is moving from being a network problem to becoming an identity problem at scale. In environments where machines far outnumber humans and execute most operations, managing who accesses what and under what conditions becomes critical to avoid systemic breaches. Machine Identity + Zero Trust redefines the security architecture by **shifting control from the perimeter to every interaction, enabling operation in distributed, dynamic, and autonomous environments without compromising security or compliance**, reducing the attack surface and enabling secure automation at scale.

Trend prioritization matrix

6,6



Extend Zero Trust to non-human identities to strengthen access control, continuous verification, and automated protection

Steps to Secure Non-Human Identities

1. **Visibility**
   Know which identities exist
2. **Governance**
   Define ownership and permissions
3. **Modern Authentication**
   Use dynamic tokens and short-lived credentials
4. **Monitoring**
   Detect anomalous behaviors in real time
5. **Automation**
   Rotate credentials and respond to threats automatically

Sources: Silveerfort | IBM | II

21 Tokenized Asset Infrastructure

Tokenize assets to improve liquidity, transparency and programmability of ownership

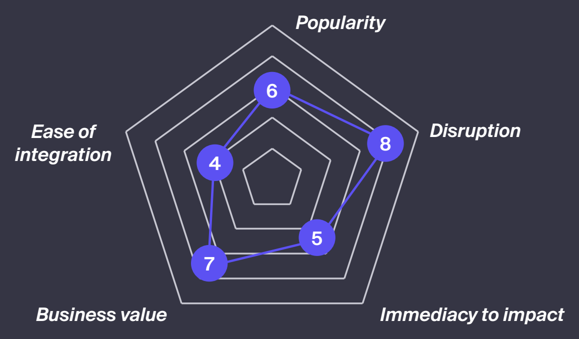
Tokenized Asset Infrastructure is based on the **representation of real-world assets** (RWAs) such as debt, real estate, commodities, or financial instruments **on blockchain infrastructures**, where ownership, transfer, and compliance are managed through programmable logic. This model enables fractional ownership, near-instant settlement, integration with digital financial ecosystems, and process automation.

Insight

The tokenization of RWAs marks the transition to the **digitalization of ownership and rights over them**. In an environment where traceability, operational efficiency, and interoperability are critical, organizations need **infrastructures that enable managing assets beyond closed systems and fragmented jurisdictions**. Regulatory maturity and institutional adoption are pushing tokenization into multiple industries, turning it into a common layer for representing, transferring, and governing assets programmatically.

Trend prioritization matrix

6,0



Convert real-world assets into digital tokens to record ownership, execute transactions, and manage liquidity

How a Real-World Asset Is Tokenized

1. Identification and structure of the asset
2. Value digitalization
3. On-chain issuance and registration
4. Legal integration and operational
5. Management, liquidity, and continuous compliance

- Intellectual property
- Stocks and securities
- Currencies & stablecoins
- Art and antiques
- Raw materials
- Real estate and property

Any real-world asset can be digitally represented to be registered, exchanged, or sold

Use cases by sector

Finance

Tokenization of bonds, funds, and private credit transforms financial markets through on-chain issuance, real-time settlement, and programmable ownership

Real Estate

Tokenization of buildings or energy projects enables fractional investment, secondary liquidity, and continuous asset financing

Healthcare

Tokenization of clinical data and trials enables secure, auditable, and monetizable among ecosystem actors

Public sector

Tokenization of property records or digital identity enables secure management, fraud reduction, and administrative automation

Sources: Investax | PYTH | Tokeny | Transak | SoluLab | RWA

22 Green AI & Sustainable Computing

Optimize AI energy consumption to reduce costs and enable sustainable scaling

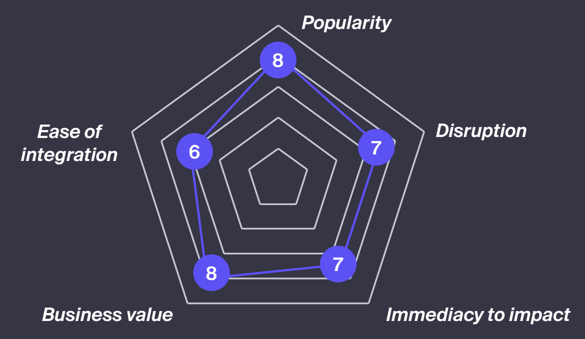
Green AI & Sustainable Computing is the capability to design, deploy, and operate AI systems under energy efficiency, resource optimization, and operational sustainability criteria, integrating: **Green in AI**, focused on reducing the AI stack's own consumption; **Green by AI**, oriented toward using AI to optimize processes and improve efficiency; and **Sustainable Computing**, which structures the infrastructure to support AI scaling within physical, economic, and regulatory limits.

