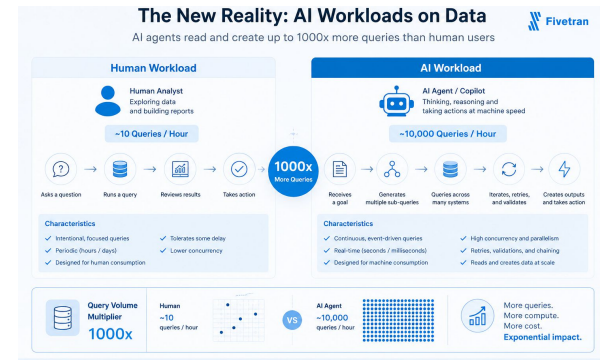


# Breaking Vendor Lock-In in the Age of AI

Why open architecture wins the AI era

# 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

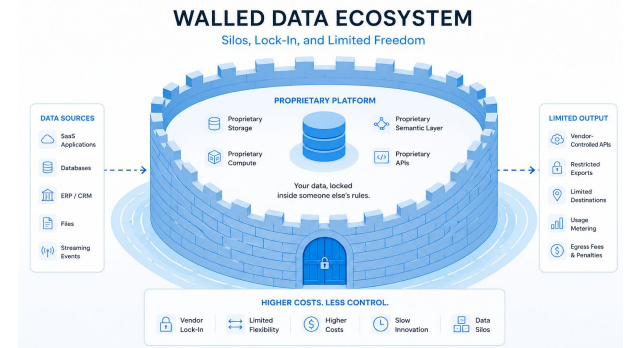


# 1000x

AI agent query cost multiplier vs. a human analyst

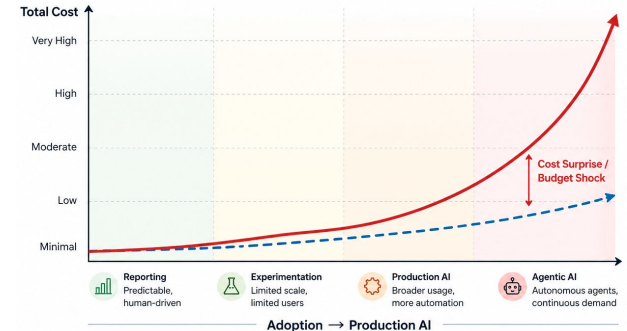
# Walled Ecosystems and Vendor Lock-In

- 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

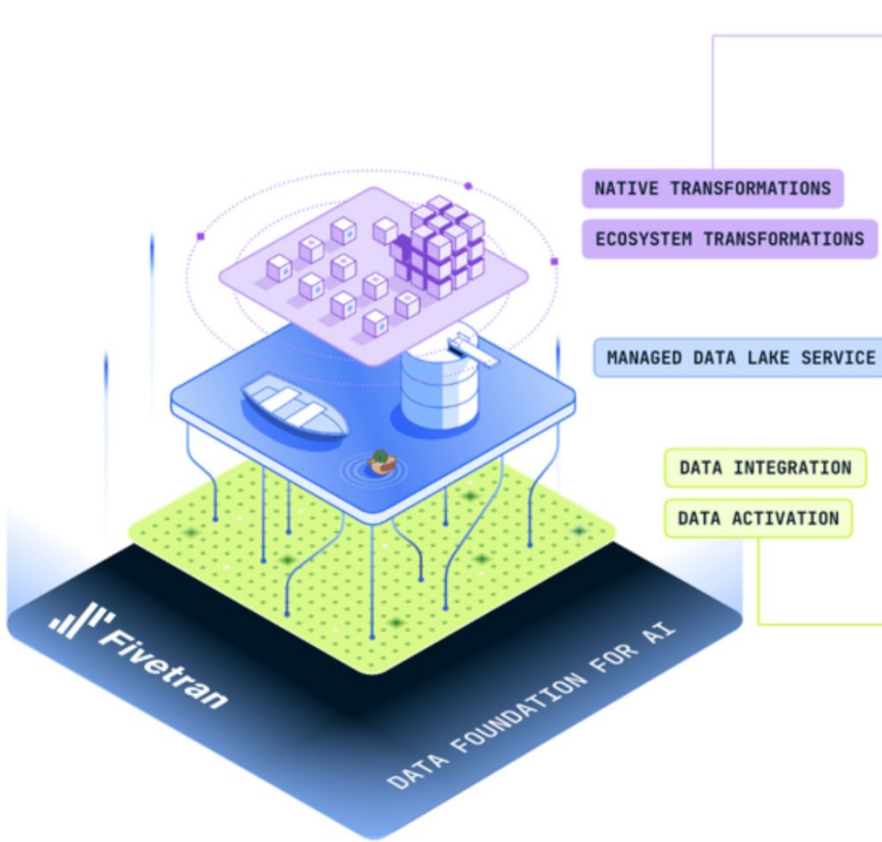


# The Cost of AI Success

- 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.

NATIVE TRANSFORMATIONS

ECOSYSTEM TRANSFORMATIONS

## MANAGE

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

MANAGED DATA LAKE SERVICE

DATA INTEGRATION

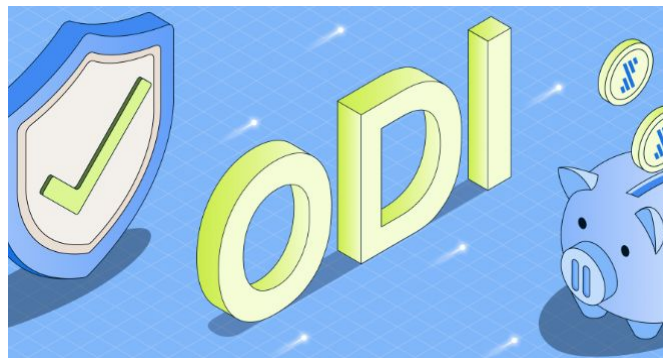
DATA ACTIVATION

## MOVE

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

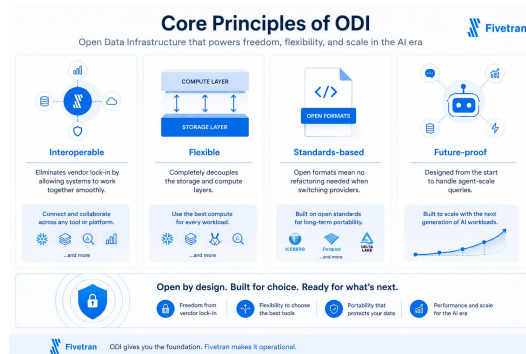
# Open Data Infrastructure (ODI)

- 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

**EU Data Act: A Regulatory Tailwind** 

Regulation is driving a more open, portable, and customer-controlled data future

The EU Data Act (Regulation (EU) 2023/2854) came into application on September 12, 2025. It ensures fair access to data, strengthens user rights, and prevents restrictive vendor practices—empowering organizations to retrieve, move, and use their data freely.

- Your Data. Your Rights.** Customers can easily and freely retrieve and move their data.
