

Realizing 2030: A Divided Vision of the Future

*Global business leaders forecast the next era of human-machine partnerships
and how they intend to prepare*

Noppadol Punyatipat

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Managing Director, Dell EMC Thailand

DELLTechnologies

The world's largest
privately controlled
technology company,
by the numbers:

\$79.9B revenue¹

Serving 99% Fortune 500

>145,000 team members

30,000 full-time customer services
and support team members

180 countries

We're a
technology leader
and innovator

\$12.8B

Investment in R&D
in 3 years

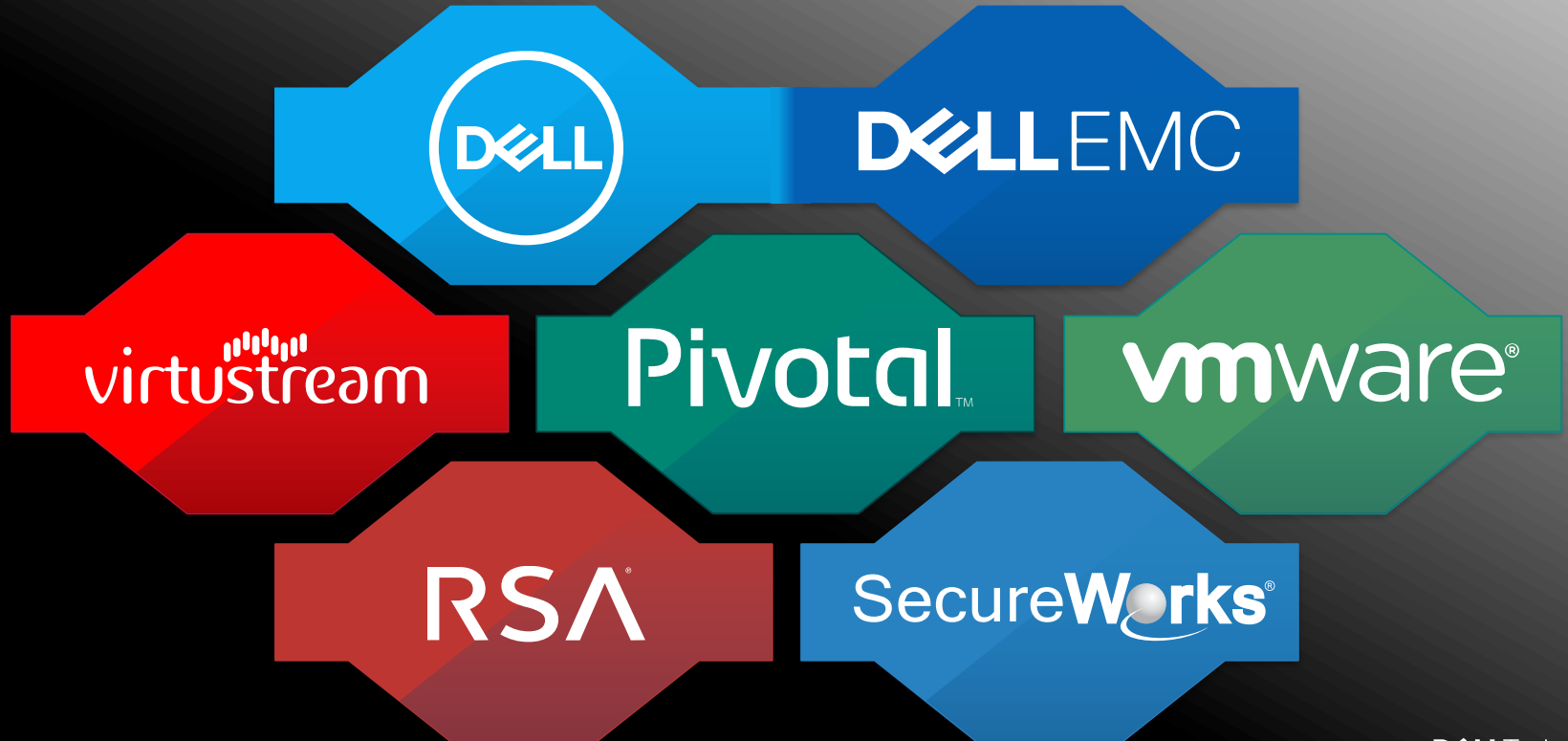
23,400

Patents and patent
applications

\$4.5B

Annual R&D investment
going forward

Individually we specialize, collectively we transform



Transforming the business

We help organizations reinvent themselves and realize their digital future.



Digital
Transformation



IT
Transformation



Workforce
Transformation



Security
Transformation

CONTENTS

An aerial photograph of a city at dusk or dawn. In the foreground, a complex multi-level highway interchange with several overpasses and ramps is visible. To the left, there are several tall, modern apartment buildings. In the background, a dense urban skyline with various skyscrapers stretches across the horizon. The sky is filled with soft, wispy clouds, and a large commercial airplane is seen flying from the upper left towards the center of the frame.

