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Digital Transformation Index 2020

Vanson Bourne Research Findings & Methodology

Global benchmark indicates businesses' status of digital transformation across the globe and how they are performing in this digital age.

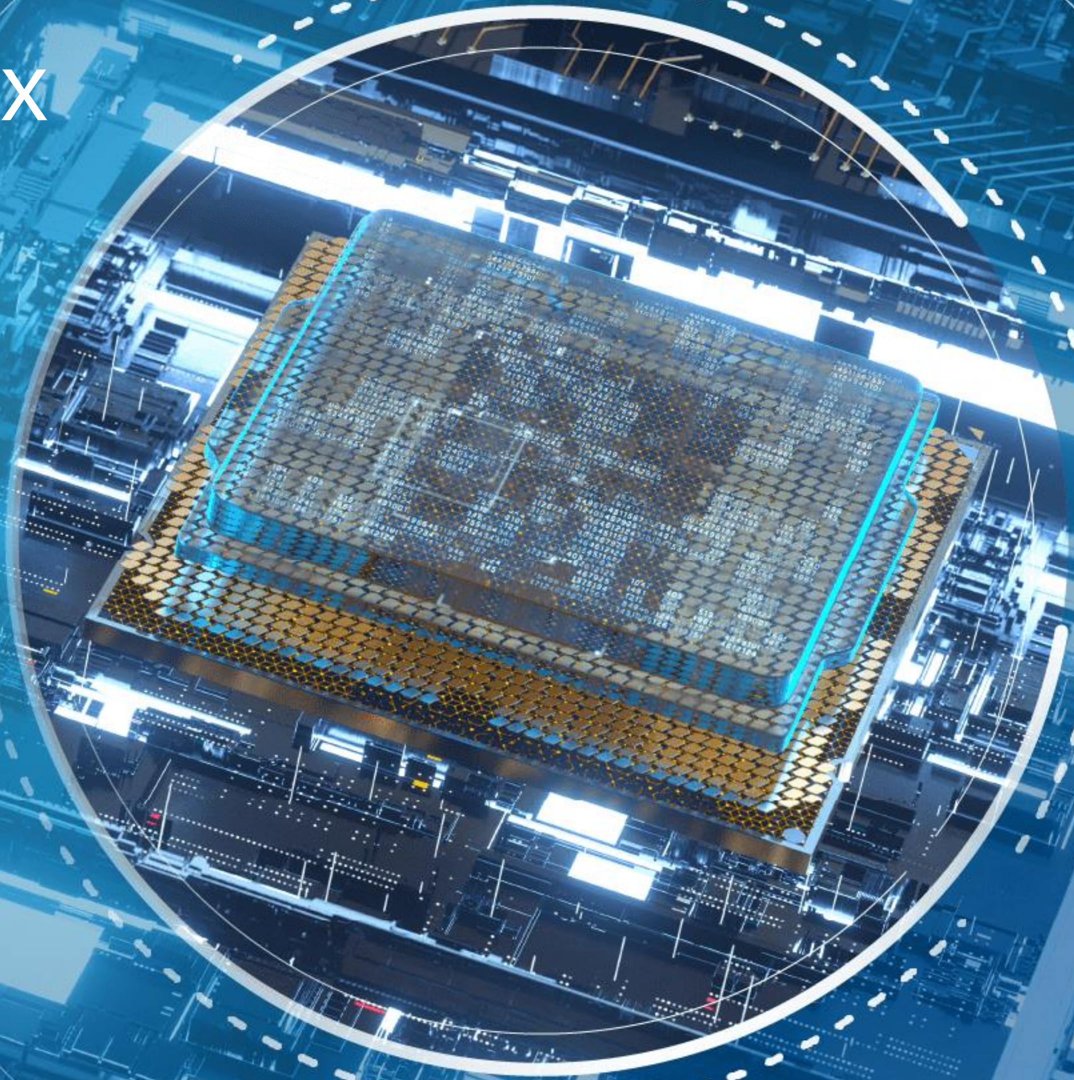

Table of Contents

01 Research Methodology

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Research Methodology

Vanson Bourne

Biennial study

The DT Index debuted in 2016 to create a repeatable methodology that maps digital transformation progress of mid- to large-sized companies across the world. The DT Index was run again in 2018, and now also in 2020.

