

TechnoVision 2025

Trends and innovation in AI, robotics, business, and all that Data Jazz

Ron Tolido, CTO, Capgemini Insights & Data global business line



16th Edition

37 Trends

7 Trend Containers

TIV council / architects' community

Visionary

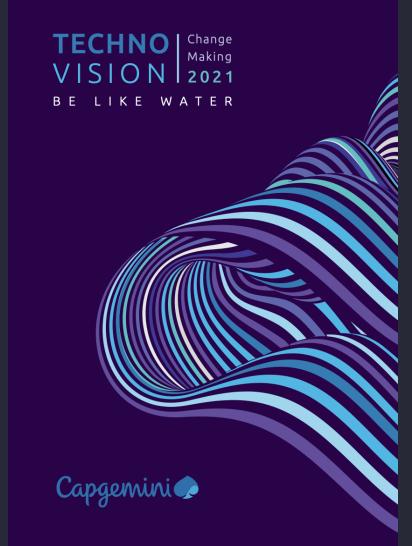
Framework

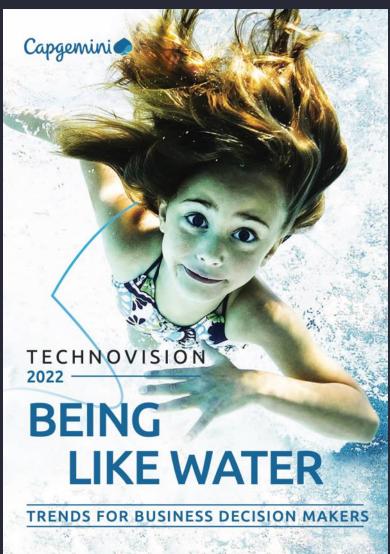
Playful

Actionable











2024 Technology Business Landscape

Dual Transition

- Technology-powered augmentation
- Sustainability Journey

Uncertainty²

- Geopolitical
- Economical
- Scarcity

Technology €∋ Business

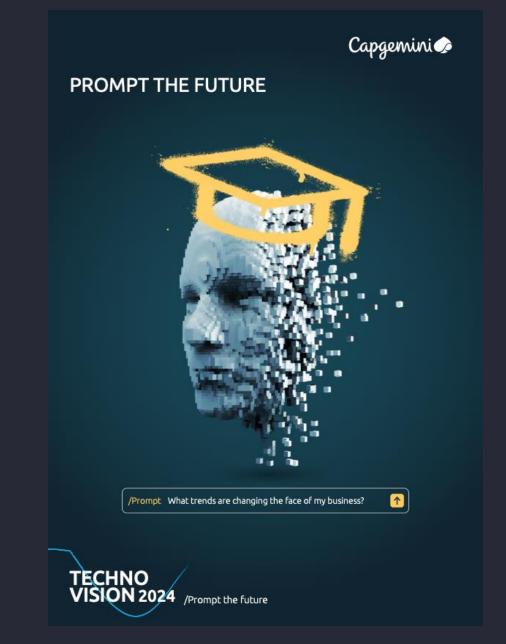
- Technology is entwined in every scenario
- Augmentation by AI and much more
- Technology has its own environmental impact
- The more *artificial*, the more *real* is rediscovered
- Focus on scale, regulatory compliance and ethics













TECHNOVISION AT A GLANCE



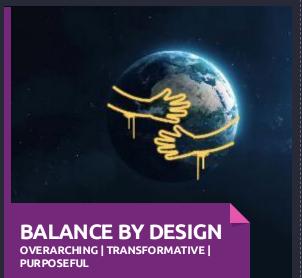




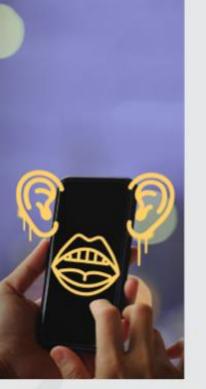














SARAH SAUNDERS EXPERT IN RESIDENCE

HONEY, I SHRUNK THE APPLICATIONS

Next-generation agile applications, built on the concepts of Microservices, API-first, Cloud-native, and Headless, make up an applications portfolio that is continuously tidied

Applications used to be monoliths, cumbersome, bundled together with traditional user interfaces, and hardcoded business logic. Well, we have big news: the science of application miniaturization is here — building application services that are tiny, stateless, efficient, and scalable. They are flexible, adaptive, and responsive, morphing themselves seamlessly around new situations, needs, and use cases. The key ingredients of applications shrinkage are Microservices, API-first, Cloud-native, and Headless (MACH). Best combined with a miniaturization approach to the entire applications portfolio as well, firmly getting rid of old, inflexible, and costly legacy applications — making space for new ones. Get your magnifying glass ready, huge things are happening.