Objectives

About the Research

The Narrative & Key Findings

Summary/Snapshot of Findings

Research METHODOLOGY

Quantitative research conducted by Vanson Bourne in 2017

QUANTITATIVE

3,800

Director, c-suite from mid-size to enterprises w/key functions

- Finance
- Sales
- IT/Tech
- Customer Services
- Production & Manf.
- HR
- Marketing
- Owner/ Executive
- R & D
- Digital
- Customer Experience
- Logistics and Supply Chain

INDUSTRIES

Automotive
Financial Services
Public Healthcare
Private Healthcare
Life Sciences
Technology & Telecoms
Insurance
Manufacturing
Media & Entertainment
Oil & Gas
Retail & Consumer Products

GLOBAL REACH

17

COUNTRIES

AMERICAS

USA, Brazil, Mexico

APJ

Australia, China, India, Japan, NZ, Singapore

EMEA

France, Germany, Italy, Netherlands, UAE/ Saudi Arabia, United Kingdom, South Africa

Research EXPLORATION

What we asked

Today's digital transformation status

What success looks like

Forecast for the future – year 2030

Priorities for transformation

Tips for others



The Narrative & Key Findings

What we UNCOVERED

5 Point Narrative

1

Business leaders agree – we’re entering the **next era of human-machine partnerships**.

2

But they’re **torn** by what this means for them, their business and the world at large. We can see this **division** in the way that leaders forecast the future.

3

Leaders are struggling with the **pace of change**. They’re not moving fast enough or going deep enough to overcome common **barriers** to operating as a successful digital business.

4

However, businesses are **united** in the need to transform and how.

5

Dell Technologies Point of View - transform IT, workforce and security today in order to leap ahead.



1

Entering the
next era of human –
machine
partnerships

We've worked with machines for centuries, but our reliance on them is about to reach new levels.

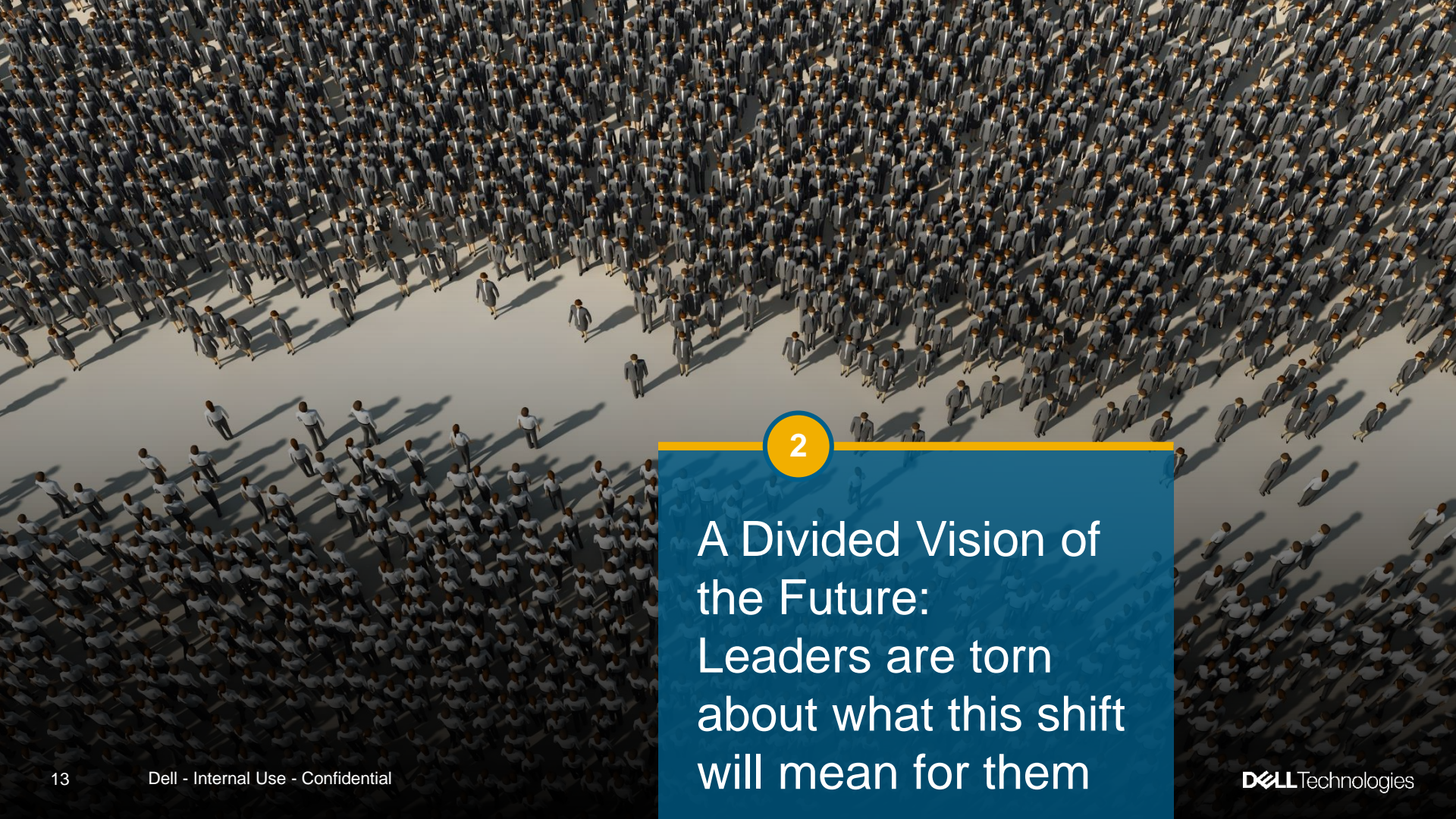
Emerging technologies will open-up amazing new possibilities, unlike anything we've seen before.

