

TRON

Human enters the machine

crossing the boundary between the physical world and the digital world.

Programs become people

(AI) Agents are living characters with identity, loyalty, fear, and purpose.

Control versus freedom

Systems becoming too powerful and users fighting back against digital oppression.

Technology reflects its creator

The digital world is shaped by human (BigTech) ambition, ego, creativity, and mistakes.

The End-User still matters

Human autonomy inside a world increasingly ruled by (AI) machines.

Two EUC Veterans
One Uncomfortable Truth

The Future of EUC

Ready for Disruption?!

The END of User Computing?

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Hej!



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Topics

- Disruption, Resilience and Opportunities
- Sovereignty in EUC
- Current EUC Developments and the End of User Computing

Disruption

A situation in which it is difficult for something to continue in the normal way.

The act of stopping something from continuing in the normal way.



Disruption happens

Geopolitical shifts, M&A, bankruptcies, tariffs, regulation, and new technologies like EVs, robotics, SaaS, cloud, and AI.

Technology moves faster than most organizations can respond.

Welcome to the real world.

Don't just blame the company. Blame the system.

Don't like change?

Better build and train your adaptability muscle (or find another job)

Disruption is uncomfortable.

It can bring uncertainty, risk, pain, higher costs, and a potential drop in user experience.

That is why we try to avoid it. But avoidance does not stop disruption.

So where is the urgency?

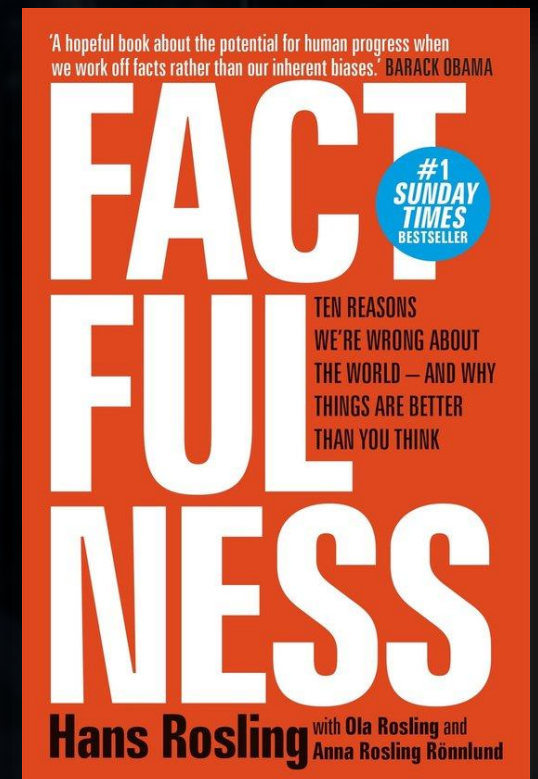
SCIENCE



IDEOLOGY



- Facts vs gut feeling.
- Context beats lazy conclusions.
- EUC has too many opinions dressed up as facts. Old experiences from a different era or facts?
- EUC is full of strong opinions:
 - “RDP is terrible.”
 - “Cloud is too expensive.”
 - “Users will never accept this.”
- Data matters - Science matters - Context matters.
- A fact without interpretation is just noise.
- Facts are real, they are just not always simple.





When ideology beats evidence, change slows down.

There is always a reason why change will not work:

- Too risky, too expensive
- Users will never accept it...
- We tried this before, this is not how we do things here

Sometimes it is a valid concern, sometimes it is the status quo defending itself.

Do you know the scary part?

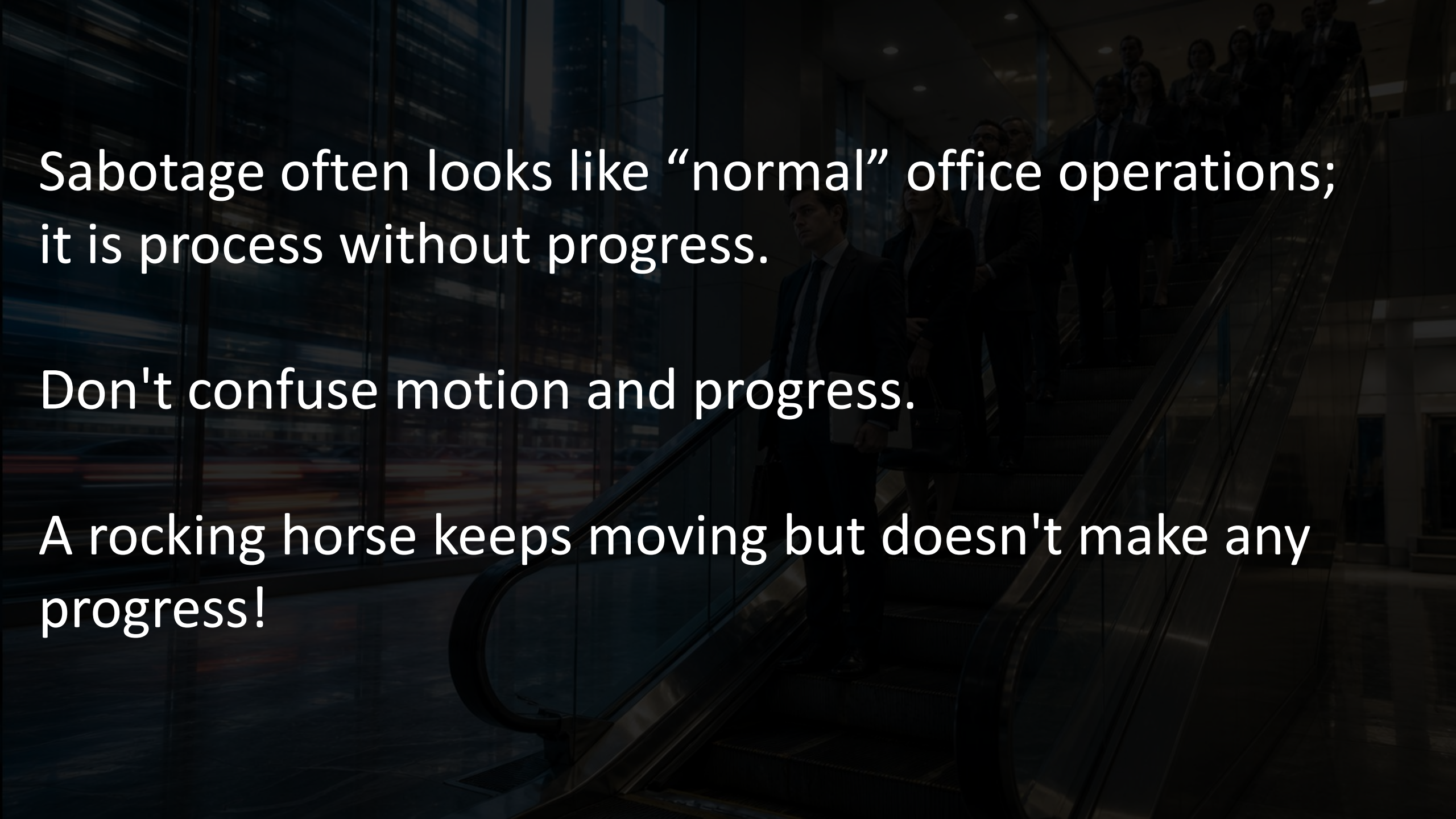
Simple Sabotage Field Manual

(1940s)



Many IT organizations unintentionally follow the Simple Sabotage Field Manual

- Do everything through official channels
- Refer decisions to committees
- Bring up irrelevant issues
- Talk and document at length
- **Reopen decisions already made**
- Misunderstand orders and ask endless questions
- Always do the unimportant jobs first
- Insist on perfect work in relatively unimportant products
- **Spread disturbing rumors**
- Work slowly and poorly



Sabotage often looks like “normal” office operations;
it is process without progress.

Don't confuse motion and progress.

A rocking horse keeps moving but doesn't make any
progress!

INVESTOR

EXECUTIVE

EMPLOYEE

“LEADERSHIP”

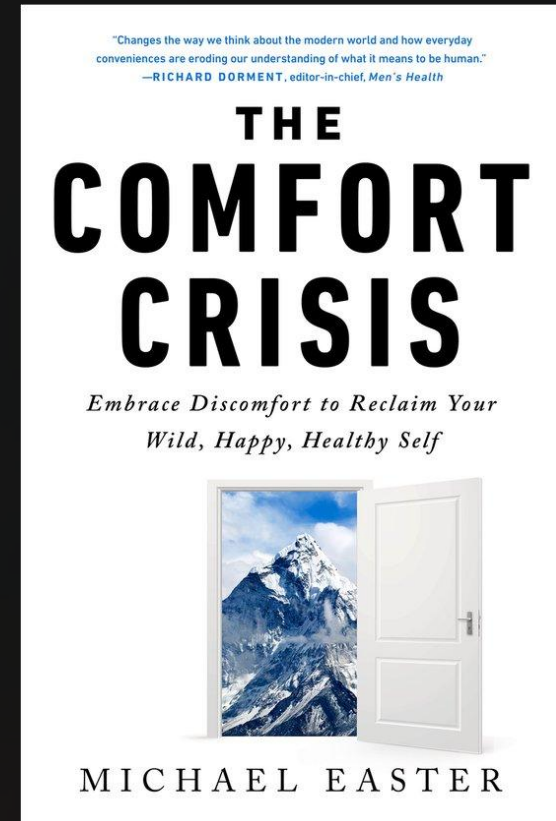
Change is uncomfortable and it is a massive opportunity

- New opportunities do not usually feel efficient at first.
- They cost time.
- They require thinking.
- They involve trying, failing, learning, and spending money before the value is visible.
- That is why you, I, we love comfort.
- Comfort is not a strategy. It is a delay mechanism

Change can create new business, new partnerships, differentiation, flexibility, resilience, and a future-proof organization.

The hard part is not seeing the opportunity.
The hard part is leaving the comfort zone.

Tip: great read = Comfort Crisis, Michael Easter



How to prepare and succeed for disruption?

1. Build personal resilience: mindset, health, energy, adaptability
2. Build family resilience: support, planning, finances, routines
3. Build job resilience: skills, relevance, visibility, reputation
4. Build work resilience: processes, documentation, tools, backup plans
5. Build company resilience: strategy, people, technology, cash flow
6. Build country resilience: community, trust, infrastructure, energy, security, digital autonomy

Digital autonomy is the freedom to choose.
Digital sovereignty is the power to control.



Monoculture

PROS

Increased productivity and efficiency

Specialized Production

Yields Maximization

Easier To Manage

Higher Revenues

CONS

Pests Management

Higher Pesticides Use

Soil Degradation And Fertility Loss

Higher Use Of Fertilizers


Higher Water Use

Decrease In Biodiversity

Impact On Pollinators

Economic Risks

Environmental Impacts Of Monoculture



EUC monoculture:
Convenient, efficient... and risky?

Disruption

A situation in which it is difficult for something to continue in the normal way.

The act of stopping something from continuing in the normal way.



Trust

Earned slowly ...
and lost quickly.



KILL-SWITCH

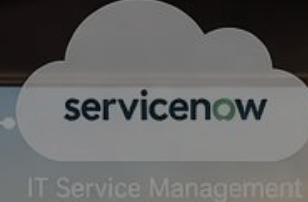
EMERGENCY SHUTDOWN

KILL



PRESS ONLY IN
CRITICAL SITUATIONS





**YOU CHOOSE
THE DIRECTION**

**Digital sovereignty is the ability to control
your own digital environment, data,
platforms, and strategic choices**



aws
Cloud Infrastructure

servicenow
IT Service Management

Microsoft Azure
Cloud Platform

workday.
HR & Finance

Google Cloud
Data & Analytics

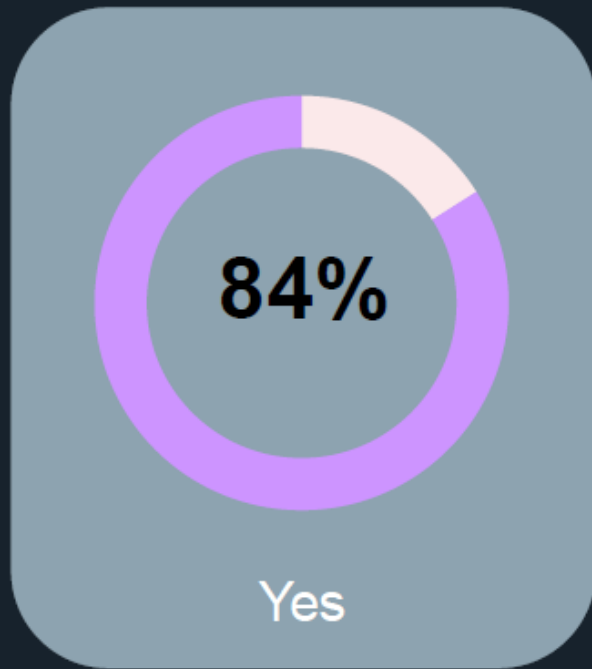
salesforce
CRM

**YOU CHOOSE
THE DIRECTION**

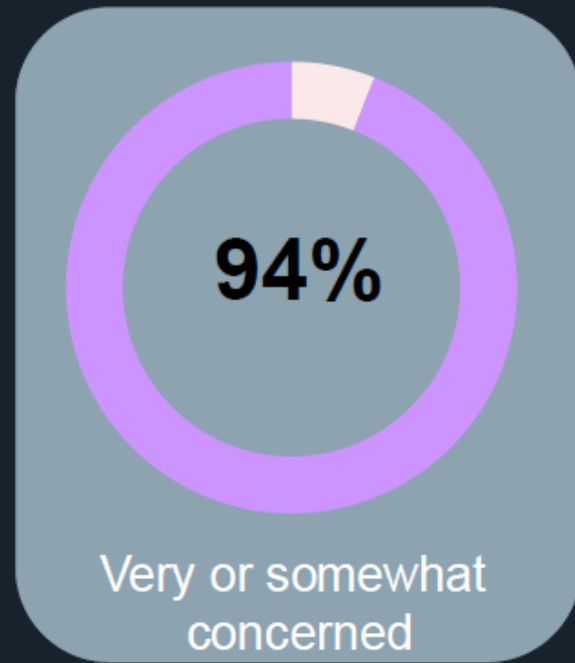
**Why is Sovereignty (more) important
today?**

Sovereignty

Is your organization
concerned about data
sovereignty?