Insight

The exponential growth of AI is shifting the bottleneck from innovation to deployment. Thus, Green AI moves beyond ESG to become the **capability that determines which organizations can scale intelligence and which cannot**. On one hand, Green in AI redefines how intelligence is built and executed. On the other, **Green by AI** transfers that intelligence to business, optimizing supply chains, energy consumption, industrial operations, or networks, turning sustainability into measurable operational efficiency.

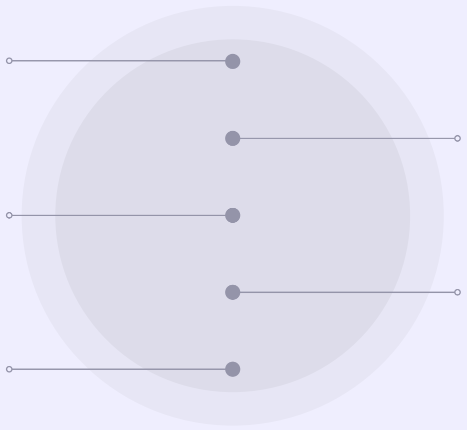
Trend prioritization matrix

7,2



How to Reduce AI's Energy Cost

Green in AI: Making the AI stack more efficient



Carbon-aware scheduling
execution based on carbon intensity and energy availability

Hybrid compute optimization
Maximización de uso de GPU/TPU y balanceo de cargas

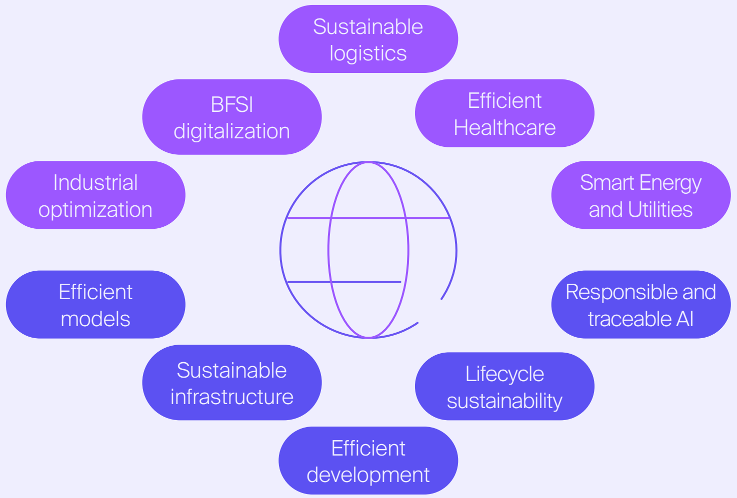
Hardware efficiency
Maximization of GPU/TPU usage and load balancing

Inference optimization
Reduction of cost per token and efficient memory usage

Energy telemetry
Real-time monitoring of consumption and performance

Sustainability evolves from a CSR metric into a driver of operational efficiency

Green by AI: using AI to optimize business processes and consumption



Sources: Iberdrola | PwC | Binary Semantics

23 Sustainability-as-a-Service

Automate ESG measurement and action to turn sustainability into an operational capability

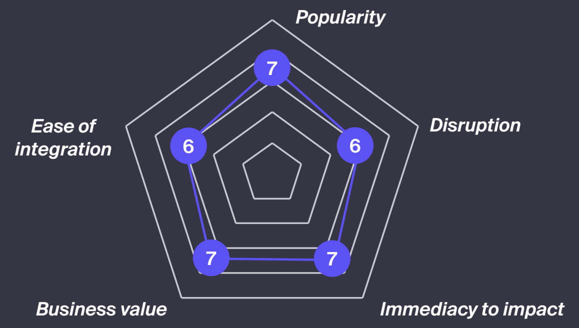
Sustainability-as-a-Service combines AI, operational data, and managed service models to transform sustainability into a continuous, measurable, and externalizable function. It integrates **automated ESG data capture, impact calculation** (emissions, resources, biodiversity), **and the execution of reduction** initiatives within an as-a-service model, where organizations consume sustainability as an end-to-end service instead of building it internally.