WHAT

- A Technology Business needs open, agile application services that can seamlessly address both current and future needs. A combination of Microservices, APIs, Cloudnative, and 'Headless' (MACH) design is the blueprint to achieve this result.
- Microservices can be viewed as the result of a marriage between component-oriented architecture and serviceoriented architecture. Software-as-a-suite is composed of many small, business-driven components with very specific business-domain responsibilities.
- An application programming interface (API) provides standardized, open access to an application service or data set, decoupled from the actual user interface of the application.
- Creating application services to be deployed 'natively' for the cloud means that all well-known benefits of the cloud are built-in by default, such as elasticity, adaptability, scale, security, availability, and efficiency.
- The resulting application services deliver one single business capability in an independent, loosely connected, and self-contained fashion. They do one thing and do it well.
- Few organizations master the art of systematic application rationalization. An end-to-end approach is needed to make room for new applications services, enabled by tools such as Capgemini's Clear Sight IT Decision Maker.

USE

- Covestro, a Germany-based manufacturing company, selected Capgemini to deploy a collaborative and iterative strategy to . The team used tools and frameworks to automatically review code, speed up delivery, and set the groundwork for the release process.
- Capgemini was selected by Carrefour, for the implementation of a <u>cloud-based integration platform</u> that provides Carrefour Romania a secure environment for integration service delivery and API traffic monitoring. The new platform also enables features such as analytics and operations automation, API developer management, flexibility, and governance over data exchanged between systems and users.
- Westech, a US-based company, adopted a microservicesbased application development architecture. It adopted Red Hat OpenShift Dedicated, a fully managed solution that runs in an AWS cloud. Developers can set up new environments in minutes and the company can cut its number of physical servers by 50%, improving operating expenditure (OpEx).
- A US-based investment company modernized its systems by migrating data and refactoring business functionality to the AWS Cloud. Using the CAP360 solution, the migration process was accelerated and the firm was able to retire its PCF-based services and standardize everything on Amazon ECS for its APIs.

IMPACT

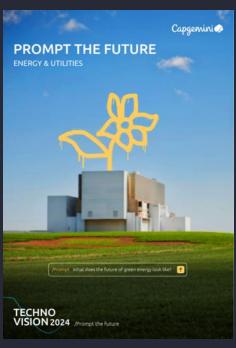
- Faster, scalable, and intent-driven application services that are modular, sustainable, and fit for current and future Technology Business purposes.
- Faster time-to-market for new business services and products, as the enabling application services can be rapidly selected and integrated.
- Less need for massive, troublesome upgrades of entire application suites, as minimized application services are autonomous and only loosely coupled to others.
- Lower cost of software development and maintenance combined with higher software quality and reduced time- to-market.
- Faster development and change cycles due to the slimming down and reduction in complexity of the entire application portfolio.
- Better reuse and upcycling of application services, as they
 can be used, integrated, and interfaced in many ways,
 wrapping old legacy systems in peripheral microservices
 allowing faster adoption, and saving scarce human
 resources and energy.
- Freedom to develop custom user interfaces shows that 76% of organizations have realized quantifiable benefits from their voice and chat initiatives in a variety of areas, from reducing customer service costs to increased NPS.

TECH

- Re-platforming: AWS Bluage, LzLabs Software Defined Mainframe, Capgemini Clear Sight IT Decision Maker, Capgemini Cloud Migration Factory, AWS Mainframe. Modernization, Confluent
- Agility: SAFe, LESS (Large Scale Scrum), Scrum@Scale, Disciplined Agile
- DevOps: Headspin, OpenGitOps, Confluent Platform, Helm, GitLab, Azure DevOps Services, Capgemini DevOps. accelerator - CREATE
- Microservices infrastructure: Kubernetes, VMware.
 Tanzu, Kong, Cortex, communicating event streams such as AWS Kinesis, Google Cloud Dataflow, Confluent, Apache.
 Spark, Kafka, AWS Lambda, KEDA
- Voice assistant platforms: Microsoft Cortana, Apple.
 Siri, Amazon Alexa, Google Duplex and Assistant, Alibaba's.
 AliGenie, Bixby, Hound, Databot, Voice Qube
- Text assistant platforms: WeChat Open Platform, Microsoft Bot Framework, Facebook Messenger Platform, Ulpath Druid



