





**MAY THE
ARTIFICIAL INTELLIGENCE**

BE WITH YOU



Disruptors On the Rise: Next-Gen Partners

Charbel Zreiby

Director, Channel Presales

Middle East, Turkey & Africa

DELLTechnologies



TRANSFORMING LIVES

Advance health, education and economic opportunity initiatives to deliver enduring results for **1 billion people**.



UPHOLDING ETHICS & PRIVACY

Fully automate our data control processes, making it easier for our customers to control their personal data.



ADVANCING SUSTAINABILITY

For every product a customer buys, we will reuse or recycle an equivalent product, and **100%** of packaging and **50%+** of our product content will be made from recycled or renewable material.



CULTIVATING INCLUSION

50% of our global workforce and **40%** of our global people leaders will be those who identify as women, and **25%** of our U.S. workforce and **15%** of our U.S. people leaders will be those who identify as Black/African American and Hispanic/Latino minorities.

Our 2030 Moonshot Goals

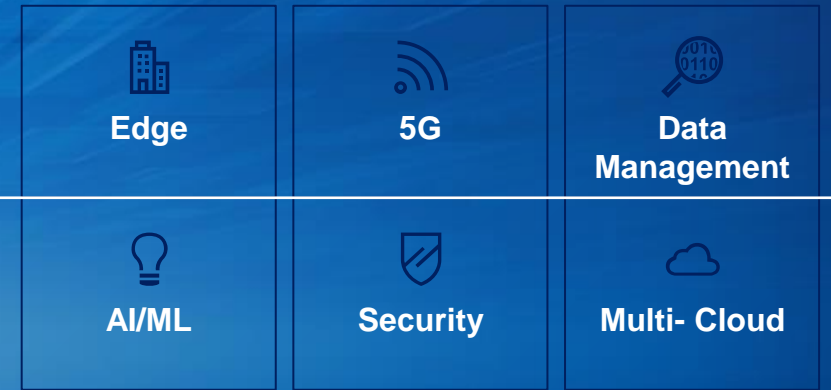
Investing for today...

