Fivetran

OPEN DATA INFRASTRUCTURE | 2026

Breaking Vendor Lock-In in the Age of AI

Why open architecture wins the AI era

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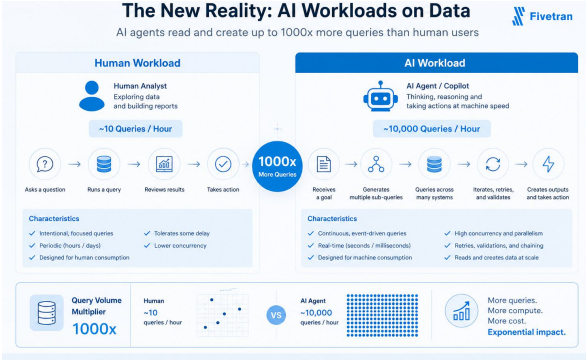
The New Consumer of Data: AI Agents

— The traditional data stack was built for human consumption — analysts, dashboards, BI tools

— AI agents are the new data consumers and scale 1000x faster than any human

— Unlike humans, agents don't forgive bad data quality and operate continuously

— Agents multiply query and token costs by 1000x, breaking warehouse-centric stacks



1000×

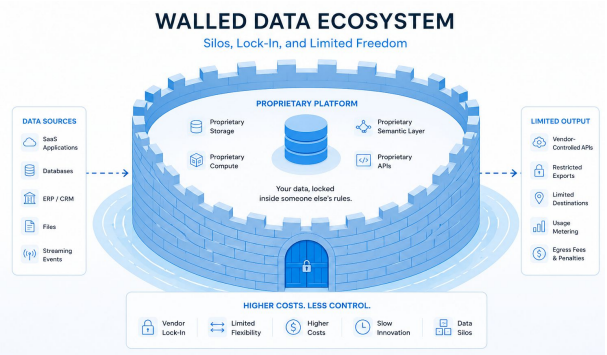
AI agent query cost multiplier vs. a human analyst

Walled Ecosystems and Vendor Lock-In

— Rise of proprietary 'walled garden' platforms that lock organizations into specific vendors

— Closed architectures restrict flexibility for AI workloads and real-time use cases

— Critical business data — SAP ERP, Salesforce CRM — trapped in siloed ecosystems



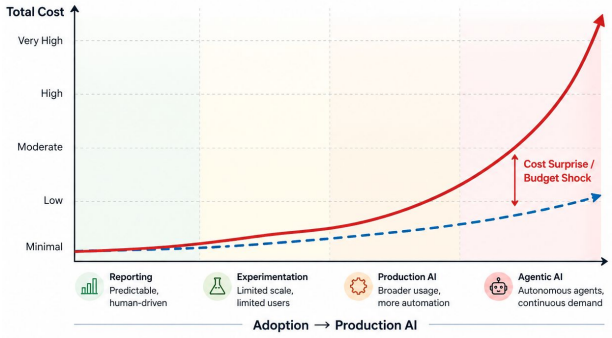
The Cost of AI Success

— Data warehouse costs rise exponentially along the AI Maturity Curve

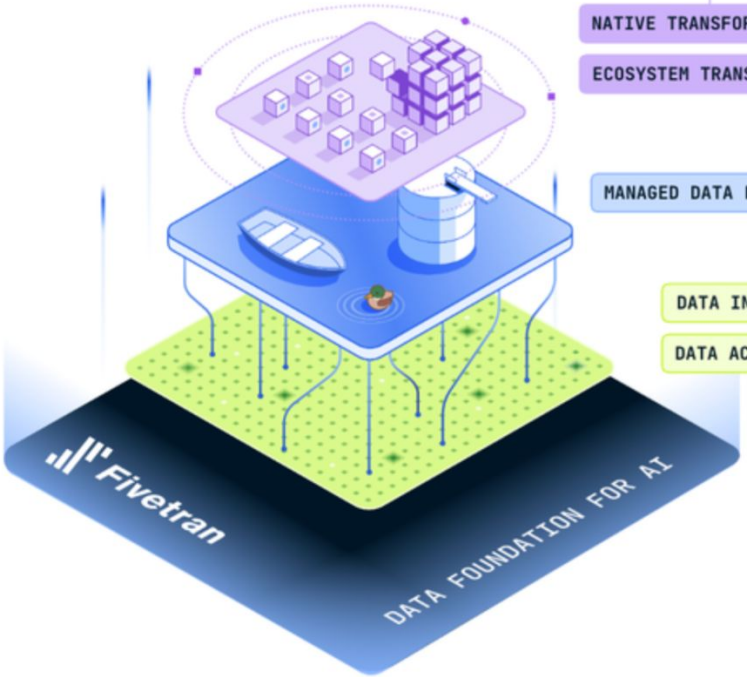
— Open Data Infrastructure (ODI) costs scale linearly