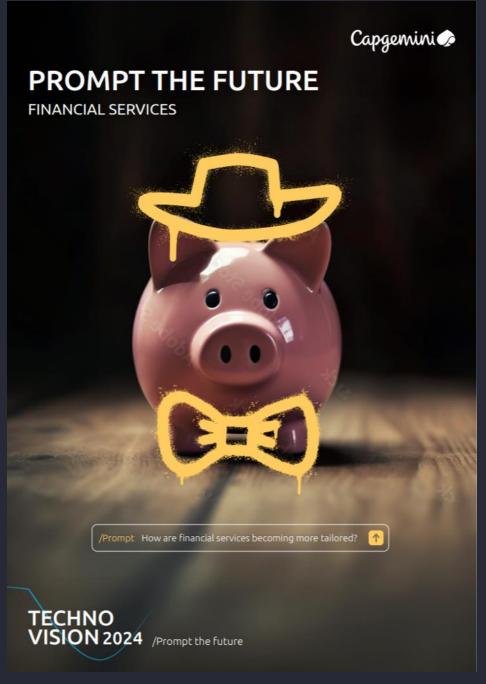
Playbooks













Generative AI is now entering the dawn of agentification where Al systems are evolving from isolated tasks to specialized, interconnected agents. In fact, according to a Capgemini Research Institute survey of 1,500 top executives globally, which will be published in January 2025, 32% of them place AI agents as the top technology trend in data & AI for 2025. Thanks to the increasing capabilities of logical reasoning in Gen AI models, these will start operating more autonomously while providing more reliable, evidence-based outputs, and will be able to manage tasks such as supply chains and predictive maintenance without constant human oversight. AI systems can handle dynamic decision-making in more sensitive environments where correctness is paramount. The next step will be the rise of a super agent, an orchestrator of multiple AI systems, optimizing their interactions. In 2025, these advancements will enable new Al ecosystems across industries, allowing new levels of efficiency and innovation.





AI is transforming cybersecurity, enabling both more sophisticated Gen Al-enhanced cyberattacks and more advanced AI-driven defences to the point where almost all organizations surveyed (97%) in the recently published Capgemini Research Institute's report say they have encountered breaches or security issues related to the use of Gen AI in the past year. In recent years, with remote work, companies now face a larger attack surface and greater vulnerability to these threats. In fact, 44% of top execs in the upcoming Capgemini Research Institute report place the impacts of Gen AI in cyber as the top technology topic in cybersecurity for 2025. To mitigate these risks, there has been renewed investments and innovations in endpoint and network security, increased efforts to automate threat detection, especially using AI-driven threat intelligence, as well as an effort to prepare for the future by reinforcing encryption algorithms, in particular the growing interest into Post-Quantum Cryptography to protect against the next expected disruption: quantumcomputing threats. This shift marks a broader transformation in how businesses approach security and build trust in their increasingly autonomous systems.



Trend 3: AI-driven robotics: Blurring the lines between humans and machines



Advancements in AI technology have accelerated the development of next-generation robots, building upon innovations in mechatronics and expanding beyond traditional industrial uses. While robotics used to be dominated by hardcoded, task-specific machines, the development of Gen AI is spurring the development of new products (including humanoid robots and collaborative robots – or cobots) that can adapt to diverse scenarios and learn continuously from their environment. According to the Capgemini Research Institute's upcoming report, 24% of top executives and 43% of Venture Capitalists see Al-driven automation and robotics as one of the top 3 tech trends in data and AI in 2025. With robots becoming more autonomous and AI taking on complex decision-making roles, the future of work may see a shift in the traditional structure of authority. The rise of Al-powered machines that mimic human behaviors challenges our understanding of leadership, responsibility, and collaboration, ultimately pushing us to reconsider the role of humans.







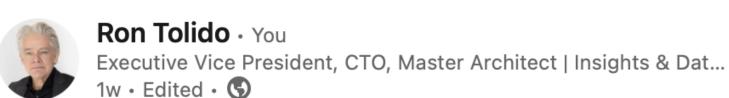
The energy industry is in the midst of a transformative shift, with the energy transition accelerating at an unprecedented pace. This change is fuelled by mounting pressure to fight climate change and supported by rapid innovations across various sectors, from renewables and biofuels to low carbon Hydrogen and beyond. Nuclear energy stands out as a focal point for 2025: nuclear is re-emerging at the top of the business agenda, propelled by the urgent need for clean, dependable and controllable power that can support the rising energy demands of AI and other high-energy technologies. Although in September/October 2024, very few top execs globally identified Small Modular Reactors (SMRs) as a top 3 Sustainability technology for 2025, SMR technology development is expected to accelerate by 2025, and other key innovation priorities include strides toward limitless, clean power with nuclear fusion, or Advanced Modular Reactors that differ from light water reactors in the use of new types of fuels and a higher temperature and for some of them the promise to reduce the production of nuclear waste.

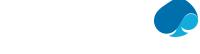




In the last few years, businesses have had to navigate increasingly complex, unpredictable market conditions. Key technologies including AI, data, blockchain, IoT and connectivity with Terrestrial Satellite Networks are now playing a strategic role in improving the cost efficiency, resilience, agility, circularity, and sustainability of supply chains. These technologies are allowing companies to enhance their predictive capacities and navigate an ever-changing ecosystem as they have now reached a sufficiently high level of maturity and therefore reliability. Meanwhile, progress in space techs such as low-earth orbit satellite constellations is particularly essential to increase coverage in white spots which is crucial for companies to be able to control their entire supply chains throughout the globe. In fact, according to the Capgemini Research Institute's upcoming report, 37% of top executives see these new-generation supply chains powered by technologies as the top tech trend in industry and engineering in 2025. Additional regulatory and environmental constraints will make this shift all the more critical to ensure competitiveness, agility and resilience.