4,300 QUANTITATIVE
Reponses from Director, C-Suite, mid-size to enterprise w/key functions

- Finance
- Sales
- IT/Tech
- Customer services
- Marketing
- Production & Manufacturing
- Owner/ Executive
- R&D
- Digital
- Customer Experience
- Logistics & Supply Chain

13 INDUSTRIES

- Automotive
- Financial Services
- Public Healthcare
- Private Healthcare (combined with public healthcare in reporting)
- Insurance
- Life Sciences
- Manufacturing
- Media and Entertainment
- Oil and Gas
- Retail and Consumer
- Technology
- Telecoms
- Other commercial

18 COUNTRIES

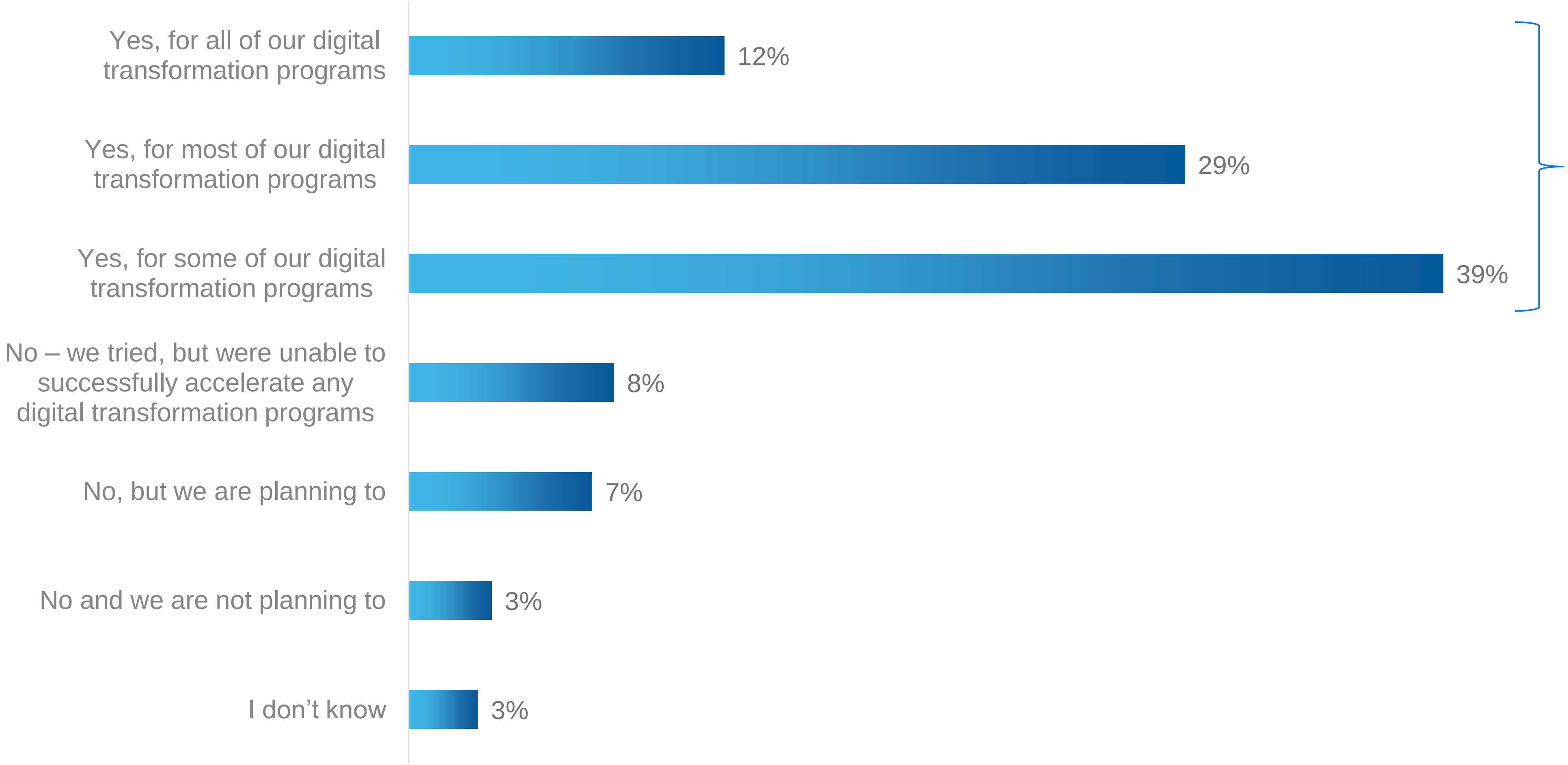
AMERICAS
Brazil, Canada, Mexico, US

APJC
Australia, China, India, Japan, New Zealand (combined with Australia in reporting), Singapore

EUROPE
France, Germany, Italy, Netherlands, Poland, Spain, Sweden, UK

02 Pace of Transformation

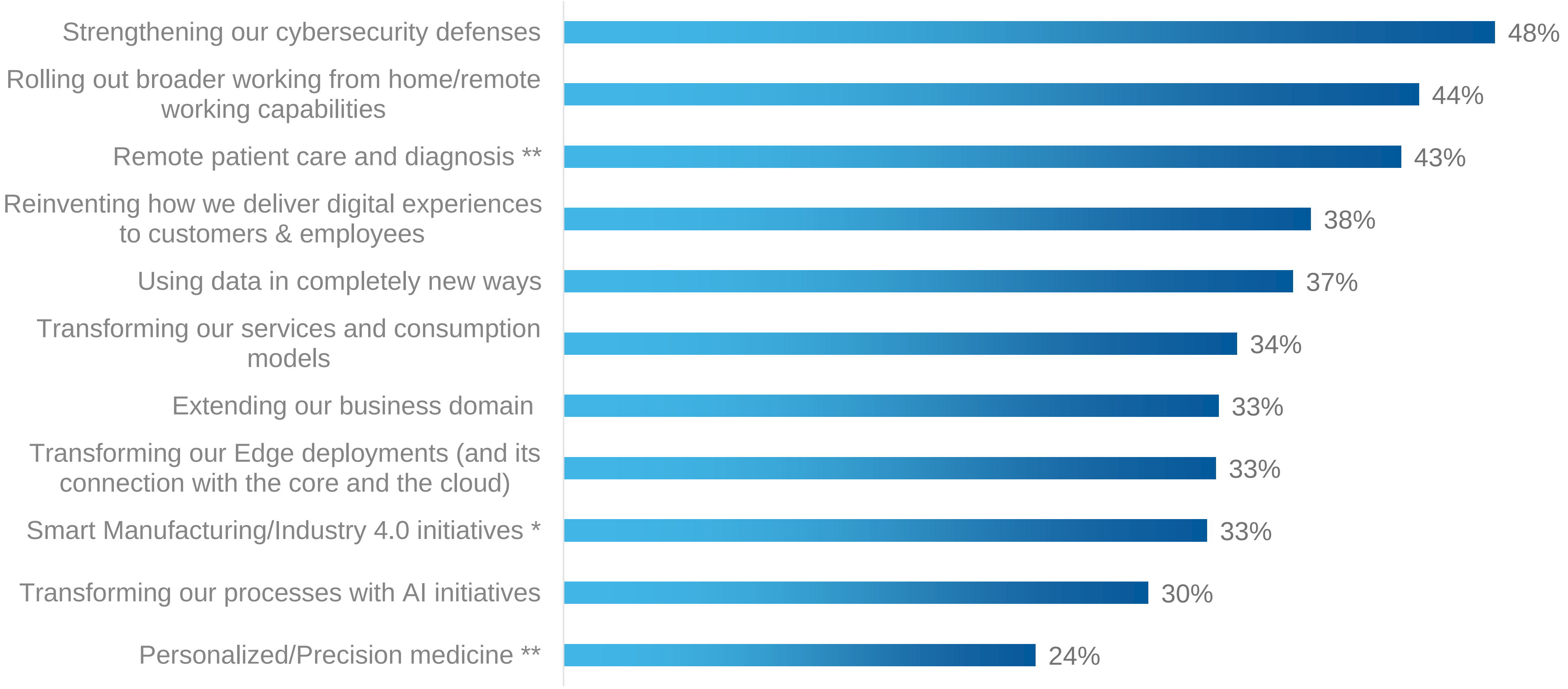
Successful Acceleration Of Digital Transformation Programs