and tomorrow

Modernize the core business



Build new growth businesses



\$7.6B

invested in R&D
in last 3 years

26,189

patents

11th

largest patent
generator in US

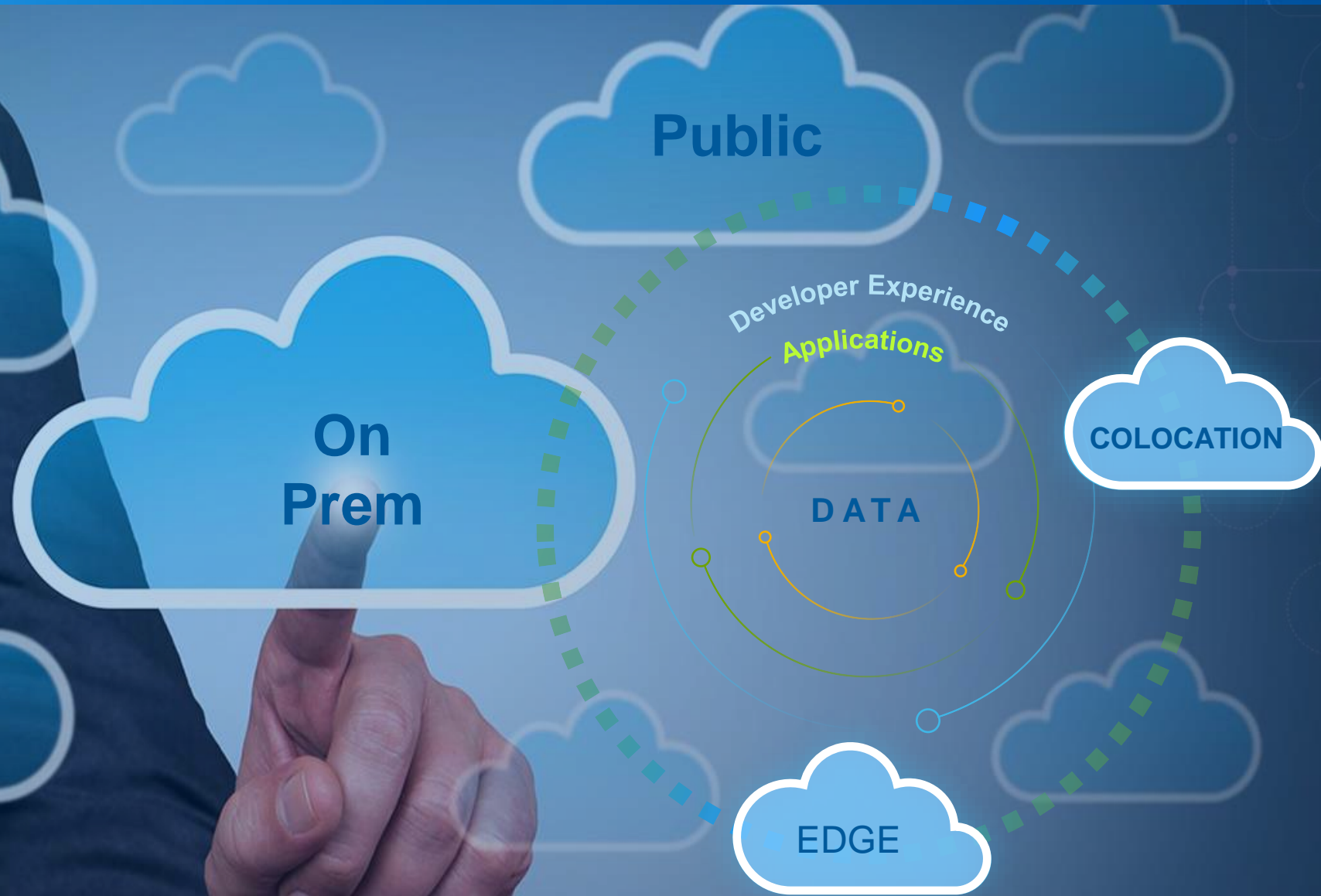
85%

of engineers are
software engineers

\$1.4B

Yearly investment
Dell Technologies
Capital

Multi-Cloud



EDGE

Manufacturing

Digital Cities

Retail

Healthcare

Transportation

The Edge:
Where data is acted on near its point of creation to generate immediate, essential value

The number of new operational processes deployed on edge infrastructure will grow from less than 20% today to over 90% in 2024.¹

¹ IDC FutureScape, "Worldwide IT Industry 2021 Predictions," October 2020.