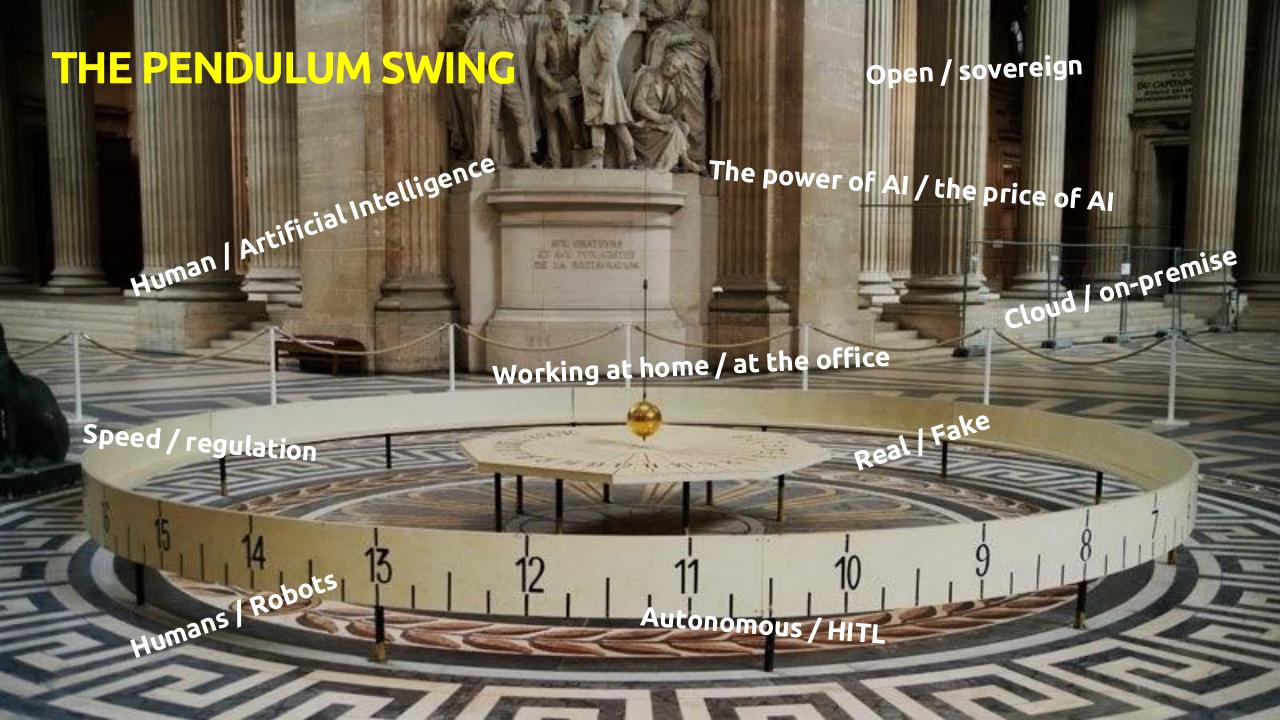


Yes, it's that time of the year! We are in the process of finishing the full CIO/CTO version of **#TechnoVision** 2025, to be published in January 2025. Each edition has a major theme, which reflects our take on ...more

What will the theme of TechnoVision 2025?

You can see how people vote. Learn more

we AUGMENT!	29%
The Pendulum Swing	21%
The Politics of Balancing	11%
Al Aftershocks	39%







NO EXPERIENCE

Generative AI and immersive technologies bring controller-less interactions and the merger of the physical and virtual world, leading to a natural, intuitive, and stress-free experience of technology; like there is no experience at all

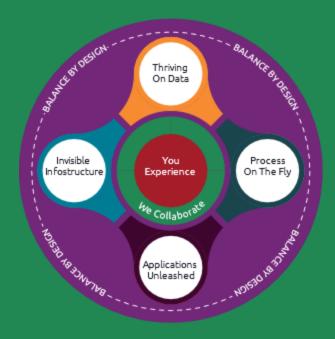
What if technology could just 'get' what we want, without needing to use 2D touchscreens, buttons, and controllers? What if we could just talk, look, point, and gesture in our digital multiverse, just like we interact in the real world, and move seamlessly between them? High-quality rendering, powerful real-time graphics engines, and immersive displays make us feel physically present in virtual worlds, and vice versa. Combined with the power of Generative AI, these technologies unleash a 'No Experience'. We'll be guided by AI-powered, multi-talent virtual agents – only a few words or a gesture away – that understand our preferences and personalities. They'll deliver personalized experiences, services, insights, and actions, seamlessly blended into our 'real' lives. A no-brainer indeed.