80% have successfully accelerated at least some of their digital transformation programs this year

"Have you successfully accelerated any of your digital transformation programs this year?" Base: all 2020 respondents (4300)

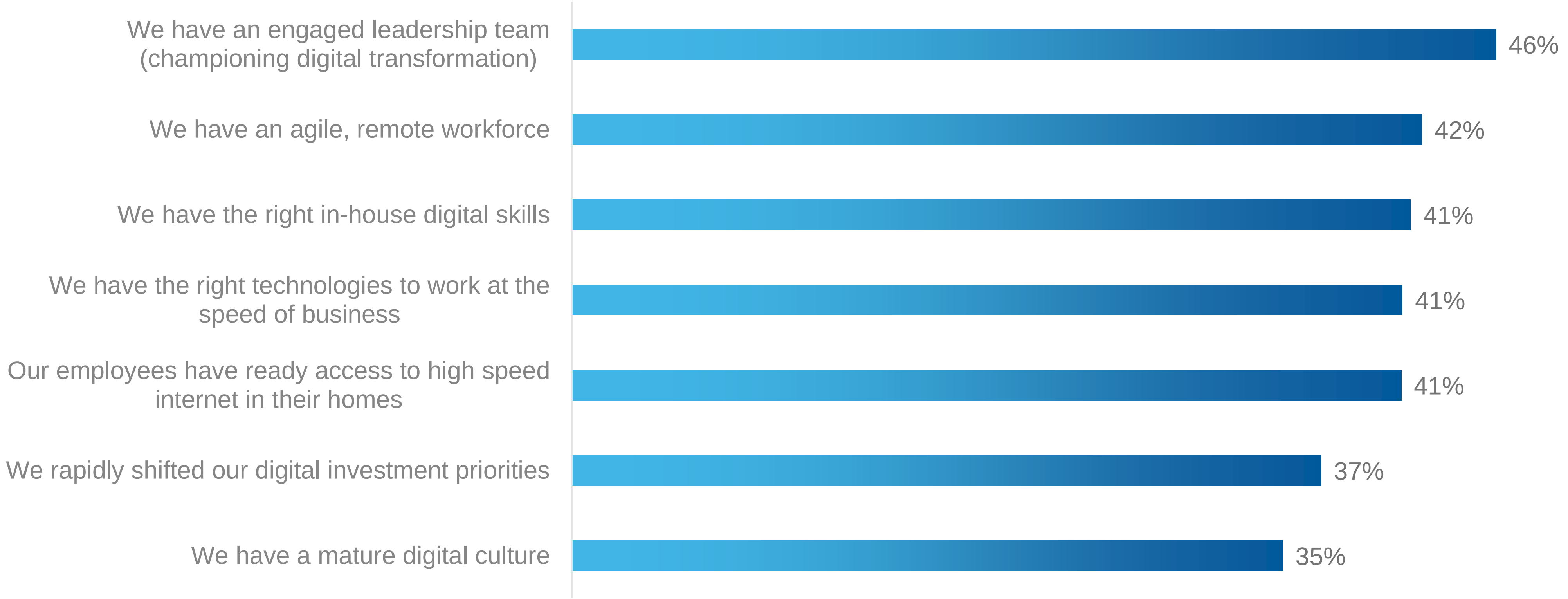
Digital Transformation Programs Accelerated



Strengthening cybersecurity and remote work capabilities have been the most accelerated areas of digital transformation programs in 2020

"Which digital transformation programs have you successfully accelerated this year?" Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), except asterisked answer options. Not showing "Other" or "Don't know" options
* Indicates answer only shown to respondents from the manufacturing industry
** Indicates answer only shown to respondents from the public and private healthcare industries