— Adopting an open data lake at the 'Proto AI' phase avoids exponential cost spikes

— Waiting until the Agentic AI phase means the financial penalty of success is crippling



The Solution:
Open Data Infrastructure



TRANSFORM

Turn raw data into analytics- and AI-ready datasets your teams can trust, and build on.

MANAGE

A fully managed, open-format data lake — governed, portable, and always under your control.

MOVE

Move data from any source to any destination reliably and automatically, and activate it back into the business.

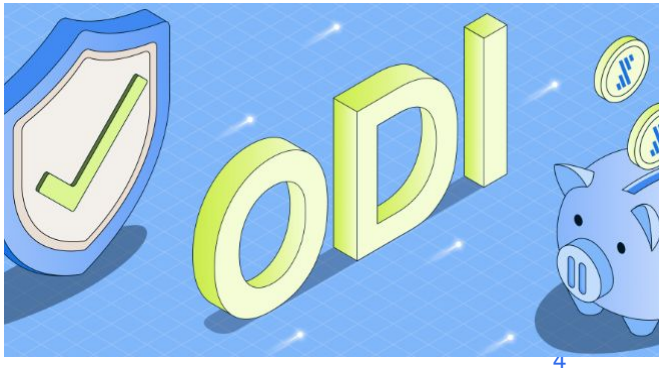
Open Data Infrastructure (ODI)

— Shifts from proprietary warehouses to open data lakes — Iceberg or Delta Lake on S3, ADLS, GCS

— Decoupled, portable compute: use Snowflake, Databricks, or Trino based on cost and efficiency

— AI agents automatically route queries to the most cost-efficient engine

— Shared semantic layer reduces duplicated agent effort and cuts token costs



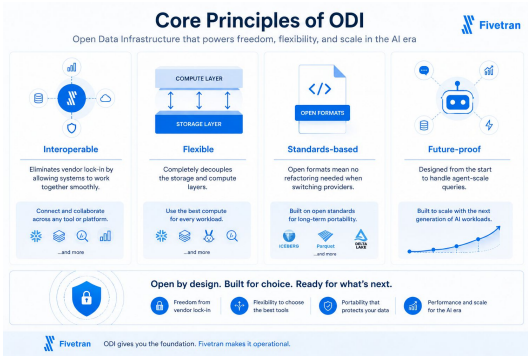
Core Principles of ODI

— Interoperable — eliminates vendor lock-in by allowing systems to work together smoothly

— Flexible — completely decouples the storage and compute layers

— Standards-based — open formats mean no refactoring needed when switching providers

— Future-proof — designed from the start to handle agent-scale queries



Operationalizing ODI with Fivetran

— Fivetran moves, manages, and transforms data to operationalize ODI end-to-end

— Always-on pipelines and an Iceberg-native open lake ready for any compute engine

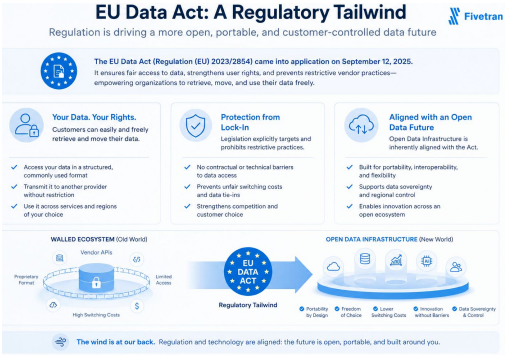
— dbt-native semantics ensure every human and AI agent works from the same definitions

Regulatory Tailwinds: The EU Data Act

— The EU Data Act ensures customers can easily and freely retrieve their data

— Legislation is explicitly designed to prevent restrictive vendor lock-in practices

— Open Data Infrastructure is inherently aligned with data sovereignty and portability



The Future of Software Licensing in the Age of AI

— Classic user-based software licensing models are quickly dying out

— Oracle and SAP now include AI agents as 'free' standard features — but the meter is running

— Billing is shifting to transaction- and usage-based: AI is the new cash register

— Future billing factors in efficiency gains achieved by AI — own your data or lose all leverage

Take back your data.

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