Scan to read more







MY IDENTITY, MY BUSINESS

THE TEAM IS THE CANVAS

YOUR BUSINESS IS A MESH

ECONOMY OF THINGS

In a world where collaboration feels like an exciting Star Trek voyage, it's now supercharged with advancements in AI and distributed technologies. It augments the competencies of both individuals and entire organizations. Collaboration may not be intuitive, or even complex to many, but great synergies create new ways of working and new business models.

And now, innovative technology is augmenting collaboration itself, reimagining creativity with speed and scale. Who would have thought of pair programming, collaborating with a machine, rather than a human? Or of exchanging both physical and virtual assets in real-time? The scope of collaboration is indeed expanding rapidly between humans, humans to machines, and increasingly machines to machines.

This puts the notion of a digital, decentral identity center stage — together with open standards, intelligent automation, and regulatory foundations — all creating a human beacon of trust in a networked reality that's perpetually on the move.



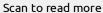


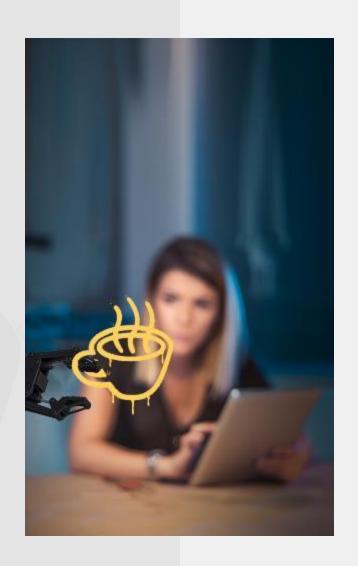
YOUR BUSINESS IS A MESH

Enabled by efficient decentral 'mesh' technology, it's easier than ever for organizations to join forces, even if it is lightweight, just for one day, for one occasion, or for one customer

Caught in a mesh? Businesses can no longer just be digital but must become living, learning, and adaptive. With an augmented enterprise, agile applications, big data capabilities, and hyperconnectivity, it is easier and more efficient than ever to collaborate with others — even if they come from unexpected sides. Thriving, always-changing ecosystem-based business models can drive unique products, services, and customer experiences that were deemed unlikely or impossible before, crossing the barriers of sectors, industries, and regions. Mesh collaboration enables businesses to see, predict, and adapt to market needs in real time; ensuring intelligence and empathy by integrating people, devices, and services to drive efficiency. Exactly the rumble organizations are looking for.







Decentralized - Resilient - Adaptable to Change Mesh Network **Service Mesh** • **Data Mesh**









PADMASHREE SHAGRITHAYA EXPERT IN RESIDENCE

POWER TO THE PEOPLE

A growing scarcity of specialized skills, the need to activate data as close to the business as possible — plus powerful AI and automation tools — are all driving the unstoppable self-service data revolution

Time to fight the central power! Within a true Technology Business, everyone can take the role of data scientist or data engineer. Data-powered operations may only be a chat away. Powering by data happens best in the closest proximity to the business, at the very edges of central IT and data departments. But the right skills are becoming rarer, and secure, high-quality access to the right data is just as difficult to find. Generative AI and intelligent automation bring easy-to-use, self-service tools that provide the power of data to more people. Self-service offloads the pressure on central delivery, deals with scarcity, and democratizes access and use of data. Something to push through the barricades for.











Generative AI enables individuals and organizations to express themselves creatively like never before while boosting productivity — but human oversight and guardrails are key

Talkin' 'bout my AI generation: it seems that almost overnight we have gotten accustomed to having productive and creative AI assistants available everywhere, helping us with a wide range of activities. Large Language Models excel in exactly what their name suggests: interpreting and producing 'language', whether it pertains to text, audio, video, images, test data, or program code. Combined with technology for (private) data retrieval and contextual navigation, Generative AI truly becomes a phenomenal augmentation force for the enterprise. But watch out for the AI 'generation gap': beautifully articulated language can perfectly mask the disinformation it may contain. Guardrails are a must, just as human oversight, wherever — and WHOever — appropriate.



Scan to read more





Multi-Modal, Multi-Model, Multi-Agent, Multi-Expertise





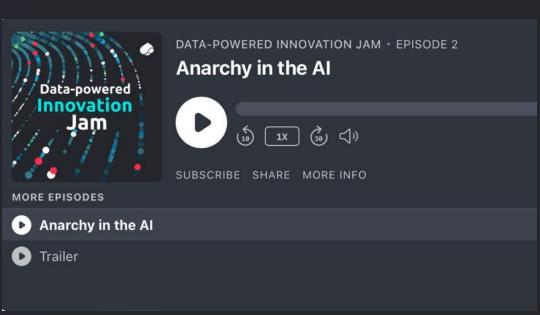


















AUTONOMOUS ENTERPRISE

Harnessing AI, the autonomous and unattended 'lights out' enterprise continually optimizes itself, bringing harmony and blending capabilities between humans and technology