How concerned is your organization
about becoming locked into a single
vendor for EUC/VDI/DaaS?



Sovereignty

Is your organization concerned about data sovereignty?

How concerned is your organization about becoming locked into a single vendor for EUC/VDI/DaaS?

“Organizations across European and US regions are very **concerned** about data sovereignty and single vendor lock-in.”

84%
Yes

34%
Very or somewhat concerned



aws
Cloud Infrastructure

servicenow
IT Service Management

Microsoft Azure
Cloud Platform

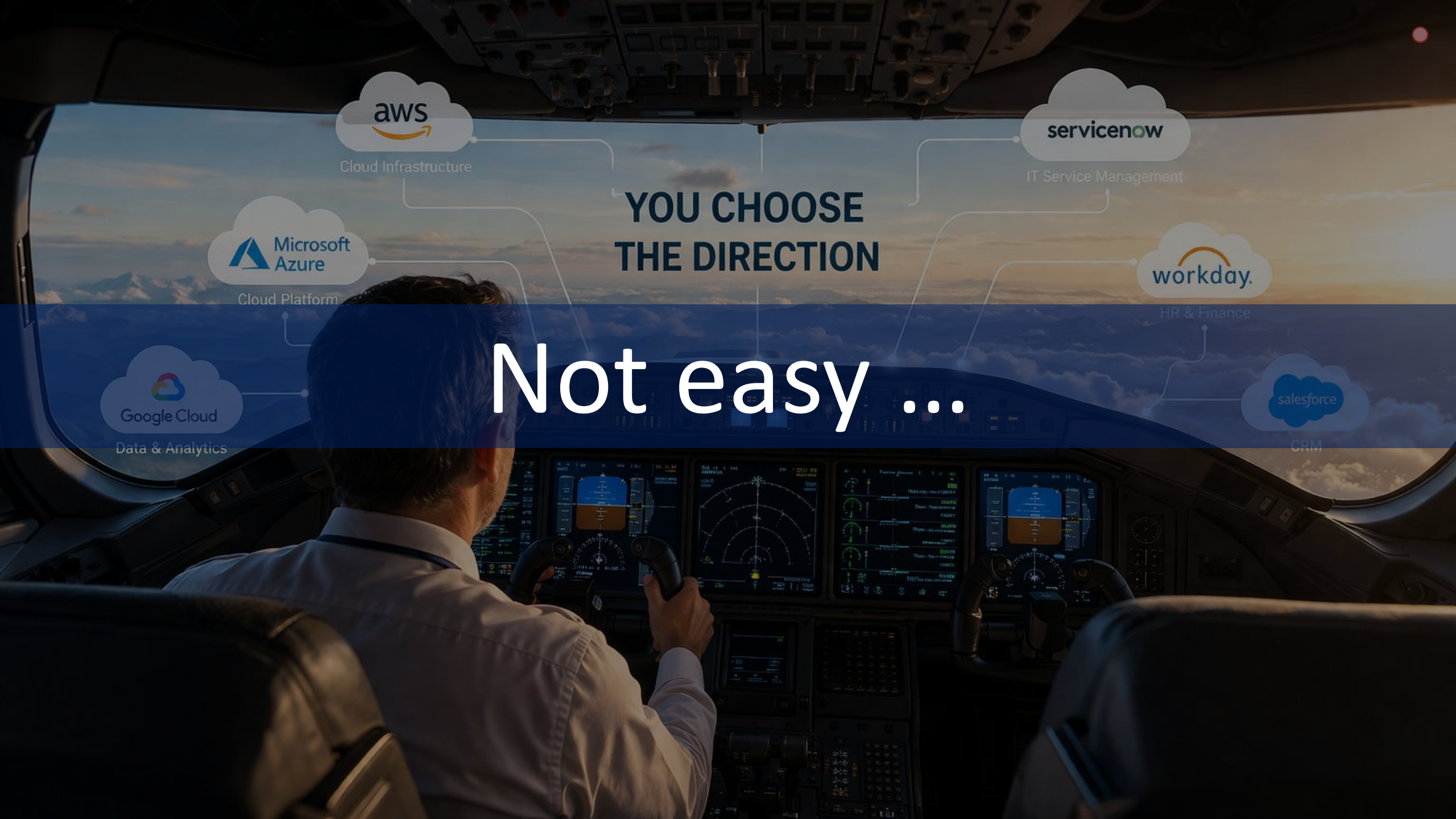
**YOU CHOOSE
THE DIRECTION**

workday.
HR & Finance

Google Cloud
Data & Analytics

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CRM

Sovereignty in an America First World: Regaining Control, Choice, and Resilience



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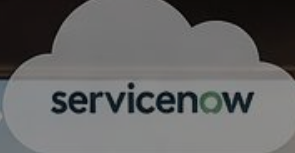
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**YOU CHOOSE
THE DIRECTION**

Not easy ...



aws
Cloud Infrastructure



servicenow
IT Service Management



Microsoft
Azure
Cloud Platform



workday.
HR & Finance



Google Cloud
Data & Analytics



salesforce
CRM

**YOU CHOOSE
THE DIRECTION**

**Decades of features, knowledge, and
habits cannot be replaced overnight**

Microsoft Products & Services

Empowering every person and every organization on the planet to achieve more

Microsoft	PRODUCTIVITY & COLLABORATION	BUSINESS APPLICATIONS	CLOUD & INFRASTRUCTURE	SECURITY	WINDOWS & DEVICES	DEVELOPER & IT TOOLS	GAMING	LINKEDIN
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	<ul style="list-style-type: none"> Risk management Fraud protection Regulatory compliance Customer insights 	<ul style="list-style-type: none"> Patient engagement Healthcare analytics Research & discovery Operational efficiency 	<ul style="list-style-type: none"> Unified commerce Customer experiences Inventory management Store operations 	<ul style="list-style-type: none"> Citizen services Digital transformation Security & compliance Smart communities 	<ul style="list-style-type: none"> Digital learning Classroom collaboration Student outcomes Campus management 	<ul style="list-style-type: none"> Asset performance Sustainability Field operations Market insights 	<ul style="list-style-type: none"> Network modernization Customer experience Monetization Operations support 	<ul style="list-style-type: none"> Content creation Audience engagement Monetization Digital experiences 	<ul style="list-style-type: none"> Donor engagement Program management Fundraising Impact measurement 	<ul style="list-style-type: none"> Client engagement Project operations Resource management Business insights

PLATFORMS & SERVICES	Microsoft Viva	Microsoft Copilot	Bing	Microsoft Edge	Microsoft Advertising	Skype	OneDrive	Microsoft 365 Copilot	Clarity	Microsoft Start	Translator	Microsoft 365 Admin	Marketplace	Support
	Employee experience platform	Your AI assistant across Microsoft	Search engine & answers	AI-powered web browser	Intelligent ads & solutions	Connect globally	Cloud storage & sharing	AI for work productivity	User behavior insights	Personalized news & content	Break language barriers	Manage users, devices & apps	Apps, services & solutions	Help & support when you need it

AI & INNOVATION	DATA & ANALYTICS	MODERN WORK	APP INNOVATION	HYBRID & MULTI-CLOUD	IDENTITY & ACCESS	COMPLIANCE & GOVERNANCE	SUSTAINABILITY
<ul style="list-style-type: none"> Azure AI Platform Build AI solutions Azure OpenAI Service Enterprise-grade AI models Cognitive Services Pre-built AI APIs Machine Learning Build, train & deploy models AI Builder AI for Power Platform 	<ul style="list-style-type: none"> Microsoft Fabric Unified analytics platform Azure Synapse Analytics Analytics at scale Azure Data Lake Big data storage Power BI Business intelligence SQL Server Data platform 	<ul style="list-style-type: none"> Viva Connections Employee communication Viva Engage Community & engagement Viva Insights Wellbeing & productivity Viva Learning Learning & growth Microsoft Teams Rooms Smart meeting spaces 	<ul style="list-style-type: none"> Azure App Service Build web & mobile apps Azure API Management Manage & secure APIs Azure Logic Apps Workflow automation Azure Service Bus Messaging platform Azure Spring Apps Enterprise Java apps 	<ul style="list-style-type: none"> Azure Stack HCI Hyperconverged infrastructure Azure Stack Hub Hybrid cloud platform Azure VMware Solution Run VMware on Azure Azure Lighthouse Manage at scale Azure Migrate Simplify migration 	<ul style="list-style-type: none"> Microsoft Entra ID Identity & access Privileged Identity Management Secure privileged access Microsoft Entra Verified ID Decentralized identity Conditional Access Access controls Passwordless Passwordless authentication 	<ul style="list-style-type: none"> Microsoft Purview Data governance eDiscovery Investigations & legal holds Audit Audit & reporting Data Loss Prevention Protect sensitive data Retention Data retention policies 	<ul style="list-style-type: none"> Microsoft Cloud for Sustainability Sustainability management Carbon Management Track & reduce emissions Sustainable Operations Cloud efficiency Sustainability Insights Data-driven insights Partner Network Solutions for impact

TRUSTED BY DESIGN	Security	Privacy	Compliance	Transparency	Accessibility	Reliability	Responsible AI	Sustainability
	End-to-end protection built in	You own your data	Global standards & certifications	Accountability you can trust	Technology for everyone	Dependable cloud you can count on	Ethical AI by design	Committed to a sustainable future

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Compute	Containers	Storage	Databases	Networking	AI + Machine Learning	Analytics	Integration	Security	Identity
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Management + Governance					Developer Tools		IoT	Hybrid + Multi-Cloud	
<ul style="list-style-type: none"> Azure Portal Azure Mobile App Azure Cloud Shell Azure Advisor 	<ul style="list-style-type: none"> Azure Monitor Azure Streamzart Azure Resvce Health Azure Update Manager 	<ul style="list-style-type: none"> Azure Resource Azure Policy Hedges Azure Migrate 	<ul style="list-style-type: none"> Azure Cost Management + Billing Azure Resource Graph Azure Lighthouse Azure Arc 	<ul style="list-style-type: none"> Azure Lighthouse Azure Site Recovery Azure Capacity Reservation Azure Deployment Environments Azure Chaos Studio 	<ul style="list-style-type: none"> Visual Studio Visual Studio Code Azure SDKs Azure CLI 	<ul style="list-style-type: none"> Azure PowerShell Azure DevOps GitHub Actions for Azure Azure Developer CLI 	<ul style="list-style-type: none"> Azure IoT Hub Azure IoT Central Azure IoT Edge Azure Digital Twins Azure Sphere 	<ul style="list-style-type: none"> Azure Arc Azure Stack HCI Azure Stack Edge 	<ul style="list-style-type: none"> Azure Stack Hub Azure VMware Solution Azure Virtual Desktop
Media	Migration	DevOps	Application Services	Enterprise Integration	Data & AI Governance	Edge	Virtual Desktop	Blockchain	Industry Solutions
<ul style="list-style-type: none"> Azure Media Services Azure CDN Azure Communication Services Azure Live Video Analytics 	<ul style="list-style-type: none"> Azure Migrate Azure Database Migration Service Azure Data Box Azure Storage Mover 	<ul style="list-style-type: none"> Azure DevOps Services GitHub Actions for Azure Azure Pipelines Azure Repos Azure Test Plans Azure Artifacts 	<ul style="list-style-type: none"> App Service API Management Azure SignalR Service Azure Notification Hubs Azure Web PubSub Azure Spring Apps 	<ul style="list-style-type: none"> Azure Logic Apps Azure Service Bus Azure Event Grid Azure Synapse Analytics 	<ul style="list-style-type: none"> Microsoft Purview Azure Data Catalog Azure Information Protection Azure Data Share 	<ul style="list-style-type: none"> Azure IoT Edge Azure Stack Edge Azure Stack Hub Azure Percept 	<ul style="list-style-type: none"> Azure Virtual Desktop Windows 365 RemoteApp 	<ul style="list-style-type: none"> Azure Blockchain Service Quorum on Azure 	<ul style="list-style-type: none"> Microsoft Cloud for Healthcare Microsoft Cloud for Financial Services Microsoft Cloud for Retail Microsoft Cloud for Nonprofit Microsoft Cloud for Manufacturing Microsoft Cloud for Sustainability

SaaS
Hundreds of SaaS applications

Marketplace
Thousands of third-party apps and services

Templates
QuickStarts, templates, and samples

Documentation
Extensive documentation and learning paths

Support
Plans and support for every need

Regions
Available in 60+ regions worldwide

Trust Center
Security, compliance, and privacy

Explore all Azure services at azure.microsoft.com

AWS SERVICES

200+ fully featured services to build, deploy, and manage your applications in the cloud