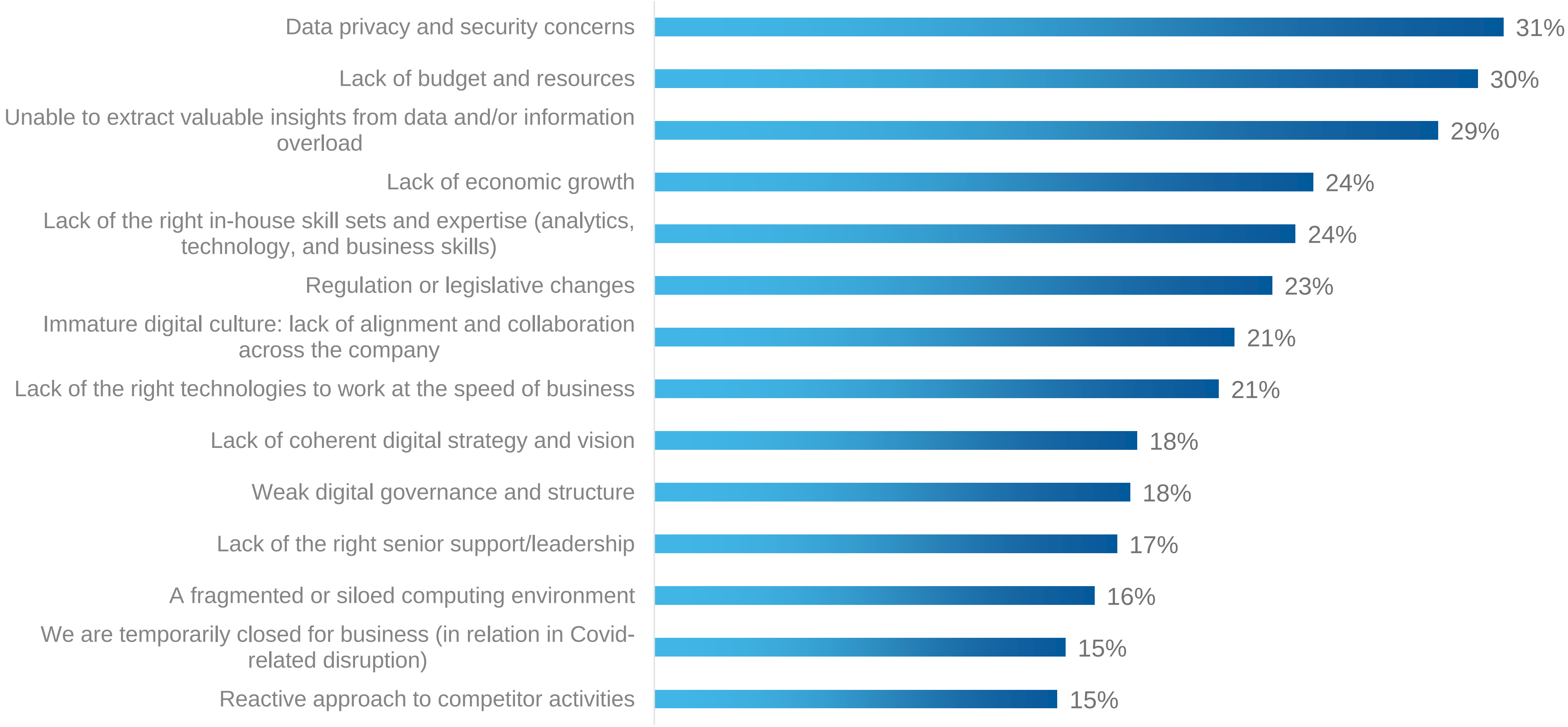
Acceleration Enablers



"What enabled you to successfully accelerate your transformation programs?" Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427).

