


**IT Market Insights:** AI continues to be the hottest topic, but the conversation is starting to shift from hype to impact. Below we look at two angles: whether AI could start to chip away at the traditional SaaS model as companies build more in-house, and how “vibe coding” is changing what it means to be a developer. Together, they point to the same theme: AI is changing the way we think and how we are getting things done.

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## ***Could AI Kill SaaS?***

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Something subtle but important is starting to change in how companies think about software. For the last 15–20 years, SaaS won because it was faster and cheaper to buy than to build. Many companies didn’t have the talent, time, or infrastructure to create their own tools. So, they outsourced it.

AI is starting to flip that equation.

With better dev tools, copilots, and lower engineering lift, more companies are asking a simple question: why are we paying for this? Internal tools that once required full teams can now be built and maintained with far fewer resources. That shift compresses the value gap. SaaS has always justified its cost by being clearly better than internal alternatives. As that edge narrows, pricing and retention come under pressure.

This doesn’t mean SaaS disappears. It means the bar goes up.

The winners will be platforms that are deeply embedded, hard to rip out, and continuously adding value. The ones most exposed are broad, easy to replace tools that have relied on pricing rather than differentiation.

AI isn’t killing SaaS. But it is forcing a reset. And for the first time in a while, “build vs. buy” is back on the table, and can be a viable and credible threat in negotiations.

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## ***“Vibe Coding” is Taking Over***

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There’s a new kind of developer showing up that is spending less time in the weeds and more time describing what they want. Prompting, iterating, stitching things together. Some people are calling it “vibe coding.”

AI now handles a meaningful chunk of the actual coding on routine code, debugging, even structuring entire features. Tasks that used to take hours are now getting done in a fraction of the time.

That is changing things dramatically. It’s less about writing perfect code and more about how to guide and instruct the AI engine on what to build, and when something feels off. It takes a different skillset to be able to look at the bigger picture. It’s getting easier than ever to build things, even without a deep technical background.

The best developers won’t be the fastest typers. They’ll be the ones who can shape the output, question it, and refine it into something that actually holds up.

In a world where anyone can generate code, the edge is knowing what good/great looks like.

### **AI Coding and the Security Question**

AI can write code fast. That’s the upside. The downside is it can also introduce risk just as quickly.


The Amazon AI code incident is an example where speed outpaced control. Engineers ran into situations where AI-generated code introduced overly permissive access, unclear logic, and behavior that wasn’t fully understood until after deployment, forcing teams to go back and tighten guardrails.

As more teams lean into AI-assisted development, security and oversight, more than ever, need to become non-negotiable.

## ***Fiscal Year Ends***

Supplier	Fiscal Year End
NetApp	April 24, 2026
Oracle	May 31, 2026
Microsoft	June 30, 2026
OpenText	June 30, 2026
Cisco	July 25, 2026
Nutanix	July 31, 2026
Palo Alto Networks	July 31, 2026

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