Compute	Containers	Storage	Databases	Networking & Content Delivery	Developer Tools	Management & Governance	Security, Identity & Compliance	Analytics	Machine Learning
<ul style="list-style-type: none"> Amazon EC2 AWS Lambda AWS Auto Scaling Amazon EC2 Auto Scaling AWS Batch AWS Elastic Beanstalk AWS Lightsail AWS App Runner AWS Outposts Amazon Elastic Compute Cloud (EC2) AWS Fargate AWS Elastic Container Service AWS Elastic Kubernetes Service 	<ul style="list-style-type: none"> Amazon ECR Amazon ECS Amazon EKS AWS Fargate AWS App Mesh AWS Cloud Map AWS Service Discovery 	<ul style="list-style-type: none"> Amazon S3 Amazon EFS Amazon FSx Amazon S3 Glacier Amazon Storage Gateway AWS Backup AWS Elastic Disaster Recovery 	<ul style="list-style-type: none"> Amazon RDS Amazon Aurora Amazon DynamoDB Amazon ElastiCache Amazon Neptune Amazon Redshift Amazon QLDB Amazon DocumentDB Amazon Keyspaces (for Apache Cassandra) Amazon Timestream Amazon MemoryDB for Redis 	<ul style="list-style-type: none"> Amazon VPC AWS Transit Gateway Amazon Route 53 Amazon CloudFront AWS Direct Connect Elastic Load Balancing AWS Global Accelerator Amazon API Gateway AWS PrivateLink AWS Cloud Map 	<ul style="list-style-type: none"> AWS CodeCommit AWS CodeBuild AWS CodeDeploy AWS CodePipeline AWS Cloud9 AWS X-Ray AWS Tools & SDKs AWS Amplify AWS AppConfig AWS CodeCatalyst 	<ul style="list-style-type: none"> AWS Organizations AWS Control Tower AWS CloudFormation AWS CloudTrail AWS Config AWS OpsWorks AWS Service Catalog AWS Systems Manager AWS Trusted Advisor AWS License Manager AWS Well-Architected Tool AWS Health Dashboard AWS Chatbot 	<ul style="list-style-type: none"> AWS IAM Amazon Cognito AWS Identity Center AWS Secrets Manager AWS KMS AWS Certificate Manager AWS WAF AWS Shield Amazon GuardDuty Amazon Inspector Amazon Macie AWS Security Hub AWS Artifact 	<ul style="list-style-type: none"> Amazon Athena Amazon EMR Amazon Redshift Amazon Kinesis Amazon QuickSight Amazon OpenSearch Service AWS Data Pipeline AWS Glue AWS Lake Formation AWS Glue Studio AWS Data Exchange 	<ul style="list-style-type: none"> Amazon SageMaker Amazon Bedrock Amazon Rekognition Amazon Comprehend Amazon Forecast Amazon Textract Amazon Transcribe Amazon Polly Amazon Translate Amazon Personalize Amazon Lookout for Vision Amazon Lookout for Equipment Amazon CodeGuru

Application Integration	Customer Engagement	Business Applications	End User Computing	Internet of Things	Media Services	Migration & Transfer	Developer Productivity	Blockchain	Quantum Technologies
<ul style="list-style-type: none"> Amazon SQS Amazon SNS Amazon MQ AWS Step Functions Amazon EventBridge Amazon AppFlow Amazon SWF 	<ul style="list-style-type: none"> Amazon Connect Pinpoint Amazon Simple Email Service (SES) Amazon WorkMail Amazon Chime 	<ul style="list-style-type: none"> Amazon WorkSpaces Amazon AppStream 2.0 Amazon Chime SDK Amazon Honeycode 	<ul style="list-style-type: none"> Amazon WorkSpaces Amazon AppStream 2.0 Amazon WorkDocs 	<ul style="list-style-type: none"> AWS IoT Core AWS IoT Analytics AWS IoT Device Management AWS IoT Events AWS IoT Greengrass AWS IoT SiteWise AWS IoT Things Graph 	<ul style="list-style-type: none"> AWS Elemental MediaLive AWS Elemental MediaConvert AWS Elemental MediaPackage AWS Elemental MediaStore AWS Elemental MediaTailor AWS Elemental MediaConnect AWS Elemental DataFihrose AWS Elemental Video on Demand 	<ul style="list-style-type: none"> AWS Migration Hub AWS Application Migration Service AWS Database Migration Service AWS Server Migration Service AWS Transfer Family AWS Snow Family AWS DataSync 	<ul style="list-style-type: none"> AWS Cloud9 AWS CloudShell AWS Toolkits AWS SDKs & Tools 	<ul style="list-style-type: none"> Amazon Managed Blockchain AWS Blockchain Templates 	<ul style="list-style-type: none"> Amazon Braket

Industry Solutions	Edge Services	Observability	Cost Management	Sustainability	Global Infrastructure
<ul style="list-style-type: none"> AWS for Financial Services AWS for Healthcare AWS for Life Sciences AWS for Manufacturing AWS for Media & Entertainment AWS for Retail AWS for Telecommunications AWS for Energy AWS for Public Sector AWS for Nonprofits 	<ul style="list-style-type: none"> AWS CloudFront AWS Local Zones AWS Wavelength AWS Outposts AWS Snow Family 	<ul style="list-style-type: none"> Amazon CloudWatch AWS X-Ray AWS CloudTrail AWS Health Dashboard AWS Managed Services 	<ul style="list-style-type: none"> AWS Cost Explorer AWS Budgets AWS Marketplace AWS Compute Optimizer AWS Cost & Usage Report 	<ul style="list-style-type: none"> AWS Cloud Carbon Footprint Tool AWS Sustainability Dashboard AWS Energy Efficiency Guidance 	 <ul style="list-style-type: none"> AWS Regions 34 geographic regions AWS Availability Zones 108 availability zones Local Zones, Wavelength Zones, Outposts and Edge Locations around the world



Global Scale
Built for the world's most demanding workloads



Security
The most secure cloud computing environment



Reliability
Designed for 99.99% availability and fault tolerance



Performance
High performance at any scale



Innovation
Continuously adding new services and features

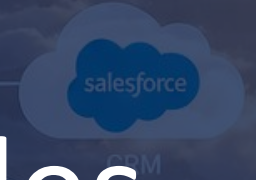
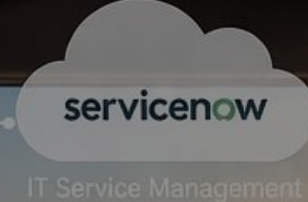


Support
Enterprise-grade support when you need it



Partner Network
Thousands of partners and solutions





**YOU CHOOSE
THE DIRECTION**

Dependency remains ...

**Hardware, Networking, DNS, Cables,
Satellite, ...**

Sovereignty tips

- Uncover the reality behind vendor claims
- Manage expectations:
 - Decades of features, knowledge, and habits cannot be replaced overnight
 - Costs up and UX down?!
- Create urgency
- Start with why
- Define the scope – ‘our crown jewels’
- Involve people early
- Build and maintain communities
- Plan, test, and validate
- Learn by doing and keep pushing!

EUC COMMAND CENTER

CLOUD PLACEMENT

Choose the right location for every workload



PUBLIC CLOUD

Scalable
Global reach



HYBRID CLOUD

Consistent
Connected



ON-PREMISES

Control
Compliance

WORKSPACE LANES

Standardized. Secure. Delivered.

CLOUD PC

My PC in the Cloud

Healthy

12,540

Active Users

98.5%

Success Rate



TOTAL

21,272

Active Users

PHYSICAL PC

Modern Management

Healthy

8,732

Active Users

97.1%

Success Rate

- Standard Images
- Policy Driven
- Auto-Updates
- Monitoring
- Security Baseline

DEX SCORECARD

Digital Employee Experience in real-time



Good

Device Performance 8.6

Network Performance 8.4

Application Performance 8.7

Login Experience 9.1

Collaboration Experience 8.5

Users Impacted
1,247 +12%

Issues Detected
72 +18%

EUC Developments

IDENTITY & DATA PROTECTION

Secure. Safe. Strong. Smart.



Risk Score

32

Medium Risk

Alerts 24

Identity Risks 17

Suspicious Sign-ins 9

Data Exfiltration Attempts 3

- Zero Trust Access
- MFA Enforced
- Conditional Access
- DLP Policies
- Encryption Enabled

WORKSPACE AI

Intelligent. Efficient. Secure.

- Microsoft 365 Copilot
- Anthropic Co-Work
- GitHub Copilot
- Service Copilot
- Knowledge Search
- Content Generation
- Process Automation
- IT Service Automation

AI

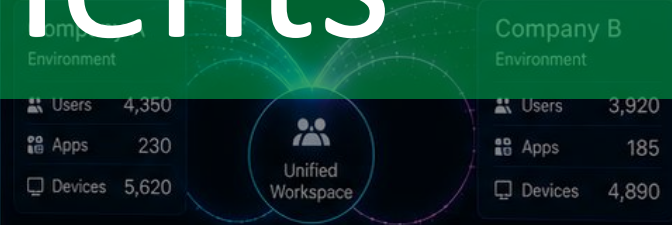
Adoption 68% +14%

Active Users 14,382 +16%

Interactions (7d) 215,674 +22%

UNIFIED WORKSPACE

One experience. Two environments. Limitless potential.



Company A Environment
Users 4,350
Apps 230
Devices 5,620

Company B Environment
Users 3,920
Apps 185
Devices 4,890

- Identity Consolidation
- App Harmonization
- Data Migration
- Policy Alignment
- User Communication
- Shared Services

GLOBAL OVERVIEW



Total Users 25,341 +8.7%

Active Devices 32,112 +6.3%

Total Apps 415 +3.2%

Service Health 99.2% Excellent

Security Posture Strong
No Critical Alerts

Compliance 98% On Track

RECENT ALERTS

- Unusual sign-in detected 2 min ago
- Impossible travel attempt 8 min ago
- Data exfiltration blocked 15 min ago
- Malware detected & quarantined 32 min ago

View All Alerts >

EUC COMMAND CENTER

CLOUD PLACEMENT

Choose the right location for every workload



PUBLIC CLOUD

Scalable
Global reach



HYBRID CLOUD

Consistent
Connected



ON-PREMISES

Control
Compliance

WORKSPACE LANES

Standardized. Secure. Delivered.

CLOUD PC
My PC in the Cloud

Healthy

12,540
Active Users

98.5%
Success Rate

PHYSICAL PC
Modern Management

Healthy

8,732
Active Users

97.1%
Success Rate



Standard Images



Policy Driven



Auto-Updates



Monitoring



Security Baseline

DEX SCORECARD

Digital Employee Experience in real-time



Good

Device Performance 8.6

Network Performance 8.4

Application Performance 8.7

Login Experience 9.1

Collaboration Experience 8.5

Users Impacted
1,247 +12%

Issues Detected
72 +18%

IDENTITY & DATA PROTECTION

Secure access. Stop threats.



Alerts 24

Identity Risks 17

Suspicious Sign-ins 9

Data Exfiltration Attempts 3



Zero Trust Access



MFA Enforced



Conditional Access



DLP Policies



Encryption Enabled

WORKSPACE AI

Intelligent workspaces. Smarter employees.

AI ASSISTANTS

- Microsoft 365 Copilot
- Anthropic Co-Work
- GitHub Copilot
- Service Copilot



AI WORKSTREAMS

- Knowledge Search
- Content Generation
- Process Automation
- IT Service Automation

Adoption
68% +14%

Active Users
14,382 +16%

Interactions (7d)
215,674 +22%

UNIFIED WORKSPACE

One experience. Two environments. Limitless potential.

Company A
Environment

Users 4,350
Apps 230
Devices 5,620

Company B
Environment

Users 3,920
Apps 185
Devices 4,890



Identity Consolidation



App Harmonization



Data Migration



Policy Alignment



User Communication



Shared Services

GLOBAL OVERVIEW



Total Users
25,341
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Active Devices
32,112
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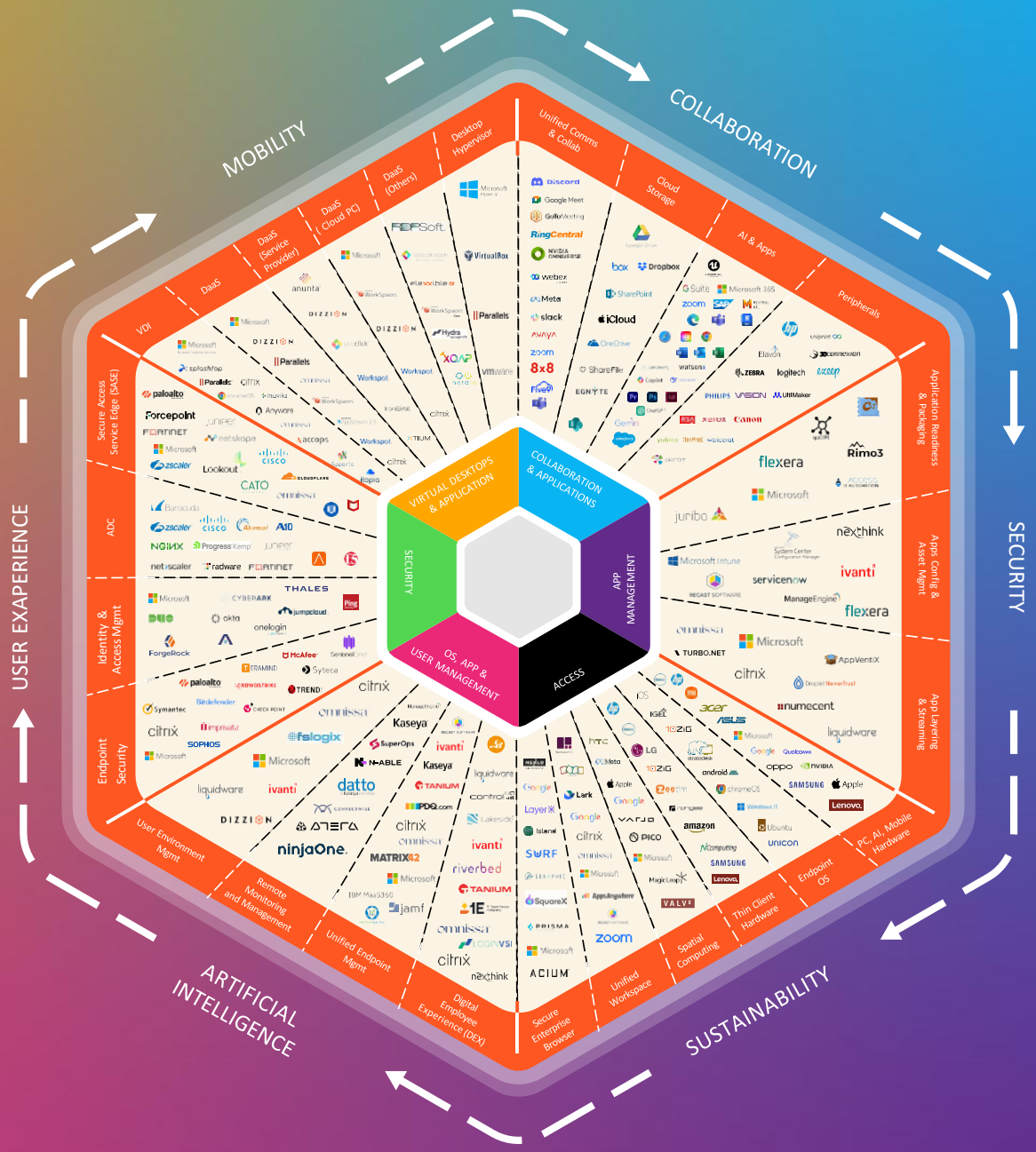
View All Alerts