**Who will take the
decision:
Machine or Human?**



5G

12x
faster
than 4G

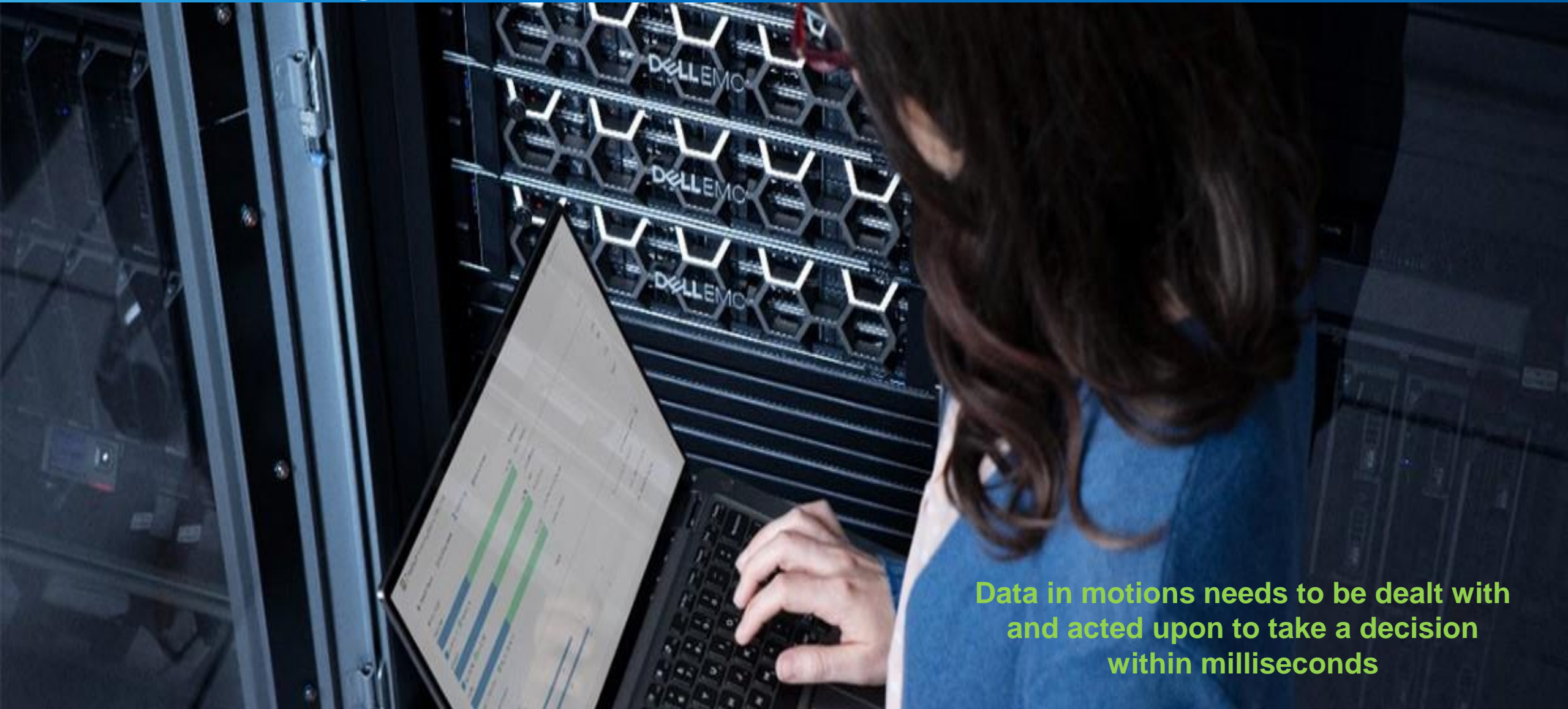
Very
Low
Latency



Connecting People

Connecting Objects

Data Management



**Data in motions needs to be dealt with
and acted upon to take a decision
within milliseconds**

Security

NIST Cybersecurity Framework Overview





Next-Gen Partners

Thrivers or Survivors?

The Need for Change



The market is changing

fast and accelerating

Customers want higher value outcomes

with new decision makers in accelerated timelines.

Partners are adapting their business models

and routes to market to address evolving customer needs.

Future Partner landscape trends

INDUSTRY IMPACT

PARTNER IMPACT

1

Digital Transformation

Customers are demanding ways to transform and automate their operations using AI/ML, driving demand for Edge & Multicloud

Partners Develop Own IP

Solution Providers' differentiation and profitability is driven by their own IP and consultative skills to facilitate customer transformation

2

Everything as a Service

The Compute and Storage Cloud HW TAM is projected to reach \$133.7B by 2026 growing at a CAGR of 12.6%*

Shift from Selling to Servicing

Partners pivot to customer success to focus on the expansion, upsell & renewal of recurring revenues

3

Evolving Ecosystem

Increased complexity leads to multiple partners collaborating on the same opportunities

Evolving Partner Roles

The ecosystem orchestrator becomes the new trusted advisor, and anyone could play that role

* IDC: <https://www.idc.com/getdoc.jsp?containerId=prUS48998722>

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