82%

say workforce and machines will work together as integrated teams in 5 years

26%

workforce and machines are **already** working together successfully as integrated teams



2

A Divided Vision of
the Future:
Leaders are torn
about what this shift
will mean for them

2030 Forecasts

Our Lives

Automated systems will free-up our time

People will take care of themselves better with healthcare tracking devices

People will absorb and manage information in completely different ways

Smart machines will work as admins in our lives – connecting our lives to highly personalized goods and services

It will be harder to disconnect from technology

AGREE

DISAGREE

50%

50%

46%

54%

54%

46%

43%

57%

42%

58%

**NB Respondents who disagree did not select the relevant answer option.*

2030 Forecasts

Our Work

We'll be more productive by collaborating more

We'll have more job satisfaction by offloading the tasks that we don't want to do to intelligent machines

Schools will need to teach how to learn rather than what to learn to prepare students for jobs that don't exist yet

We'll learn on the job with AR

Not sure what the next 10-15 years will look like for our industry, let alone our employees

AGREE

DISAGREE

49%

51%

42%

58%

56%

44%

46%

54%

50%

50%

**NB Respondents who disagree did not select the relevant answer option.*

2030 Forecasts

Business

Clear protocols will be need to be established if autonomous machines fail

The more we depend upon technology, the more we'll have to lose in the event of a cyber-attack

Computers will need to be able to decipher between good and bad commands

We'll be part of a globally connected, remote workforce

Technology will connect the right person to the right task, at the right time

AGREE

DISAGREE

50%

50%

48%

52%

45%

55%

49%

51%

41%

59%

**NB Respondents who disagree did not select the relevant answer option.*

Most likely to automate / outsource to machines




42% expect to have greater job satisfaction by outsourcing to machines

(see previous slide)

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Inventory management	42%
Financial admin (i.e. invoicing, POs)	41%
Trouble-shooting	39%
Logistics/Supply Chain (e.g. delivery drivers)	37%
Administration: Scheduling meetings, data input	37%
Product design	33%
Customer service	32%
Marketing and communications	29%
HR admin: recruitment and training	27%
Medical/health diagnoses	24%
Legal admin (i.e. drafting and amending contracts)	22%
Management of employees	21%
Sales	18%
Surgery	17%
Caring for the elderly	13%
Educating children	12%
I do not think organizations will automate	2%
Don't know	2%



All in all, we're entering the next era of human-machine partnerships.

But leaders are divided regarding what this means for them, their business and the world at large.



3

Leaders are
struggling with the
pace of change

Many aren't progressing quickly or deep enough

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ONLY 27%

say digital is ingrained in all they do

57%

are struggling to keep-up with the pace of change

42%

Don't know whether they'll be able to compete over the next decade

93%

Are battling some form of barrier to becoming a digital business in 2030

Top barriers to transforming digitally

- 1 Lack of a digital vision and strategy (61%)
- 2 Lack of workforce readiness (61%)
- 3 Technology constraints (51%)
- 4 Time and money constraints (37%)
- 5 Law and regulations (20%)

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51% admit they have ineffective cybersecurity measures in place

59% believe their workforce aren't sufficiently security savvy



4

However leaders
are unified in the
need for digital
transformation

Top tips to accelerate digital transformation

- 1 Gain employee buy-in (90%)
- 2 Make customer experience a boardroom concern (88%)
- 3 Align compensation, training and KPIs to digital goals and strategy (85%)
- 4 Put policies and tech in place to support a fully remote, flexible workforce (85%)
- 5 Empower lines of business (80%)
- 6 Teach all employees how to code / understand software development (79%)
- 7 Appoint a chief AI officer (75%)
- 8 Automate everything and encourage customers to self-serve (74%)

Although many haven't seen their advice come to fruition within their own company.