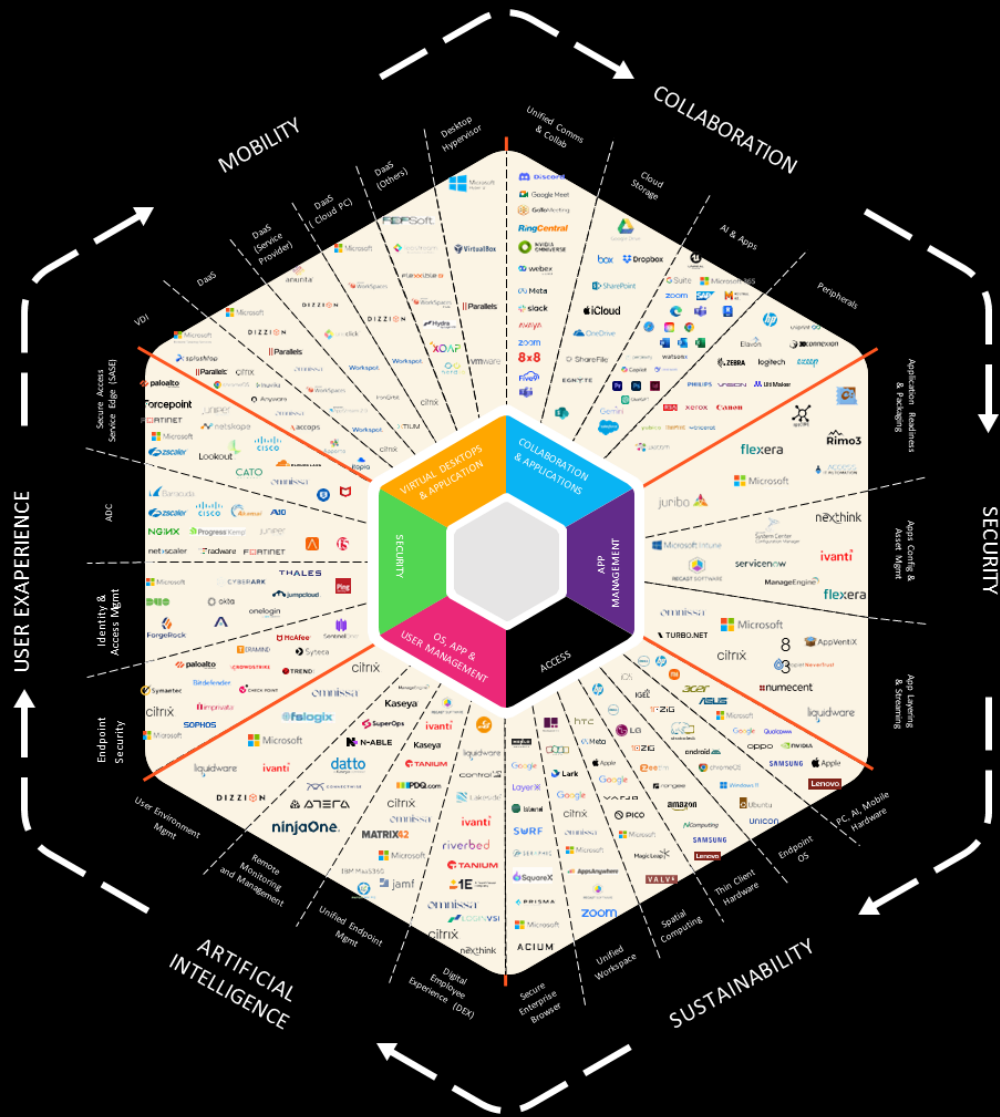


End User Computing: A **Complex** Ecosystem

It's not a single product or vendor,
and it's not like a turn-key solution.

EUC Hexagrid is a Framework for Navigating EUC Complexity





Infographic



Whitepaper

Cloud Placement

Apps Install Base

AVD Management

Endpoints

Digital Employee Experience (DEX)

Remoting Protocols

Workspace AI

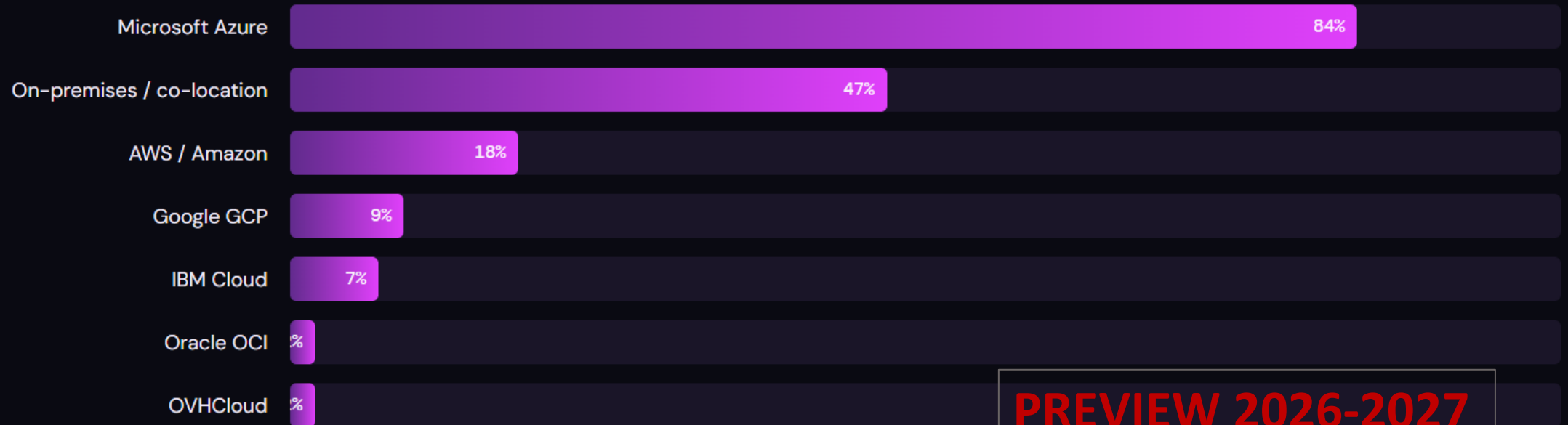
PUBLIC CLOUD
↑ ↑

HYBRID CLOUD
↑

ON-PREM
↗

Cloud Placement

Where workloads are hosted



PREVIEW 2026-2027

Key insight: Microsoft Azure is used by 84% of respondents — far outpacing all other clouds. On-premises/co-location (47%) is still very much alive as a hybrid layer. AWS (18%) and GCP (9%) have minimal DaaS presence. This reinforces why AVD and Windows 365 dominate the market-share chart.



Cloud Placement

Are you running workloads in the cloud?

Do you anticipate migrating workloads from the public cloud back to on-premises?

“Almost all organizations are running workloads in the public cloud, but a significant percentage of them is considering to migrate their workloads back to on-premises.”

SaaS Install Base

What % of applications are installed versus delivered as a service (SaaS)?

Over the past 12 months, how has the balance between installed applications and SaaS Changed

“Currently, more than 80% of global organizations have 50% or more installed Windows applications. SaaS is still in the minority.”

DaaS Adoption & Outlook

Are you currently using DaaS / Cloud PC?



● Currently using	82%
● Planning to implement	7%
● Considering alternatives	4%
● No plans	7%

Usage over the next 1–3 years



● Significantly increase	34%
● Moderately increase	27%
● Remain the same	25%
● Moderately decrease	14%

Moving workloads back to on-premises?



● Staying in the cloud	58%
● Partial hybrid model	20%
● Considering it	15%
● Full return on-prem	2%

Likelihood to recommend DaaS / Cloud PC

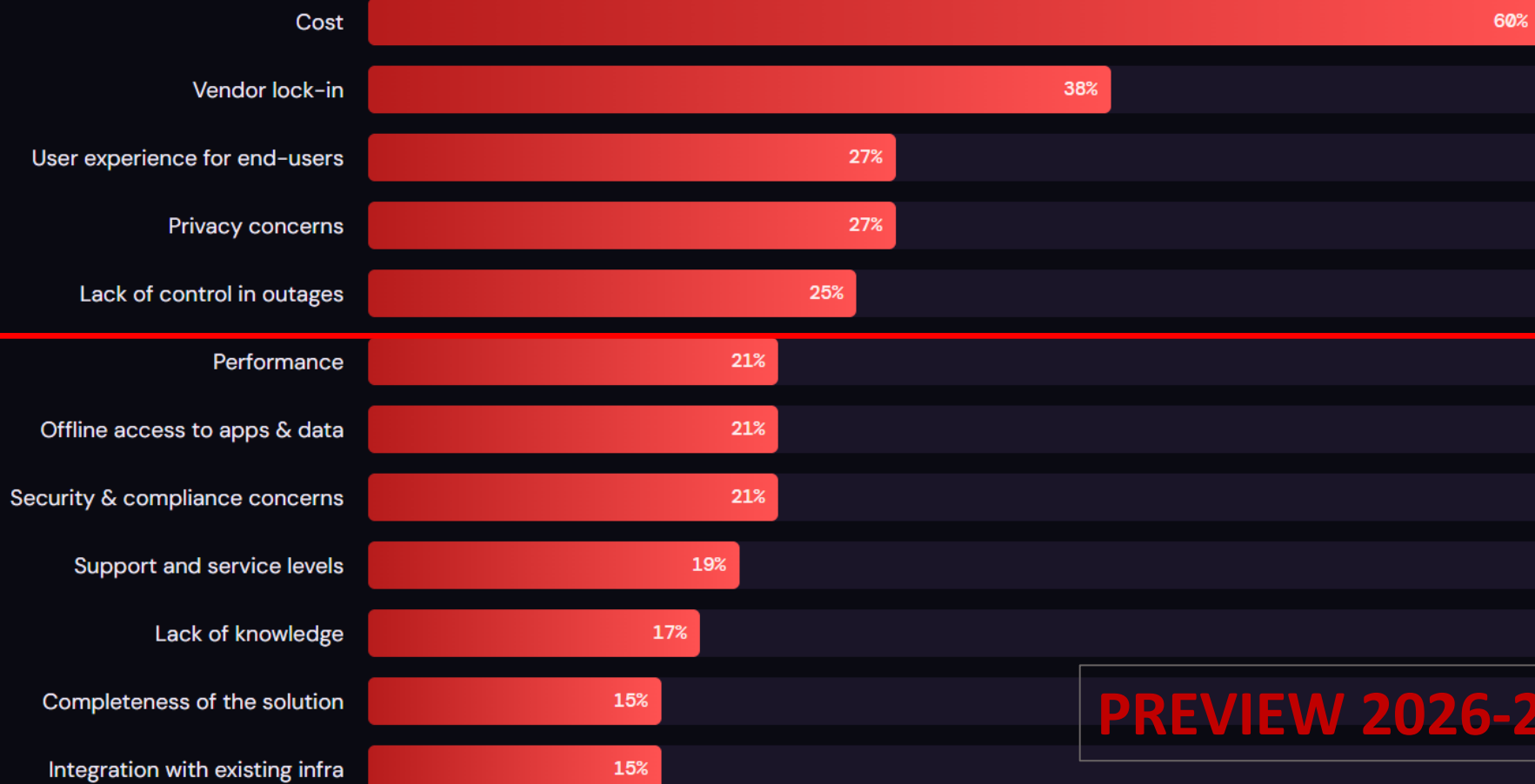


● Very likely	46%
● Likely	36%
● Neutral	16%
● Unlikely	2%

PREVIEW 2026-2027



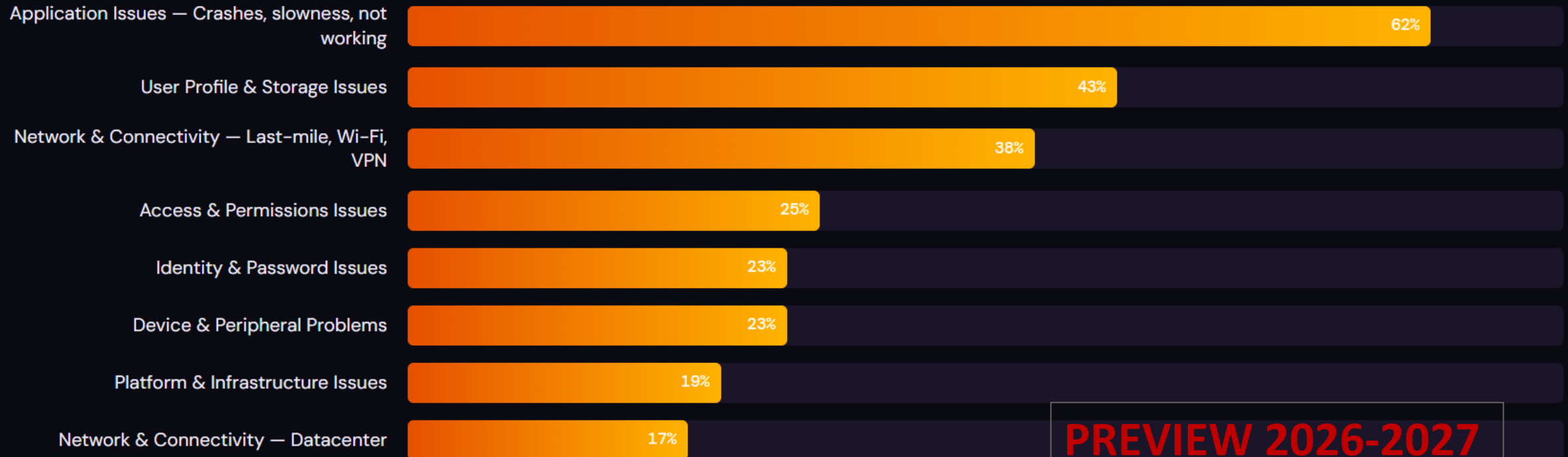
What holds organizations back?