Incorporating AI into the equation elevates mechanistic automation by not only enabling mimicry but also augmenting human intelligence. AI's proficiency in comprehending natural language, and deciphering audio, video, and images allows it to perceive processes within their broader context, uncovering intricate patterns beyond human perception. This AI-human combo not only jazzes up how we work but also fully reshapes our work processes and organizational structures, fundamentally altering the landscape of business operations and daily life. As AI continually optimizes the autonomous and unattended 'lights out' enterprise, it fosters harmony by blending the capabilities of humans and technology, creating a whole new synergy that propels us into a new era of innovation and corporate purpose.















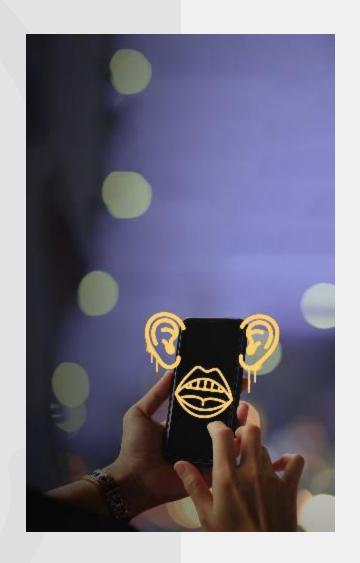
WHEN CODE GOES KNOW

Pair programming with an AI assistant can significantly boost coding productivity and quality while steepening your learning curve — if you know what you're doing

Know what? It was already getting easier to produce high-quality code, through API catalogs, prebuilt templates, automation, and powerful low/no-code systems. And now there is Generative AI, providing both professional and business developers with language models that can produce code as if it was written by the best software engineers on GitHub. It delivers productivity and quality and it's highly educational too. All of this is done through dialogue in plain, natural language. Exactly what an aspiring Technology Business needs. But beware, an experienced eye is always needed before releasing AI-generated apps. As the saying goes: you know it when you see it.













CHAT IS THE NEW SUPER APP

AI-augmented chatting and talking in plain, natural language becomes the new app to rule them all

It has been the ambition of quite a few captains of IT industry: creating one Super App that can be used to manage and launch whatever application service one could possibly need. But it would still be an app, with an interface that needs to be mastered and a logical flow that must be followed. What if all of that would simply disappear and be replaced by a simple dialog in natural language? The rapid breakthrough of AI-augmented chat systems, combined with an infinity of multimodal, subject matter-specific plug-in models, is making this a reality. It will democratize access to applications, driven by a radically new design concept for software engineers. Supercalifragilisticexpialidocious!





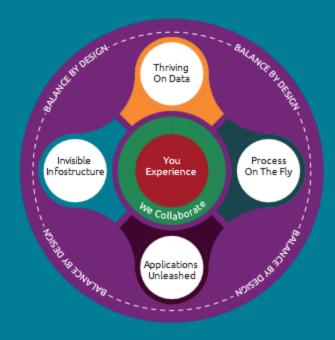
CHAT IS THE NEW SUPER APP











LORD OF THE CLOUDS

MY INDUSTRY, MY CLOUD

OPS, AI DID IT AGAIN

SIMPLY THE EDGE

OK QOMPUTE

The odyssey towards a truly invisible IT infrastructure continues — and the sky is not the limit anymore.

The cloud, a signpost of increasing 'invisibility' is the default choice with a mixed range of deployment options. Acceleration technologies boost early value, sustainability, industry contextualization, technology debt removal, and security — all this while maintaining operational resilience.

Al-powered autonomy is key, providing an augmented approach to deal with the scarcity of skilled experts, reduction of CO2 emissions, and the staggering complexity of IT operations.

But there's the 'infostructure' side of IT infrastructure as well, bringing augmenting technology power closer to humans, 'things', and their surroundings.

And entering our atmosphere, we see new computing paradigms — such as quantum and neuromorphic — promising yet unheard-of innovation opportunities.





OK QOMPUTE

New horizons of more organic computing are emerging, driven by Quantum and neuromorphic chips — breaking the spell of bits and bytes, opening up entirely unexplored opportunities

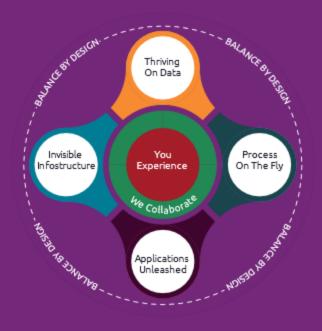
To address some of the most significant challenges of our time, such as improving healthcare and the race to net zero, there is a demand for much more computational power. With Moore's law finally outpaced, the time has come to explore alternative computing methods. Welcome to the realm of bits, neurons, and qubits. We have already moved beyond the classic CPU processor architecture—with GPUs, TPUs, NPUs, LPUs. But their roles will be shaken up by the new kids on the block—Quantum and neuromorphic chips. They operate on fundamentally different principles, more closely modeling our own, organic reality. That promises extraordinary, quite OK capabilities.