  - ✓ Access your data in a structured, commonly used format
  - ✓ Transfer it to another provider without restriction
  - ✓ Use it across services and regions of your choice
- Protection from Lock-in** Legislation explicitly targets and prohibits restrictive practices.
  - ✓ No contractual or technical barriers to data access
  - ✓ Prevents unfair switching costs and data lock-ins
  - ✓ Strengthens competition and customer choice
- Aligned with an Open Data Future** Open Data Infrastructure is inherently aligned with the Act.
  - ✓ Built for portability, interoperability, and flexibility
  - ✓ Supports data sovereignty and regional control
  - ✓ Enables innovation across an open ecosystem

**WALLED ECOSYSTEM (Old World)** vs **OPEN DATA INFRASTRUCTURE (New World)**

The infographic shows a transition from a 'WALLED ECOSYSTEM (Old World)' characterized by 'Vendor APIs', 'Limited Access', and 'High Switching Costs' to an 'OPEN DATA INFRASTRUCTURE (New World)' characterized by 'EU DATA ACT', 'Portability by Design', 'Precision of Choice', 'Lower Switching Costs', 'Innovation without Barriers', and 'Data Sovereignty & Control'. A 'Regulatory Tailwind' arrow points from the old world to the new world.

**The wind is at our back.** Regulation and technology are aligned: the future is open, portable, and built around you.

# 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.

FIVETRAN.COM · OPEN DATA INFRASTRUCTURE