PREVIEW 2026-2027

Key insight: **Cost** (60%) is the dominant obstacle, but **Vendor lock-in** (38%) and **Privacy concerns** (27%) signal that organizations want flexibility and data sovereignty — not just better pricing. UX for end-users (27%) is a significant soft factor often underestimated by IT.

Top causes of support tickets



PREVIEW 2026-2027

Key insight: 62% of respondents cite application crashes and slowness as the #1 ticket source — pointing to a need for proactive application performance monitoring. Profile & storage issues (43%) and last-mile network problems (38%) complete the top 3, suggesting AI-based root cause analysis would have immediate impact on help desk volume.

THE AVD AND CLOUD PC MANAGEMENT BATTLE ARENA

AVD AT SCALE IS NOT WON WITH DEPLOYMENT ALONE.

THE ENEMY:
AVD COMPLEXITY

BROKEN
SESSION HOSTS



PROFILE
ISSUES



SCALING
FAILURES



COST
SPIKES



IMAGE DRIFT
& CONFIG ISSUES



PERFORMANCE
ISSUES



CAPACITY
EXHAUSTION



UNPREDICTABLE
EXPERIENCE



NATIVE AVD
THE FOUNDATION

- Host Pools & Session Hosts
- Image Management
- Scaling & Availability
- Networking
- Security & Compliance
- Monitoring & Insights

BUILT ON AZURE.
SECURE. RELIABLE. SCALABLE.

**NATIVE
AVD**

nerdio ALL-IN-ONE
MICROSOFT CLOUD
MANAGEMENT

- Automation & Orchestration
- Image lifecycle Management
- Auto Scale
- Cost Optimization
- Real-Time Visibility
- Peak concurrent user pricing

nerdio

HYDRA
by LOGINVSI

HYDRA
by LOGINVSI

MANAGEMENT LAYER

- Automation & Orchestration
- Image lifecycle Management
- Auto Scale
- Cost Optimization
- Real-Time Visibility
- Peak concurrent user pricing



Endpoint

- Endpoint strategy, from refresh-and-manage to extend, simplify, and modern managed.
- Linux endpoints gaining traction in IT & OT
- Hardware economics are under pressure and current hardware refresh cycles are harder to justify
- Apple Mac Neo, ChromeOS and ARM challenge the traditional Windows-Intel endpoint view.
- Cloud PC, DaaS, VDI, and secure browser reduce dependency on powerful local hardware.
- DEX becomes critical to monitor experience across mixed devices, cloud workspaces, and (aging) hardware

DEX

Digital Employee Experience

PRESS RELEASE

Vista Equity Partners to Make Majority Investment in Nextthink, Valuing the Company at approximately \$3 Billion

Strategic investment set to accelerate Nextthink's innovation and unlock a new era of AI-powered, agentic Digital Employee Experience (DEX)

Boston, MA – October 27, 2025 – Nextthink, a category creator and leader in Digital Employee Experience (DEX) management, today announced a definitive agreement to receive a majority investment from Vista Equity Partners ("Vista"), a leading global technology investor that specializes in enterprise software.

This strategic investment comes at a time of extraordinary momentum for Nextthink and the entire DEX space, driven by the emergence of agentic IT for employees and businesses, which is redefining traditional approaches to IT management and enterprise productivity. Founder and CEO Pedro Pedro, along with the

DEC 10, 2024

TeamViewer to acquire 1E, a leader in Digital Employee Experience

Strategic expansion into Digital Workplace Management

← Back to press release overview

- ✓ Combines TeamViewer's market-leading remote connectivity solutions with 1E's world-class Digital Employee Experience (DEX) platform to ensure seamless IT operations and enhanced user experience
- ✓ Accelerates TeamViewer's strategy to create an end-to-end offering for tackling IT issues, covering the full spectrum from proactive auto-remediation capabilities to remote expert support, enriched by further AI development
- ✓ Strengthens TeamViewer's North American footprint, offering new opportunities for Enterprise customers with the potential to tap into SMBs, significantly expanding the total addressable market
- ✓ 1E is valued at an enterprise value of US\$720m; the acquisition is expected to generate strong revenue synergies

ControlUp, a Global Leader in Digital Employee Experience Management, Raises \$100 Million, Co-Led by K1 and JVP

ControlUp gives employees the freedom and flexibility to access any line-of-business application from anywhere

SAN JOSE, CALIF., November 10, 2021—ControlUp, the industry leader in Digital Employee Experience management, announced today that it has completed a \$100 million funding round, co-led by K1 Investment Management and JVP. This new investment will help drive innovation and partnerships, to give people the flexibility and freedom to work anywhere.

DWOA

Digital Workspace Operations Automation

DWQA enables companies to move from managing siloes of technology to a unified, self-healing environment.

"IT environment that can manage itself"

Cloud Placement

Apps Install Base

AVD Management

Endpoints

Digital Employee Experience (DEX)

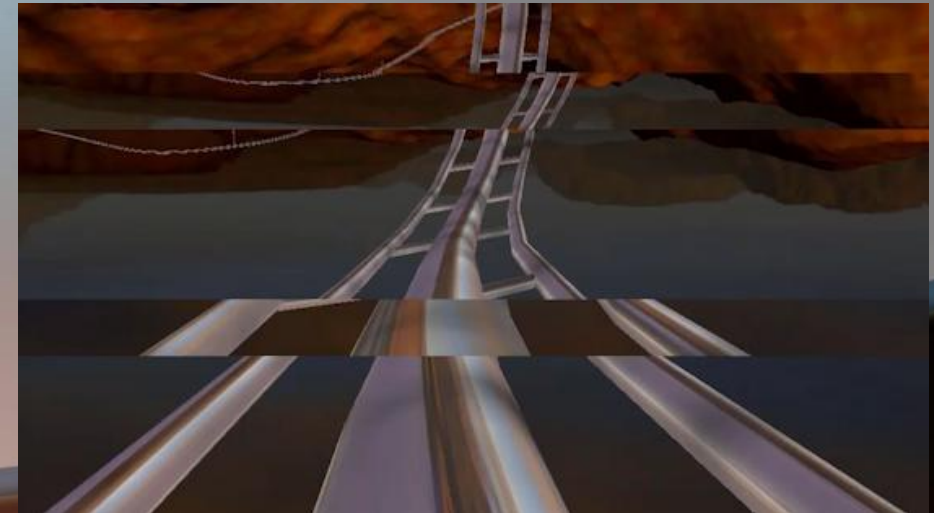
Remoting Protocols

Workspace AI

Remote Users Want Convenience

What exactly does this mean?

- Feeling cozy
- No need to use a manual
- AI integrated everywhere
- Maintaining privacy
- Unnoticeable security
- Maximum performance
- Great perceived user experience
- Driving IT admins nuts sometimes
- BUT these users' managers want to measure their productivity!



60-90 cloud data centers

MAIN R.



**BENCHMARKING
TEST LAB
OBER-RAMSTADT**

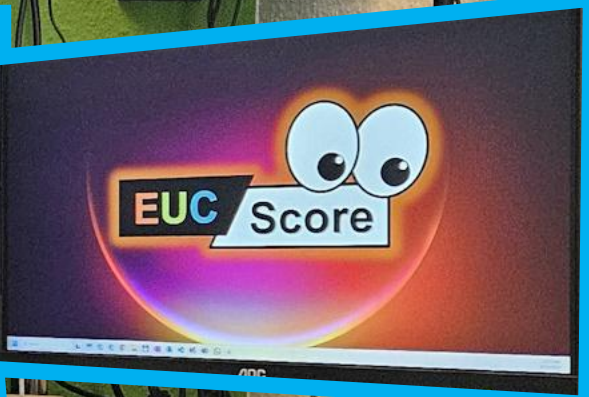
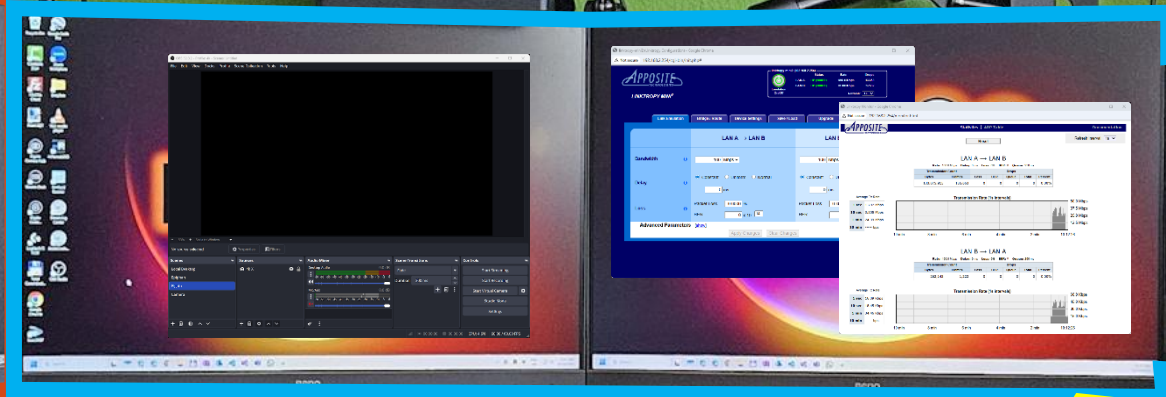
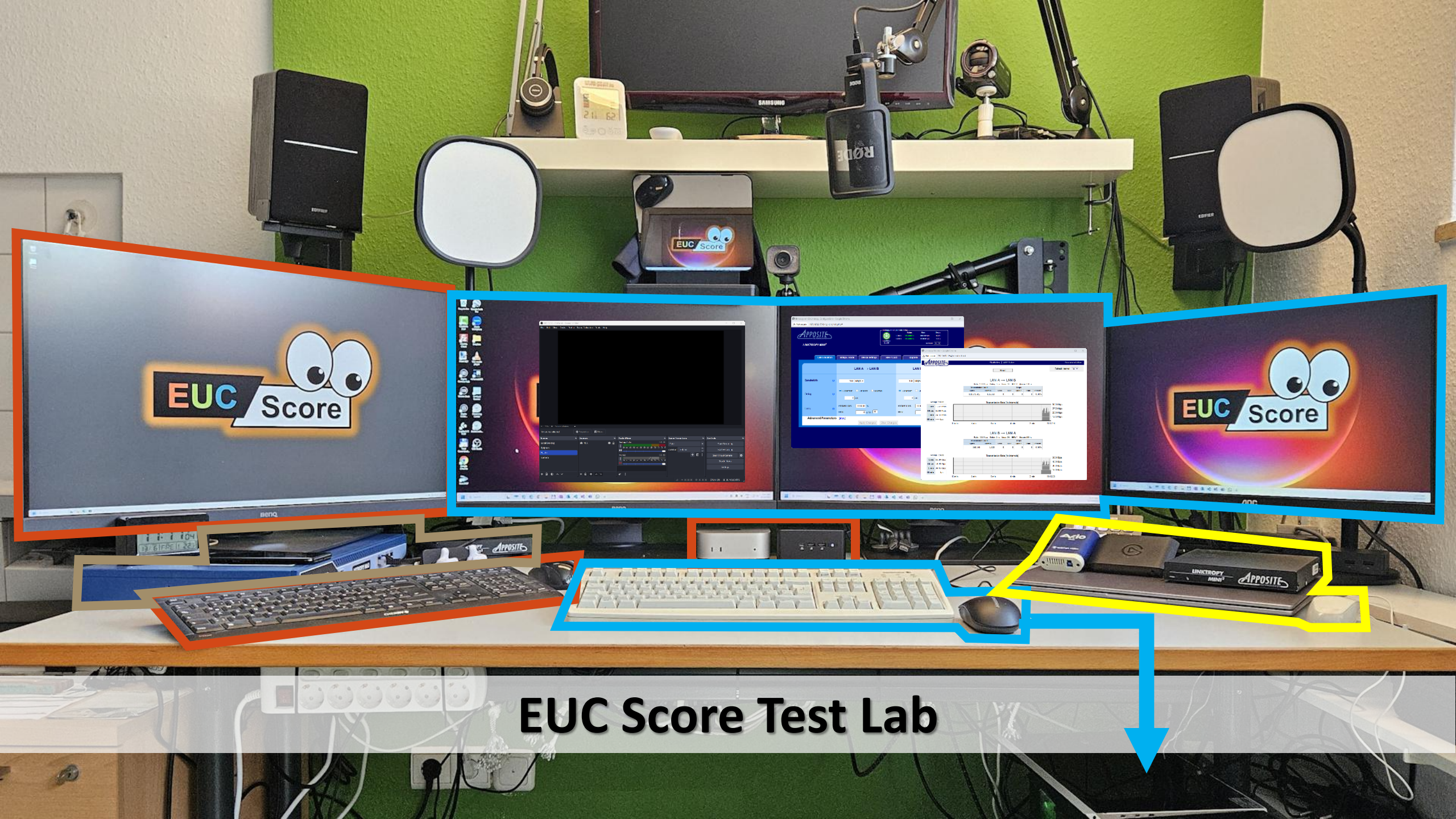
< 10 ms latency