03 Barriers to Transformation

Barriers To Digital Progress



Data privacy concerns and lack of budget continue to be the two primary barriers to digital transformation, as they were in 2018

“What are the main barriers to digitally transforming your organization?“ Base: all 2020 respondents (4300)
Not showing respondents who selected “Other” or “There are no barriers”

Barriers To Digital Progress: Historical Comparison

2016	
1	Lack of budget & resources
2	Lack of the in-house right skills sets and expertise
3	Lack of senior support/leadership
4	Lack of the right tech to work at the speed of business
5	Data privacy & security concerns
6	Reactive approach to competitor activities
7	Lack of a coherent digital strategy & vision
8	Immature digital culture
9	Regulation & legislative changes
10	A fragmented or siloed computing environment
11	*Unable to extract valuable insights from data and/or information overload
12	Weak digital governance & structure

2018	
1	Data privacy & security concerns
2	Lack of budget & resources
3	*Unable to extract valuable insights from data and/or information overload
4	Lack of the in-house right skills sets and expertise
5	Regulation & legislative changes
6	Immature digital culture
7	Lack of the right tech to work at the speed of business
8	Lack of senior support/leadership
9	Lack of a coherent digital strategy & vision
10	Weak digital governance & structure
11	Reactive approach to competitor activities
12	A fragmented or siloed computing environment

2020	
1	Data privacy & security concerns
2	Lack of budget & resources
3	*Unable to extract valuable insights from data and/or information overload
4	NEW Lack of economic growth
5	Lack of the in-house right skills sets and expertise
6	Regulation & legislative changes
7	Immature digital culture
8	Lack of the right tech to work at the speed of business
9	Lack of a coherent digital strategy & vision
10	Weak digital governance & structure
11	Lack of senior support/leadership
12	A fragmented or siloed computing environment
13	NEW We are temporarily closed for business (in relation in Covid-related disruption)
14	Reactive approach to competitor activities

"What are the main barriers to digitally transforming your organization?" Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000) * Indicates answer option asked and reported on as two separate options in 2016 and 2018

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04 How Will Organizations Transform?

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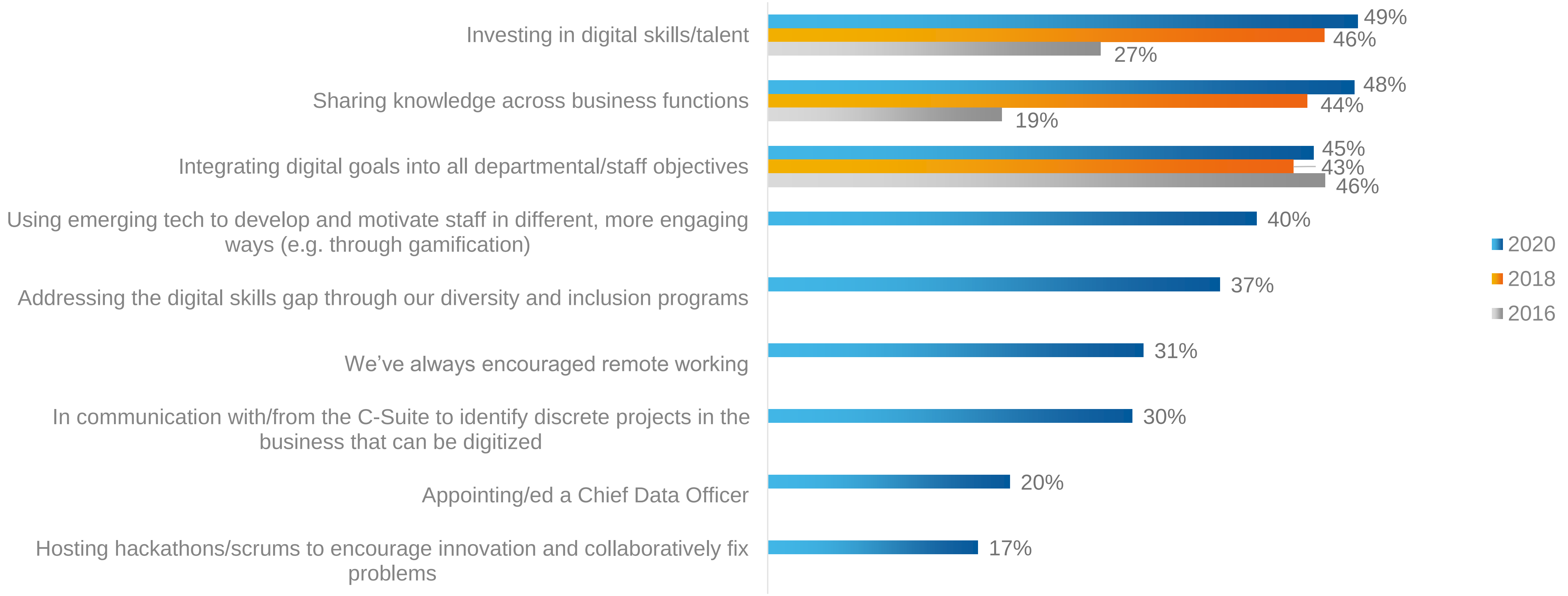
How Organizations Are Transforming Today