Insight

Sustainability is shifting from a declarative exercise to an operating system that requires precision, traceability, and continuous execution. But **organizations lack the capability, data, and talent to measure and act** at scale on their real impact. Thus, Sustainability-as-a-Service emerges: **a model that industrializes sustainability through data platforms, AI, and specialized** services that cover the entire cycle, from measurement itself to full intervention.

Trend prioritization matrix

6,6



Measure, digitize, and automate ESG actions to move from reporting to continuous improvement

1. Ecosystem activation
2. Definition of measurement system
3. Continuous capture and monitoring
4. Digitalization and traceability
5. Intelligence and simulation
6. Automated reporting & compliance

Benefits

- Enables AI deployment in critical decisions by making outcomes understandable, auditable, and acceptable to users, eliminating a major barrier to adoption
- Integrates XAI, traceability, and disclosure from the design phase, reducing friction with AI regulations, audits, and costly rework in later stages
- By exposing uncertainty and enabling human intervention, it prevents overreliance on AI and supports more robust human-AI decision-making
- Standardizes trust capabilities, reducing implementation effort across use cases and enabling faster scaling

24

AI-Augmented Workforce

Redesign roles and workflows to integrate AI agents and scale productivity beyond human limits

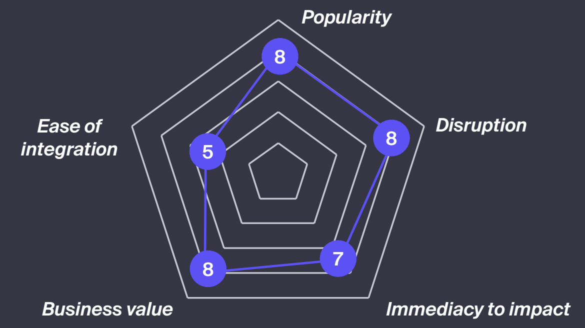
AI-Augmented Workforce redefines how teams are structured, **integrating AI agents as a new work category**, called **silicon-based workforce**, **that operates alongside human talent**. It is not about automating existing tasks, but about redesigning roles, processes, and responsibilities so that humans and agents collaborate in real time, leveraging their complementary strengths.

Insight

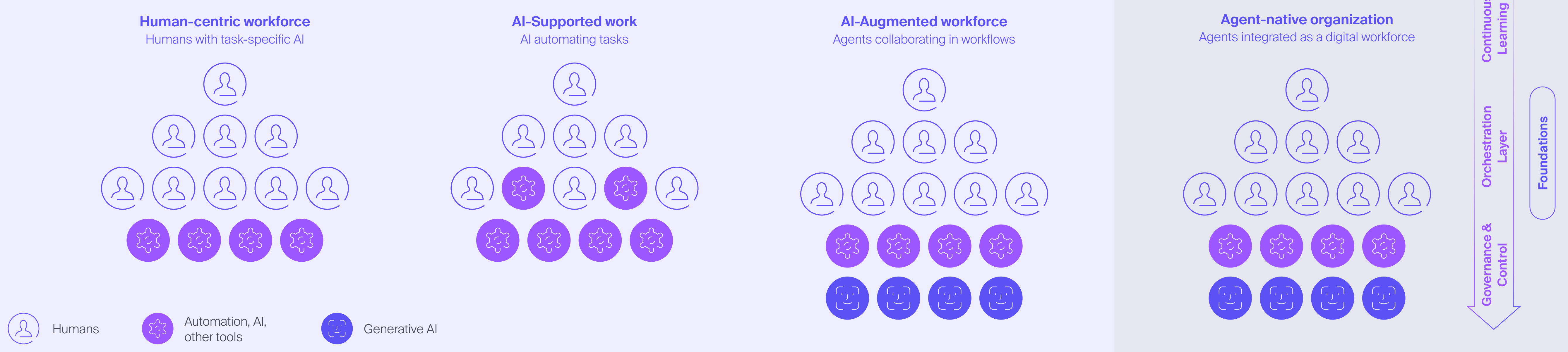
Current work models remain designed for human capabilities, limited in scale, availability, and execution, which prevents capturing the real potential of automation. The real change occurs when organizations **redesign their processes as hybrid systems, where agents take on continuous execution** and humans focus on oversight, decision-making, and value generation. Organizations that adopt this logic will be able to scale productivity and operational capacity without depending exclusively on human capital growth.