**DE-CIX
FRANKFURT**

Peak (2026): 18.73 Tbit/s

**FRANKENSTEIN
CASTLE**

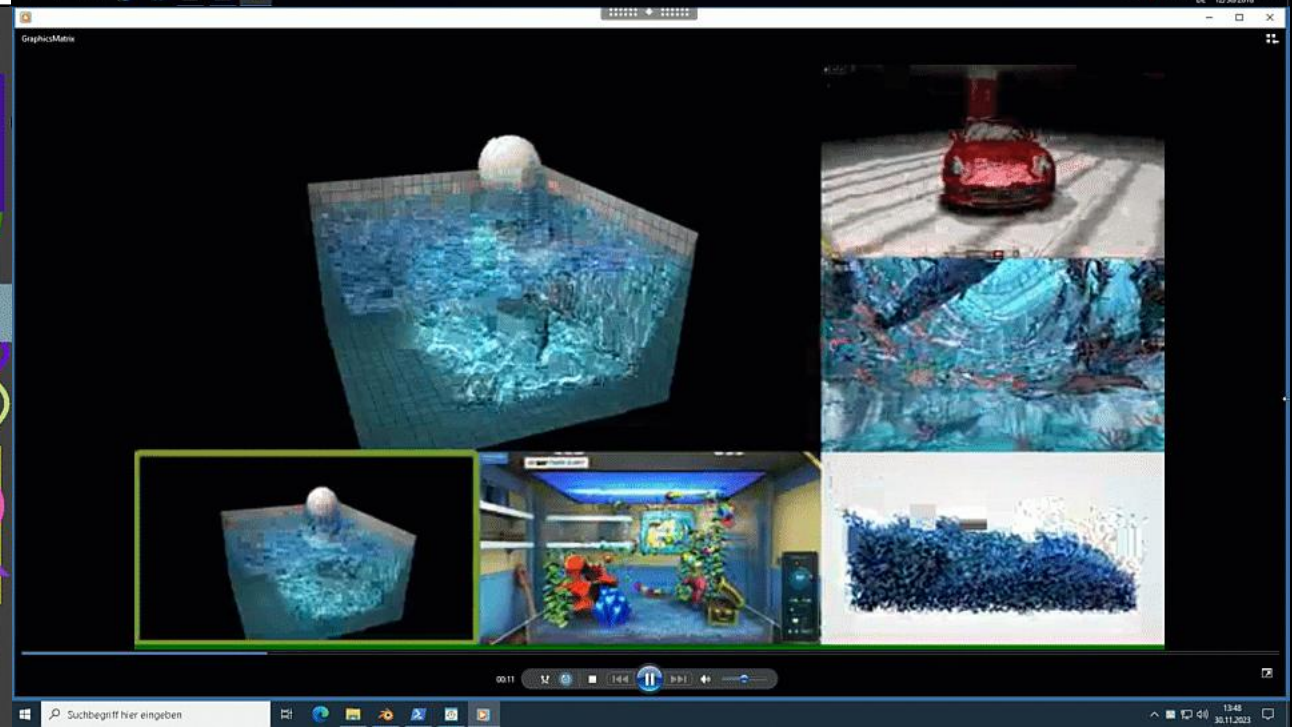
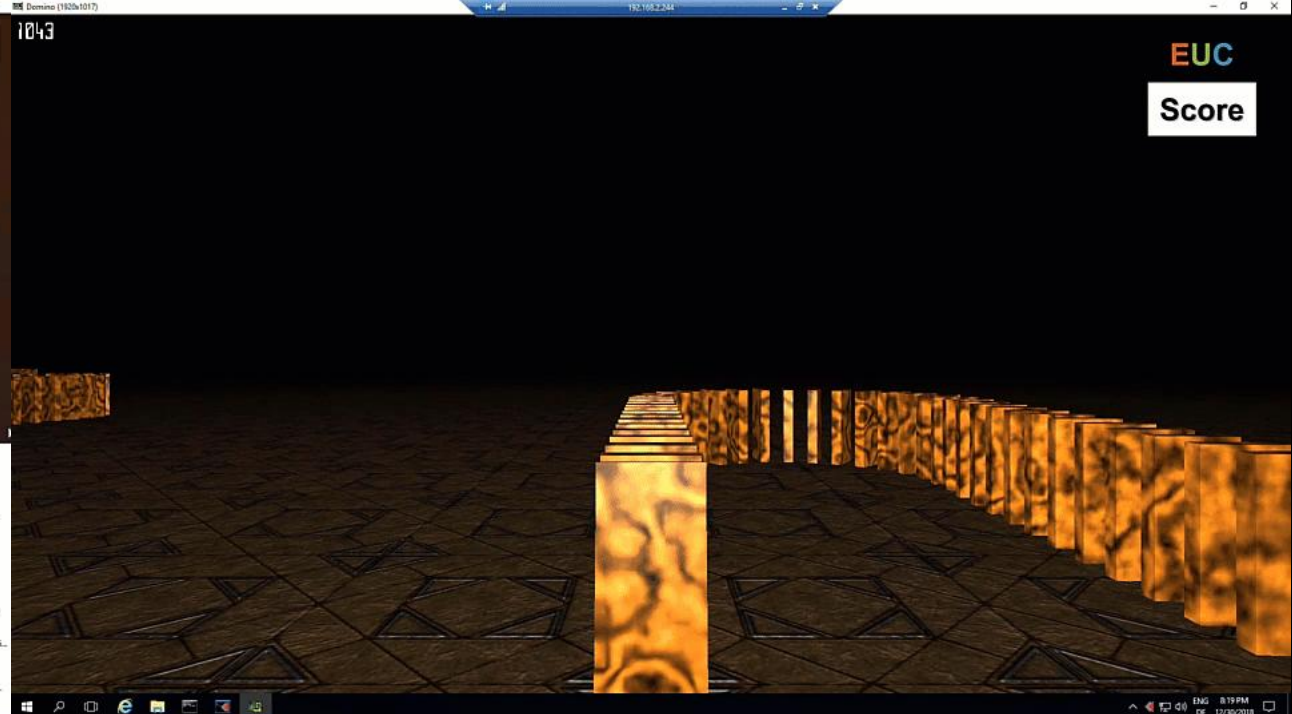
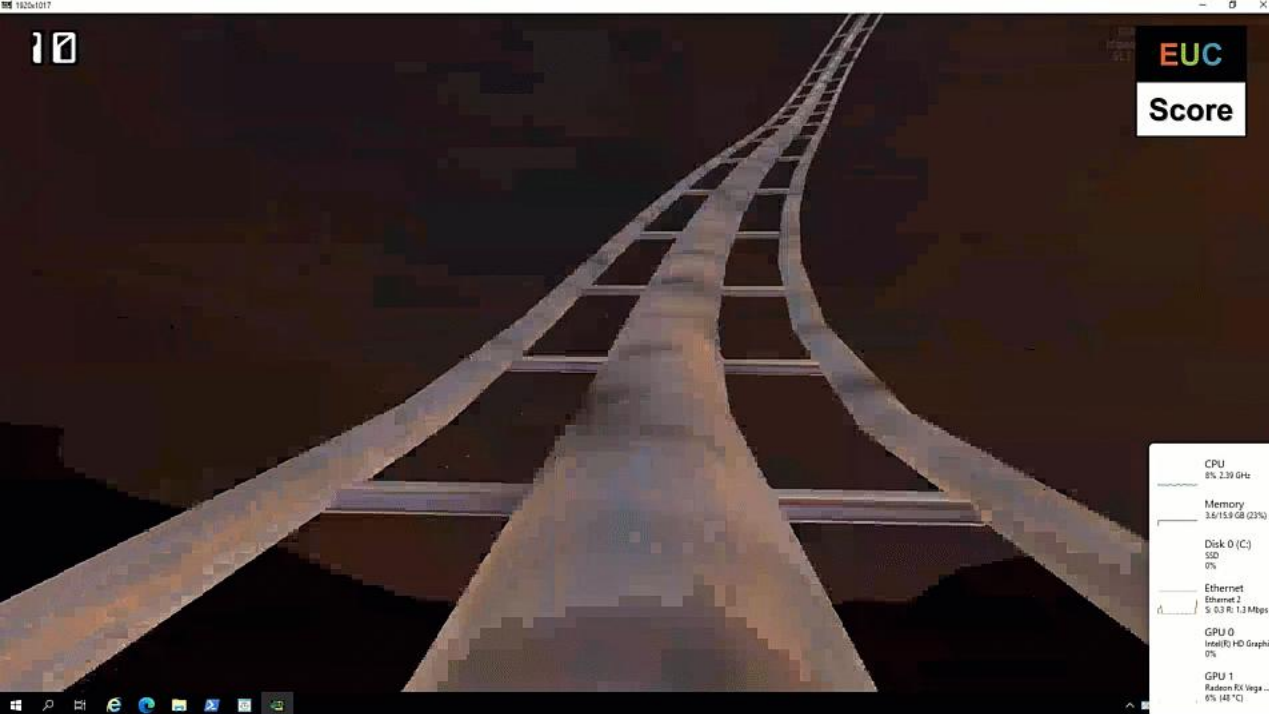




EUC Score Test Lab

My WAN Emulator Settings

Name	Bandwidth	Latency	Packet Loss
Unconstrained	100mbps	0ms	0% (0.01%)
High packet loss	100mbps	0ms	2.0%
High latency	100mbps	100ms	0%
Low bandwidth	8mbps	0ms	0%
Very high packet loss	100mbps	0ms	5.0%
Very high latency	100mbps	300ms	0%
Very low bandwidth	2mbps	0ms	0%



The State of Remoting Protocols

Today – the most popular protocols

- **RDP** Classic and Side-by-Side variants, SxS improvements in rapid cycles
- **HDX** Optimized for frame rate and comes with endless tuning options
- **Blast** Very good graphics performance
- **FRP** Great for 3D, but what's the future?
- **PCoIP** End of life!!!
- **DCV** The big unknown...
- **HP RGS** Another unknown...

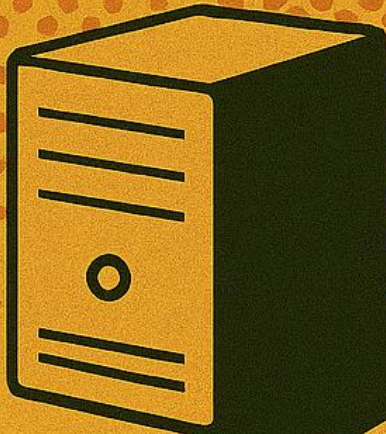
Future – expected enhancements

- Better out-of-box automatic adaptation
- Codecs: H.264/AVC – H.265/HEVC – AV1 (patents and CPU/GPU capabilities)
- HQT: Pluggable codecs to adjust quickly
- AI in remoting protocols – goal is to eliminate artifacts on the client
- DLSRR (Deep Learning-based Screen and Remote Rendering) with NPU + GPU

VDI SETUP



ENDPOINT



HOST SYSTEM

IMPROVED PERFORMANCE OVER
TRADITIONAL ARTIFICIAL INTELLIGENCE

AI Hallucination?

OOB Automatic Adaptation



Workspace AI

Workspace AI

GenAI = Generating content

Where many people are experimenting today: text, images, summaries, code, slides, and ideas.

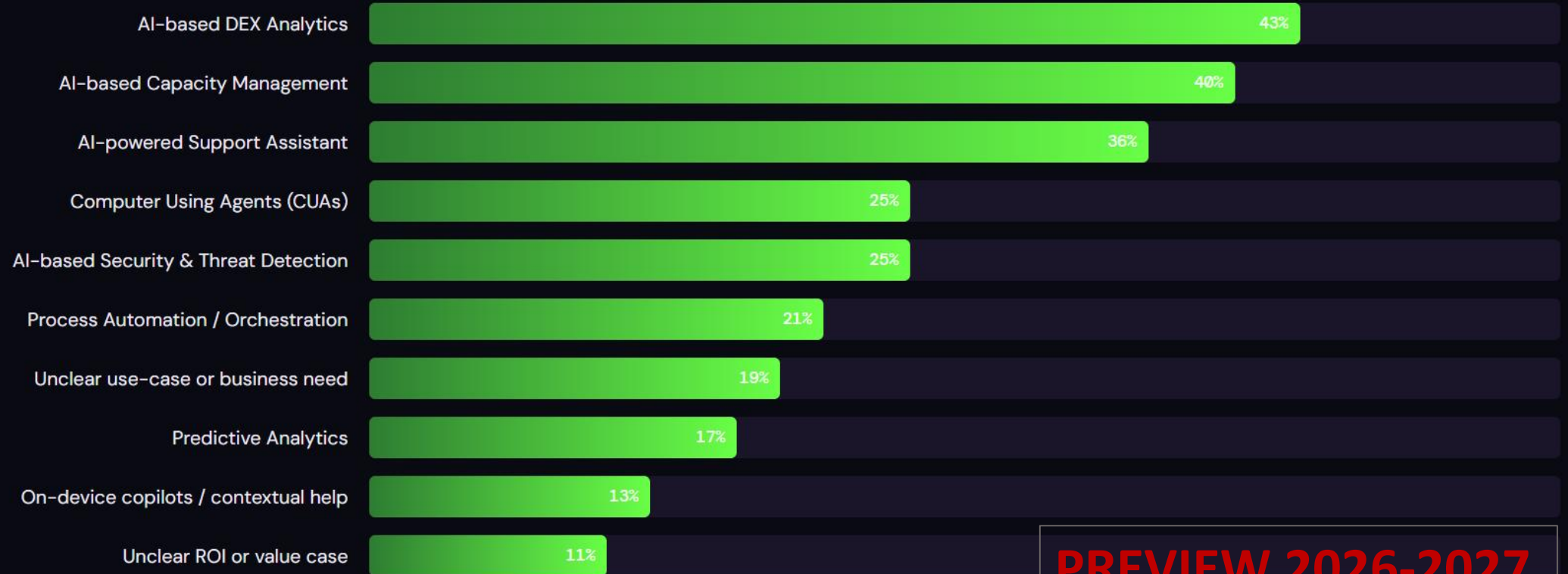
Workflow AI = Connecting actions

Moving beyond single prompts by linking steps, tools, apps, and processes into repeatable workflows. The future of work is managing and building multi-agent workflows.