Scan to read more

Wole than Woole;





TECHNOLOGY ∈∋ BUSINESS

AI'LL BE THE JUDGE OF THAT

DO GOOD, DO LESS, DO WELL

BE LIKE WATER

IQ CQ RQ EQ UP

TRUST THRUST

NO HANDS ON DECK

The transformative, augmenting power of breakthrough technologies is obvious. With disruptive trends such as Generative AI, edge computing, and mixed realities now becoming operational at the enterprise level, we are witnessing more than ever how Technology Businesses can achieve their goals in new ways.

Goals that may have been considered unreachable or even impossible before.

But to get there, keeping multiple balances and adhering to design principles that consider the interests of all stakeholders is crucial in technology decisionmaking and implementation.

This is about finding a balance between short and long-term, centralized and decentralized, friendly and authoritarian, purposeful, and spontaneous, value-rich and frugal, expanding and sustainable, technology-powered and human-centered.

BALANCE BY DESIGN

OVERARCHING | TRANSFORMATIVE | PURPOSEFUL





Scan to read more





ALIASGAR MUCHHALA EXPERT IN RESIDENCE

NO HANDS ON DECK

THE PRINCIPLE

Assume full, hands-free, zero-touch automation as the default for all new Technology Business processes.

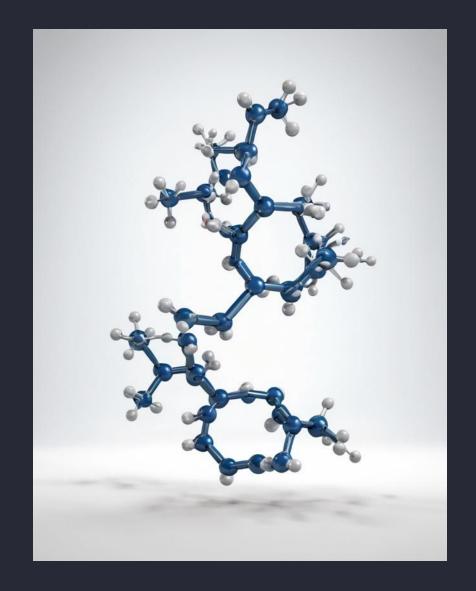
Advances in AI and intelligent process automation make us fundamentally challenge the human factor in any aspect of business, while the scarcity of human skills and resources adds a renewed sense of urgency to the pursuit. The immense possibilities drive us from automation to autonomy — dreaming of an entirely hands-free enterprise. But we should not move so fast — just yet. For now, let's benefit from autonomous technology: make it your first choice for all new processes and learn about a renewed 'hands-off-deck' approach, by not doing. However, organizations must take their RQ (Robotic Quotient) as an organizational, leadership, change-management, and cultural measure of readiness for automation into account.





Engineering biology: bio solutions to today's most pressing challenges

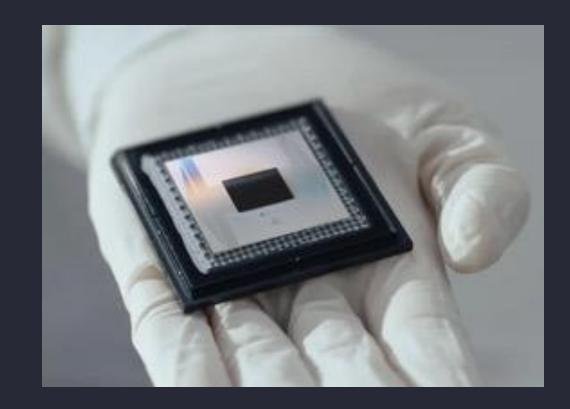
While the potential of engineering biology and its ability to transform manufacturing, develop drugs and produce materials with novel properties has been widely discussed over the past years, this technology is yet to reach its scaling phase. According to the Capgemini Research Institute's upcoming report, 41% of top executives believe that molecular assembly will reach maturity and become commercially viable by 2030. Meanwhile, 37% of them envision the same for Genomic Therapies. In the coming years, we can look forward to new innovations in this diverse field, such as personalised mRNA vaccines and GenAI for protein design.





Quantum computing: on the verge of the quantum leap

According to the upcoming Capgemini Research Institute survey, 55% of top executives and 44% of VCs expect quantum computing to be one of the top 3 technologies within the 'Computing & Networking' space which will create a major impact in 2025. 41% of top executives expect to be experimenting with quantum computing Proofs of Concepts with limited use cases, and 27% of the top executives surveyed expect the technology to be partially scaled in some parts of the organization in 2025. The key question is – when will the quantum leap happen, and who will master it?