Trend prioritization matrix

7,2



Evolution from human teams augmented by AI to organizations where agents execute work in an integrated way



25

Full-Journey Process Automation

Redesign end-to-end processes for autonomous execution, reducing manual intervention and operational friction

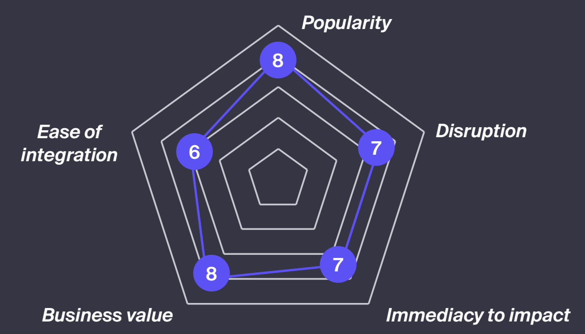
Full-Journey Process Automation involves **redesigning complete end-to-end processes to be executed by orchestrated AI agent systems**, capable of deciding, coordinating, and acting without constant human intervention. Unlike traditional automation focused on isolated tasks, this approach **treats the process as a continuous unit, where multiple agents collaborate to achieve an outcome**, managing exceptions and adapting in real time.

Insight

Current operating models continue to organize work into tasks executed and supervised by humans, even when capabilities to automate complete processes already exist. The emergence of AI agents **enables reorganizing work execution around autonomously managed end-to-end processes**, where human intervention shifts toward exception oversight and system control. This redefines the operational structure: **from teams that execute tasks to organizations that manage autonomous execution systems, changing the basis on which productivity and operational capacity are measured**

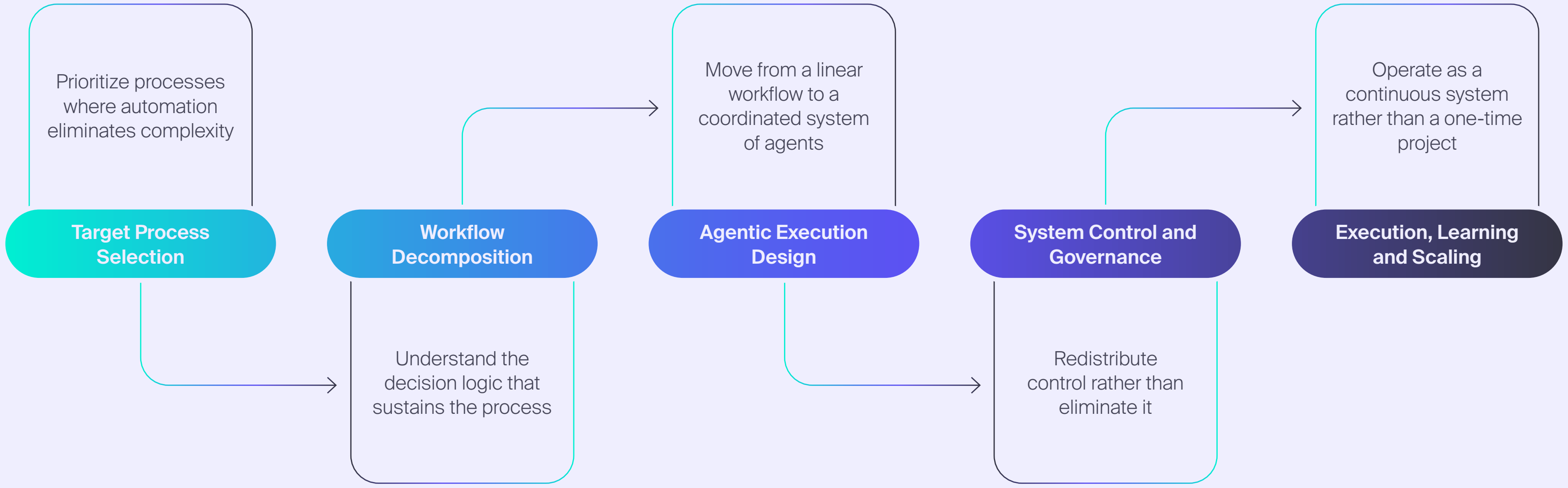
Trend prioritization matrix

7,2



From Linear Processes to Coordinated Agent Systems

Automation evolves from handling isolated tasks to orchestrating end-to-end processes as living, adaptive systems.