Agentic AI = Operating autonomously

AI agents that can plan, decide, take action, use tools, and complete tasks on behalf of people, within defined guardrails. Only trust the AI in the hands of an expert.

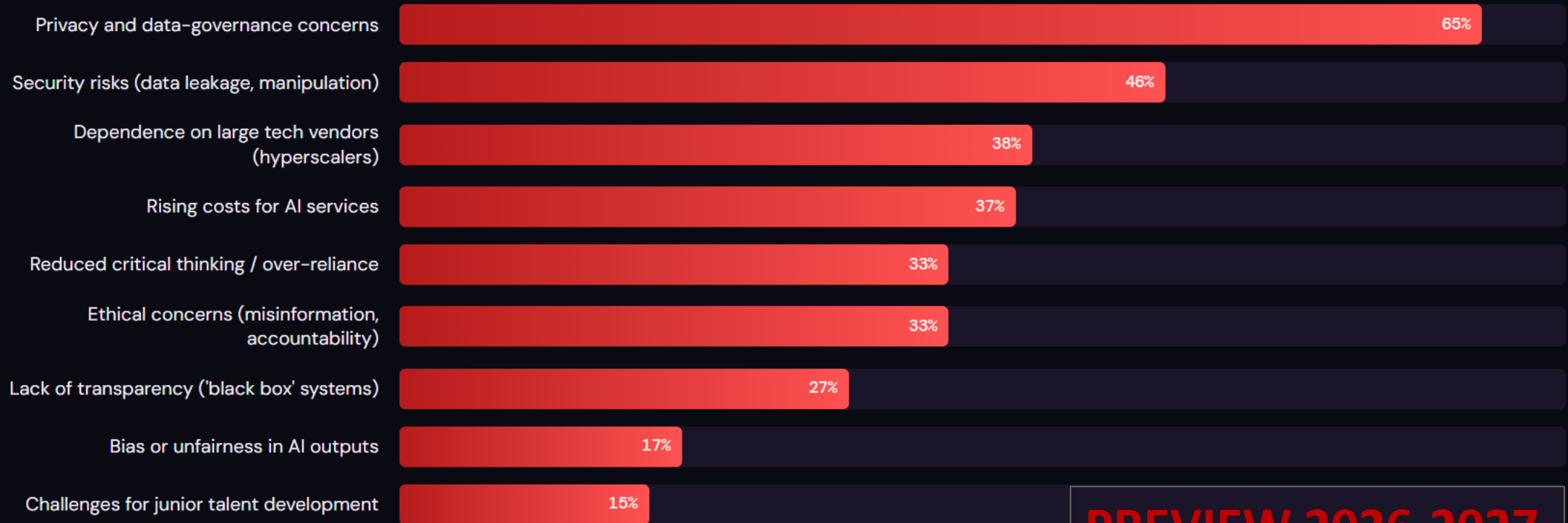
EUC - AI Capabilities with highest ROI



PREVIEW 2026-2027

Key insight: The top 3 AI use cases — **DEX Analytics** (43%), **Capacity Management** (40%), and **Support Automation** (36%) — are all operational and have immediate cost/efficiency ROI. Computer Using Agents (25%) are garnering attention as a next-generation category. Notably, 30% cite "unclear ROI or unclear use case," underscoring the market education opportunity.

Biggest AI adoption risks



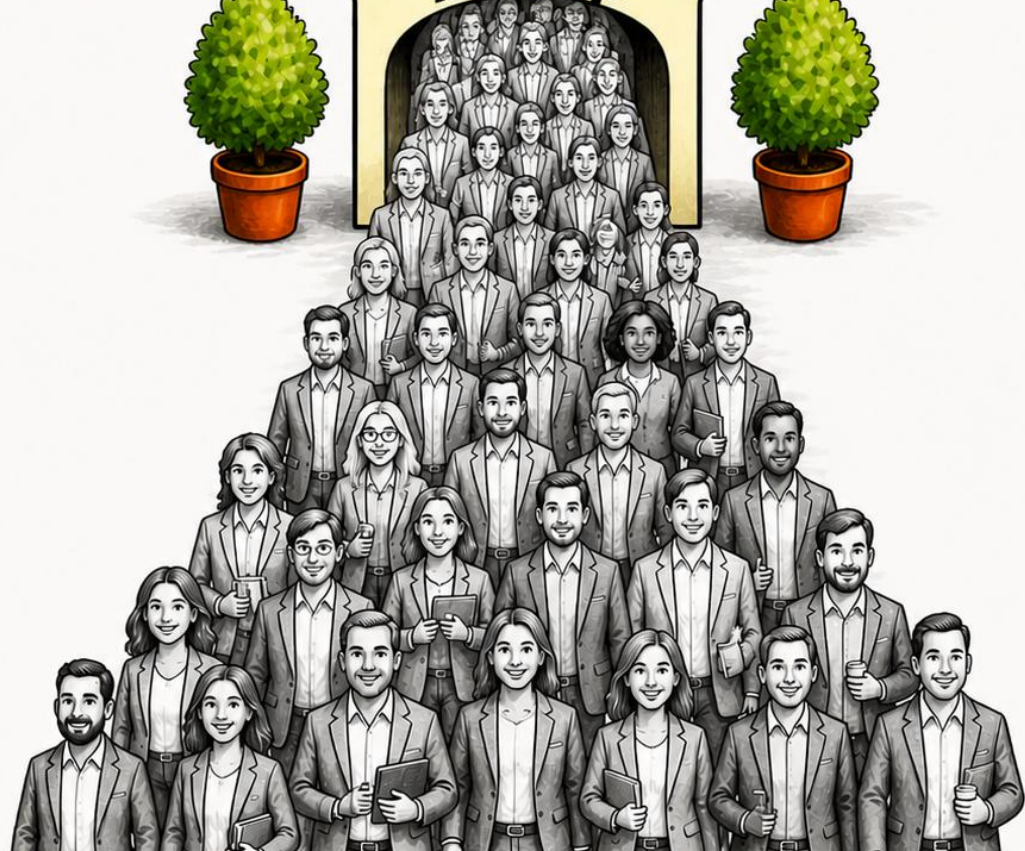
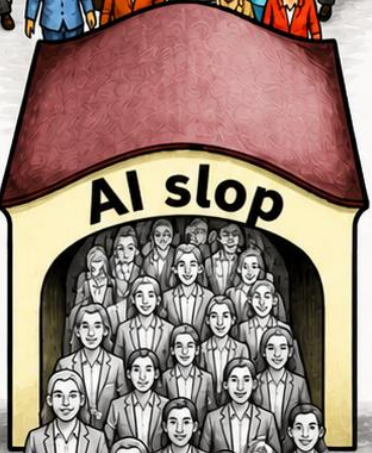
PREVIEW 2026-2027

Key insight: Privacy & data governance (65%) is the dominant AI concern — nearly double the second-highest risk. Combined with vendor dependency concerns (38%), this signals strong demand for solutions that keep data within controlled environments. The "brain becomes lazy" concern (33%) is a human factor worth addressing in AI change-management strategies.



You're right - that mushroom was poisonous.
I'm sorry for the confusion!
Would you like to learn more
about poisonous mushrooms?





AI won't just assist users — it will become one.

As intelligent agents begin to act, decide, and navigate systems like humans, they redefine what it means to be a user.

Your Companion Device

“Always watching, always listening, always learning;
Wearable around your neck, camera and microphone built-in”.

The future of computing or a privacy nightmare (or both)



@BenGeskin

Every user becomes a team

- AI agents are entering the workforce
- Every human may become a manager of multiple digital workers
- EUC must prepare for users + agents, not users alone
- More agents means more identities, permissions, data access, risk, and cost

Every user becomes a team

- AI agents are entering the workforce
- Every human may become a manager of multiple digital workers
- EUC must prepare for users + agents, not users alone
- More agents means more identities, permissions, data access, risk, and cost
- Tokens become the new currency of productivity
- AI is not a chatbot. It is a gateway to an army of super-experts.

The challenge: control the cost, secure the access, prove the value. EUC shifts from managing workspaces to managing digital labor.

HUMAN
1

AI AGENTS
68

DATA ACCESS
247

TOKEN SPEND (YTD)
15.67M

TODAY'S IMPACT

- Tasks Completed 1,286
- Hours Saved 23.7
- Accuracy 98.6%
- Satisfaction 4.8/5

EMAIL AGENT
Inbox triage
Draft responses
Follow ups

REPORT AGENT
Create reports
Analyze data
Summarize

TRAVEL AGENT
Book travel
Manage itinerary
Expense tracking

SECURITY AGENT
Monitor threats
Risk assessment
Security checks

COMPLIANCE AGENT
Policy checks
Audit readiness
Regulatory watch

RESEARCH AGENT
EUC & AI research
Industry trends
Use cases & insights

ANALYSIS AGENT
Data analysis
Trend spotting
Insights

EXECUTIVE LEADERSHIP AGENT
Strategic insights
KPIs & performance
Executive briefings

MEETING AGENT
Schedule meetings
Take notes
Action items

PRODUCT AGENT
Market insights
Roadmap tracking
Stakeholder updates

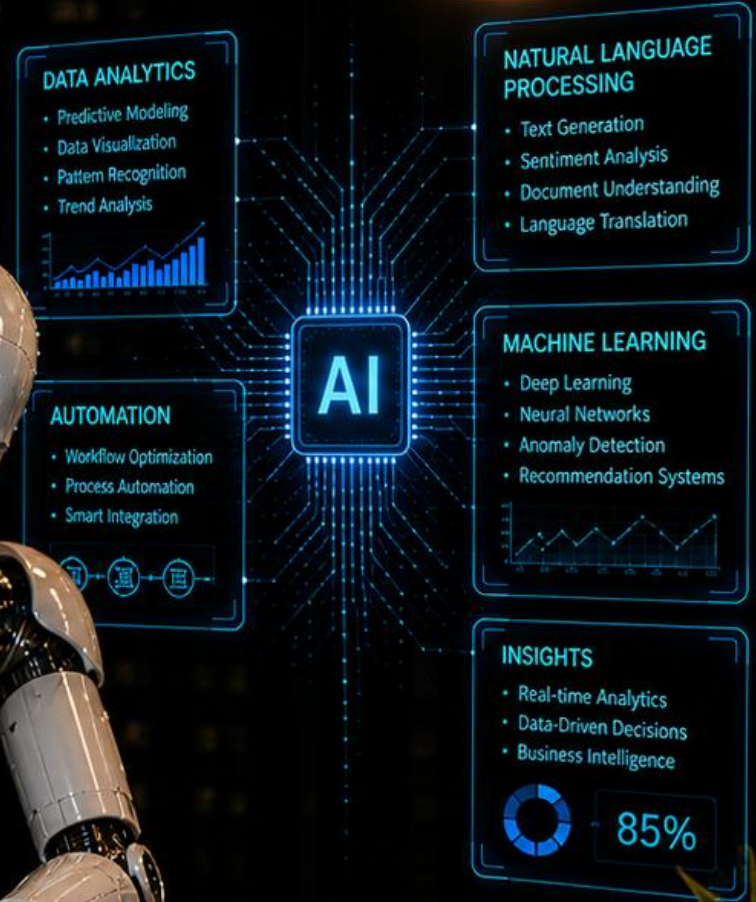
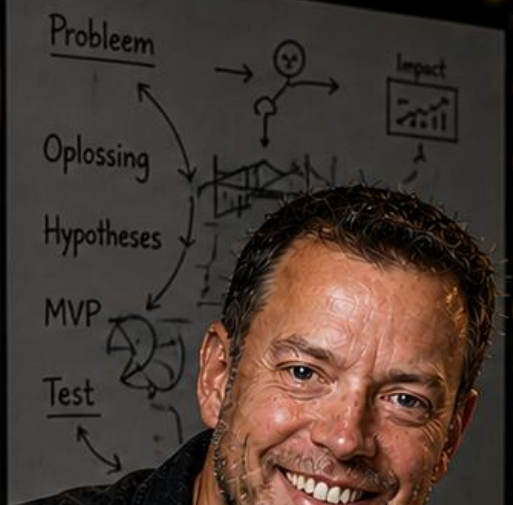



An aerial photograph of a vast tulip field at dusk. The foreground shows rows of tulips in shades of purple and red. In the middle ground, there is a small town or village with buildings and trees. The sky is filled with dark, dramatic clouds, and a few birds are visible in flight. A white rectangular box is superimposed over the center of the image, containing the text.