Artificial General Intelligence: I think, therefore AI am?

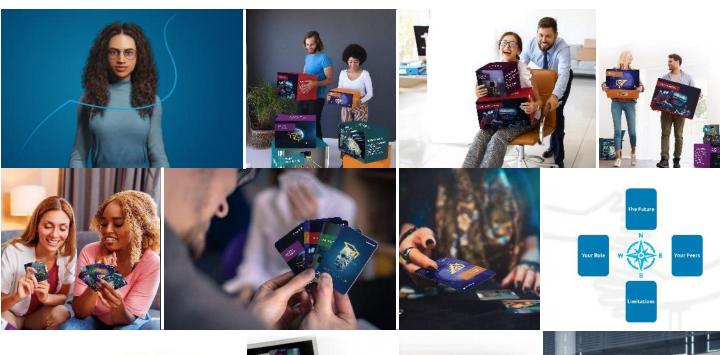
Al reasoning capabilities have made spectacular progress over the past 5 years, and some predict an era of artificial general intelligence (AGI). As such, 60% of top executives and 60% of VCs surveyed by the Capgemini Research Institute believe this technology will reach maturity and become commercially viable by 2030. Would this technology basically be able to mimic human intelligence to the point of making it irrelevant? This topic leads to exaggerated predictions, and some now question whether the intelligence potential of the technology is really unlimited.





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Card deck: Pick a card

Pick a card, any card. Outside of the world of witchcraft and wizardry, this old magician's trick is a good one. Perfect for those discovering TechnoVision for the first time, or who would like to delve deeper into a specific container or trend, our colorful deck can guide the way, and see what takes your fancy.

Who's it for?

Anyone. If you can get hold of some cards, you can play it.

Preparation

On a large flat surface (floor or table comes to mind), lay the cards out – face up – grouped in their containers.

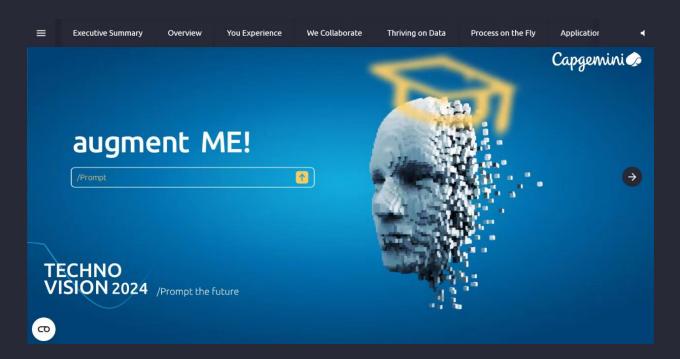
The format

Don't explain TechnoVision. Just ask all participants to have a brief look at the display of TechnoVision cards and choose a card that – on its title alone – intuitively matches their interests or ambitions. Ask every participant to give an elevator pitch on why they selected a particular card and if applicable, what personal next step they assign to it. Take a picture of every individual showing their card.

Finally, take a group picture. Distribute to all participants for later reference.

Ways to experience TechnoVision









Two reports:

- https://www.capgemini.com/insights/research-library/technovision-2024-prompt-the-future/
- https://www.capgemini.com/insights/research-library/technovision-2024-trends-for-business-decision-makers/

A responsive online site:

- https://technovision.capgemini.com/prompt-the-future/
- https://www.capgemini.com/insights/research-library/technovision-2024-applying-technovision/

Plus, other opportunities:

https://www.capgemini.com/insights/research-library/technovision-2024-applying-technovision/









Data for augmentation

RAISE helps organizations move from 6 exploration to results 2024 is the year for scaling AI Weiwei Feng, Capgemini

Extending how we interact with technology The Generative AI Lab's triple quest for efficiency, synergy, and precision Robert Engels, Capgemini

Knowledge graphs improve GenAl Validating results builds trust for organizations Tomaz Bratanic, Capgemini Magnus Carlsson, Capgemini Joakim Nilsson, Capgemini

Al is more than ML Bringing knowledge into the spotlight Veronika Heimsbakk, Capgemini

	Al must pay attention to make human- like decisions	
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Powering the generative economy

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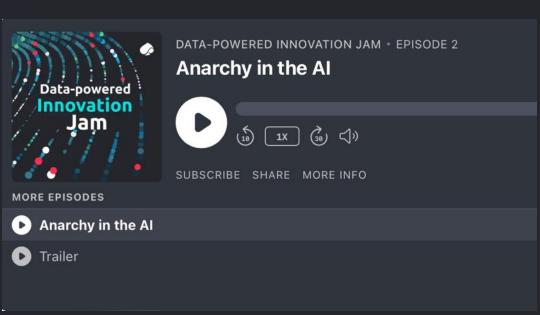
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Ron Tolido, CTO, Capgemini Insights & Data global business line