Use cases by sector

Procure-to-pay Autonomous
Reduction of cycles from days to hours and elimination of manual bottlenecks

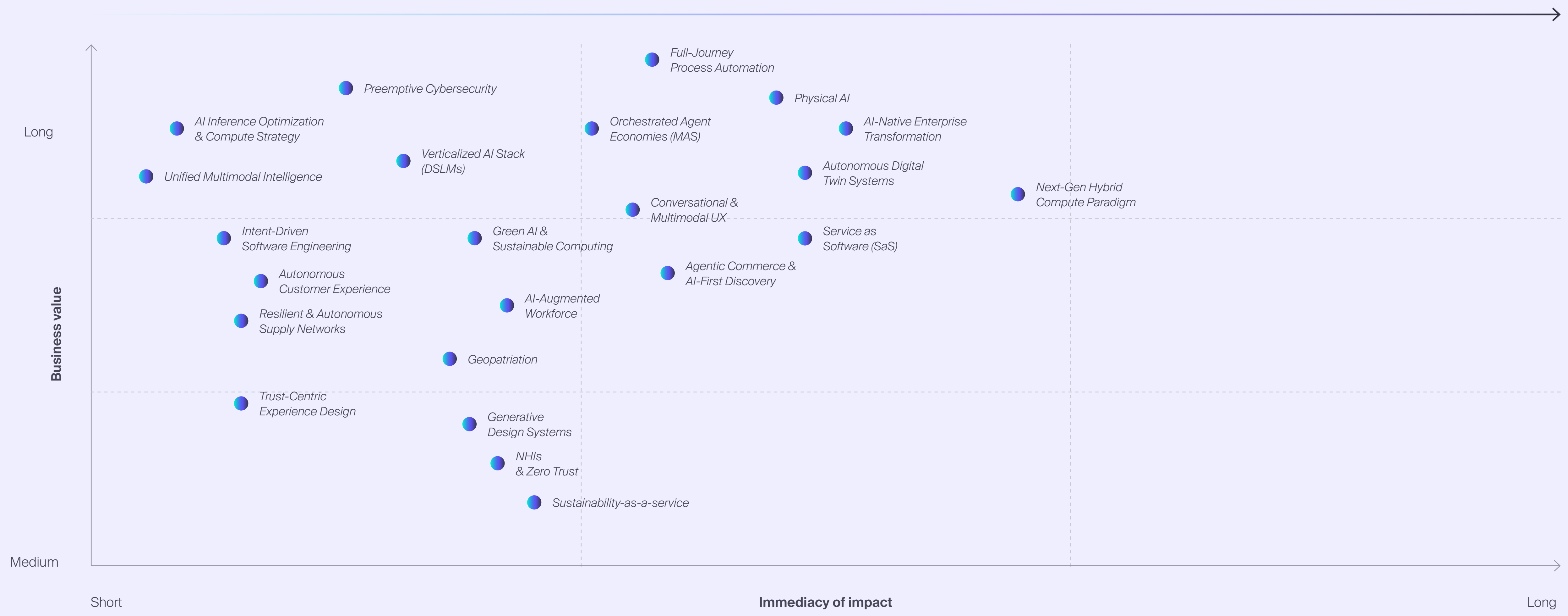
Autonomous incident response
Reduction of response time and real-time risk containment

End-to-end order management
Scalability without proportional increase in operational costs

Sources: Automation Anywhere | RPA | Rootstack

Balance quick wins and long-term bets to maximize value across emerging technologies

The impact matrix illustrates the relationship between business value and time to impact for various emerging technologies. While technologies with high business value and short time to impact offer immediate opportunities for quick wins, those with high business value and longer time to impact represent significant long-term potential but require patience and sustained investment. Overall, the landscape shows a balance between rapid-commercialization solutions and transformative technologies that will develop over time.



Softtek®

softtek.com