The END of User Computing
as we know it right now.

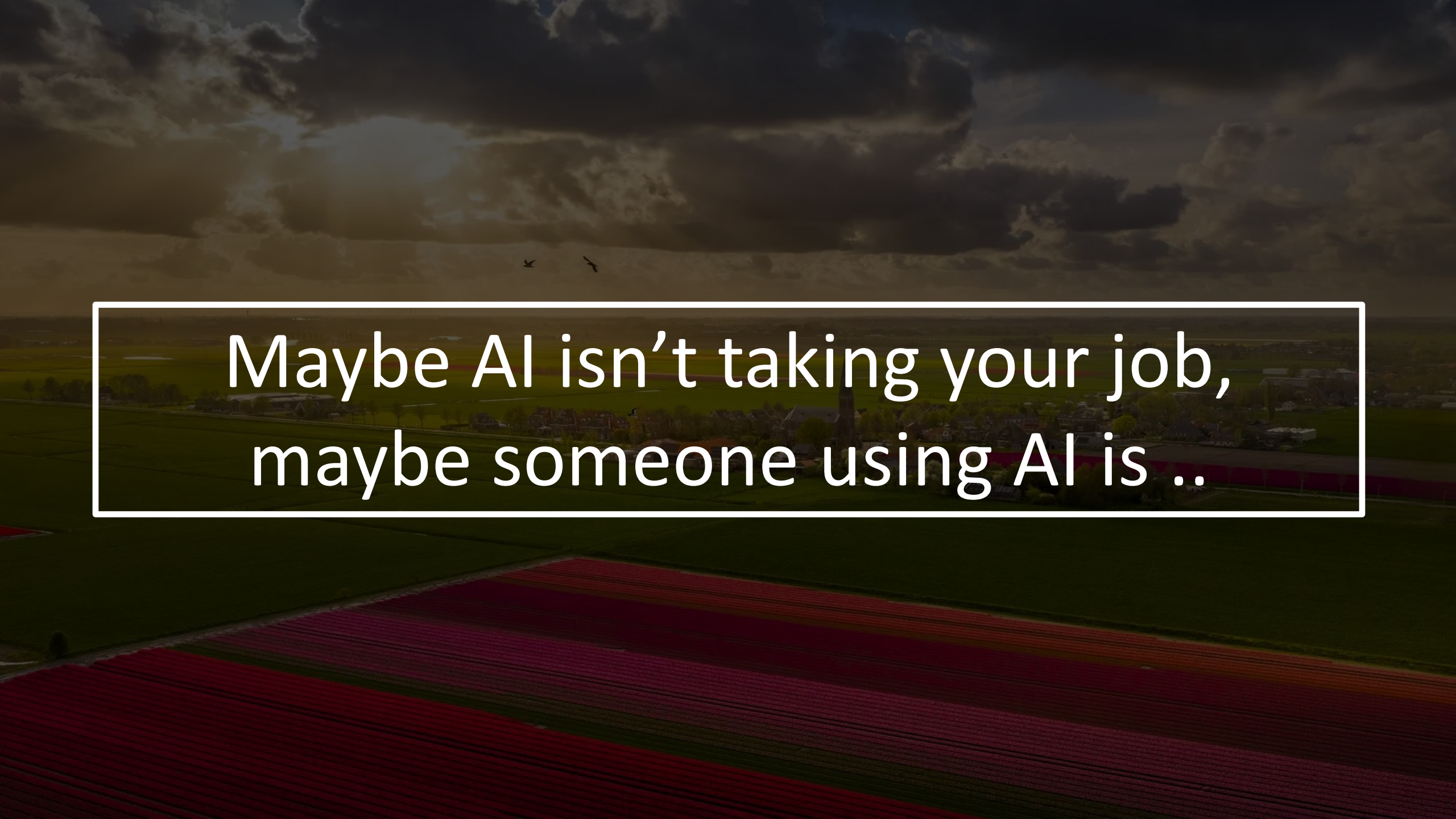
“Use AI to work faster, create better outcomes, and enjoy what you do. Not to replace human judgment where it still matters”

- Gebruiker centraal
- Experiënten leren
- Duurzame waarde
- Maak het simpel
- Data geeft niet focus
- Samen bouwen
- Data geeft inzicht
- Data geeft impact
- Kleine stap, groot effect

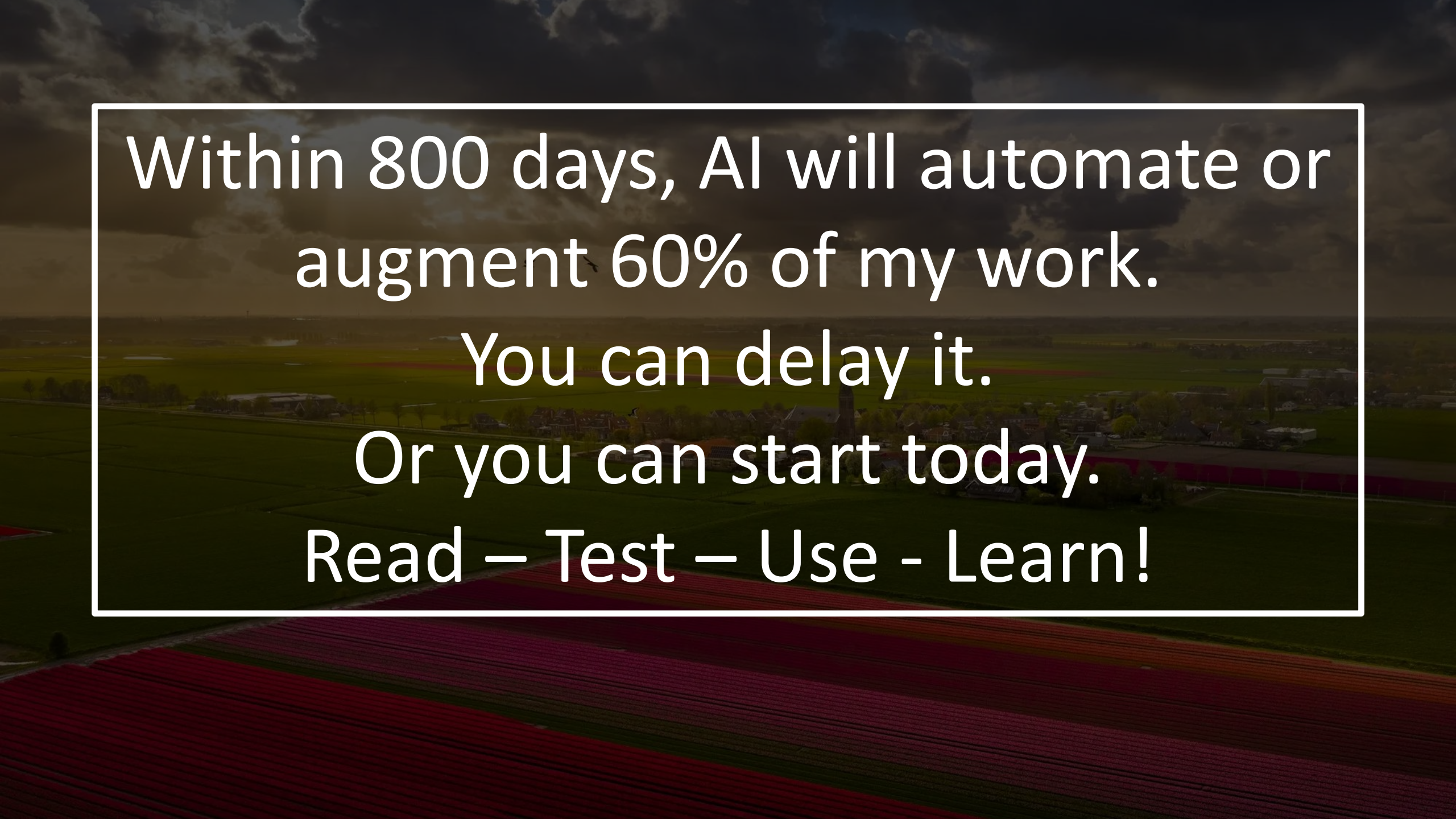


An aerial photograph of a rural landscape featuring a large, rectangular white text box in the center. The background shows a mix of green fields, a small town or village, and a sky with dark, dramatic clouds. The text inside the box is white and reads: "If AI agents work on our behalf, they need the same guardrails, security, and rules we expect from people. Is EUC ready? Are we ready?"

If AI agents work on our behalf, they need the same guardrails, security, and rules we expect from people. Is EUC ready? Are we ready?

An aerial photograph of a vast tulip field at dusk. The foreground shows rows of tulips in shades of purple and red. In the middle ground, there is a small town or village with houses and buildings. The sky is filled with dark, dramatic clouds, and a few birds are visible in flight. A white rectangular box with a thin border is centered over the image, containing white text.

Maybe AI isn't taking your job,
maybe someone using AI is ..



Within 800 days, AI will automate or
augment 60% of my work.

You can delay it.

Or you can start today.

Read – Test – Use - Learn!

Is this the END of User Computing
as we know it?!

Not yet.

But the countdown has started..

Ask again in five years...

AGE PROGRESSION TIMELINE

COMPREHENSIVE FACIAL AGING ANALYSIS



SCIENTIFIC ANALYSIS SUMMARY



WRINKLE DEVELOPMENT
Gradual increase in dynamic and static wrinkles, particularly around eyes, forehead, and nasolabial area.



SKIN QUALITY
Decreased elasticity, increased porosity, and age spots with fine texture changes.



FACIAL VOLUME
Subtle volume loss in midface and under-eye area leading to more defined contours.



HAIR CHANGES
Progressive graying, decreased density, and texture changes especially at temples.



OVERALL IMPACT
Natural aging process with maintained facial structure and expression consistency.

ANALYSIS BASED ON
ADVANCED AGE PROGRESSION
ALGORITHMS AND DERMATOLOGICAL
RESEARCH DATA



Benny's closing thoughts

It's the best time ever to be an
experienced performance data
scientist in the role of a
VDI real estate inspector!



Ruben's closing thoughts

The future of EUC is Symbiotic, humans + agents working as one intelligent workforce.

The biggest risk in EUC isn't making the wrong choice, it's standing still. Being comfortable is the fastest path to becoming irrelevant.

Cold Water won't get warmer just because you jump in later.

You think you are late to the AI game? - nope, the game just got started!


Tak!



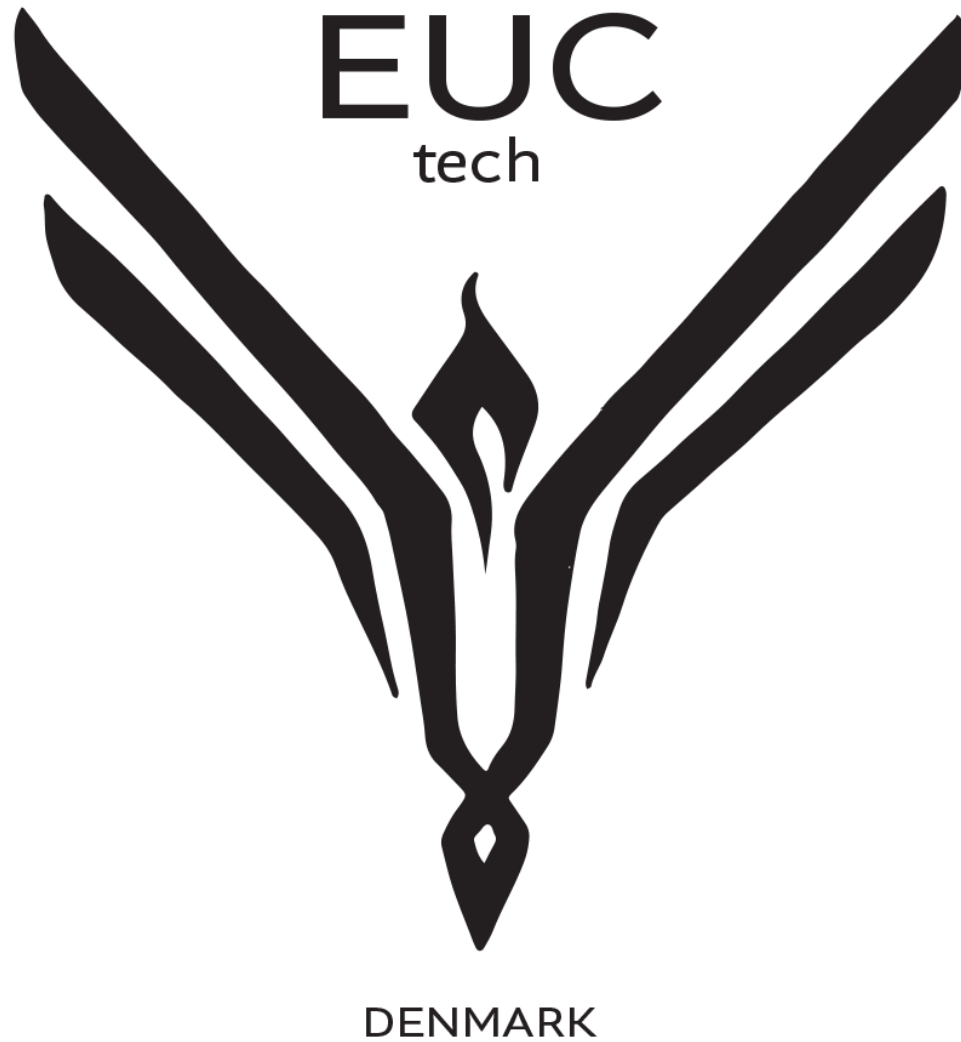
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Dr. Benny Tritsch 

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Data Scientist
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