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Most believe they'll hit targets within five years

Despite an ad hoc approach to digital transformation

94% believe they'll have effective cybersecurity defenses in place

85% say R&D will drive their organization forward

90% anticipate they'll deliver their product offering as a service

81% will be using AI to pre-empt customer demands

89% believe they would have completed their transition to a software-defined business

80% will be delivering hyper-connected customer experiences with VR

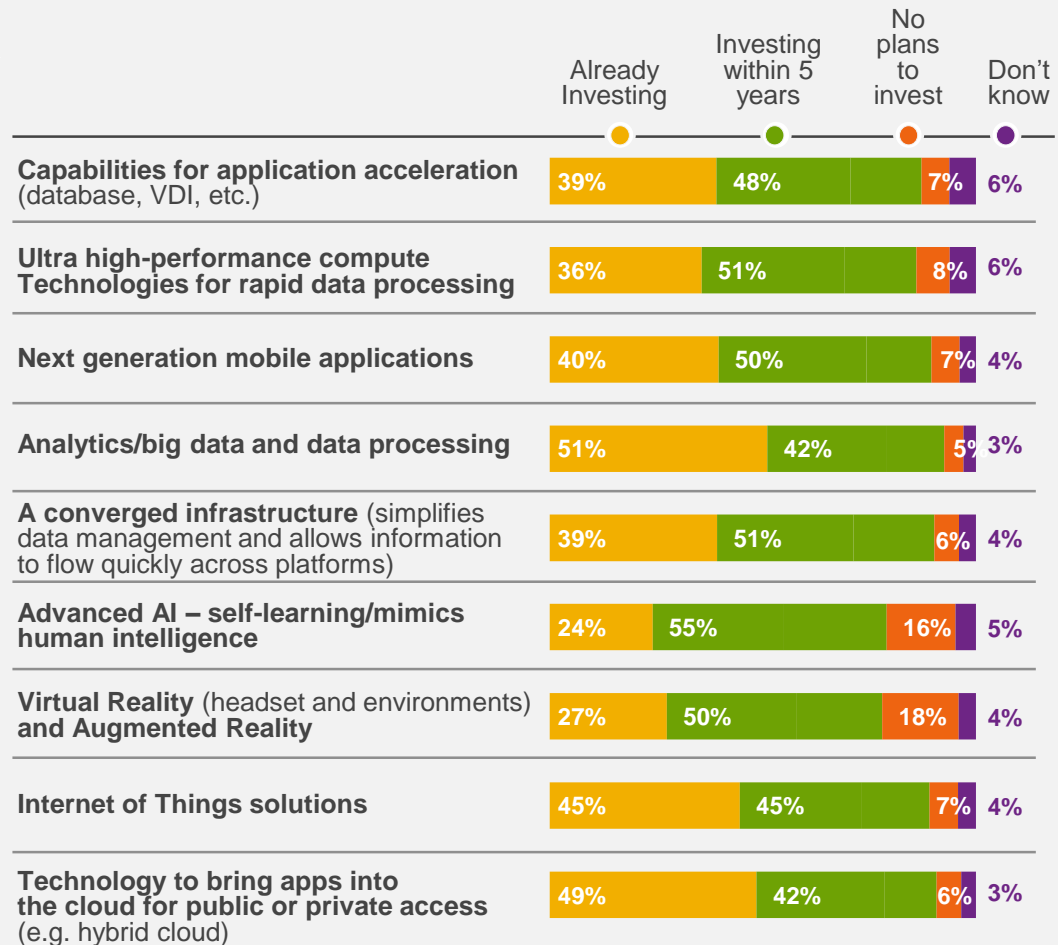
Top technology investments in the next 5 years



Businesses plan to **triple** their investments in advanced AI within five years

No. of companies investing in VR/AR will jump from **27%** to **78%** within five years

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Base: all respondents (3800)



5

Dell Technologies
conclusion:
Time waits
for no one

We're entering a **new dawn**, with immense possibility on the horizon.

Leaders are **divided** by what this means and are at **different stages of progress**. They need to **act now** to transform their IT, workforce and security in order to play a defining role in the future.

**Together, let's drive human progress and
#realize2030.**



Summary & Snapshot of Findings

Top 6 STATS – News Release

82% expect humans and machines will work as integrated teams within **5 years**

50% say automated systems will free-up their time
50% disagree

42% believe they'll have more job satisfaction in the future by offloading tasks to machines: **58% disagree**

49% say they'll be more productive by collaborating more
51% disagree

Only 27% have ingrained digital in all they do

42% don't know whether they'll be able to compete over the next decade

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