"Thinking about what a digital business looks like, which of the following is your organization doing?" Base: Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000)

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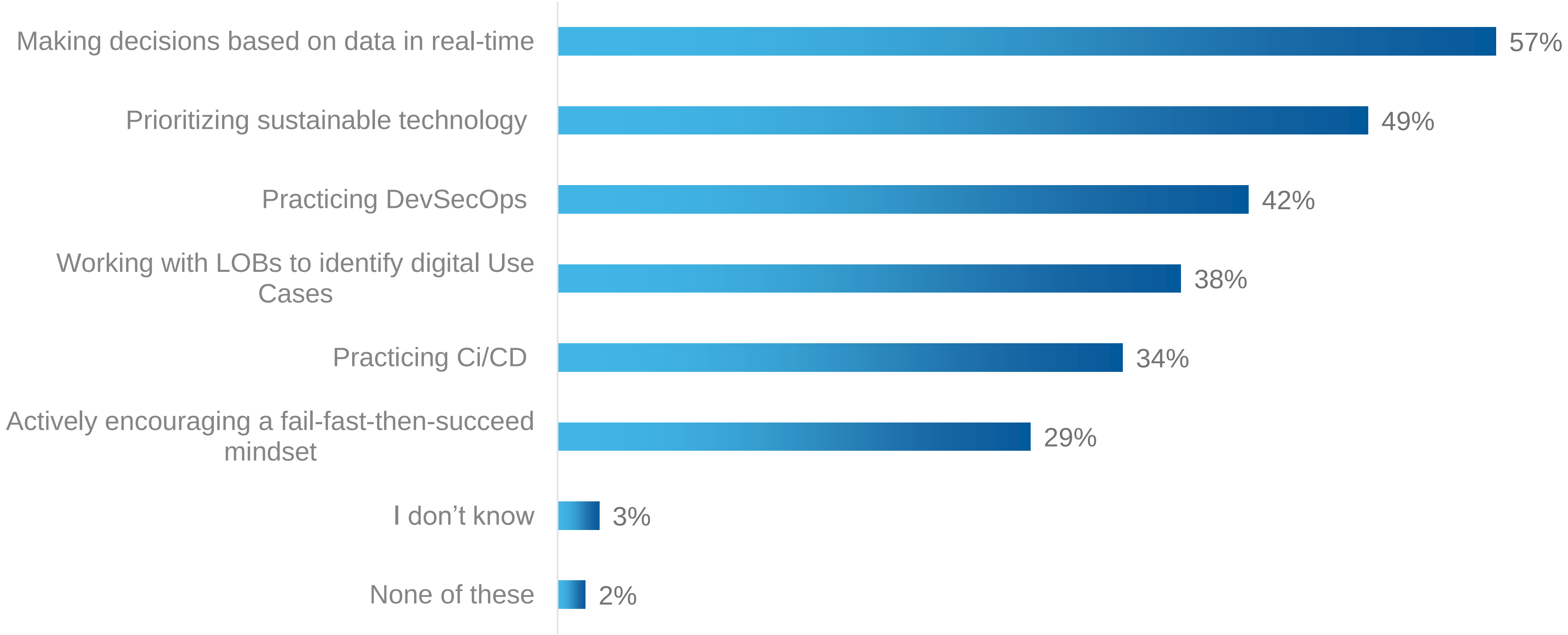
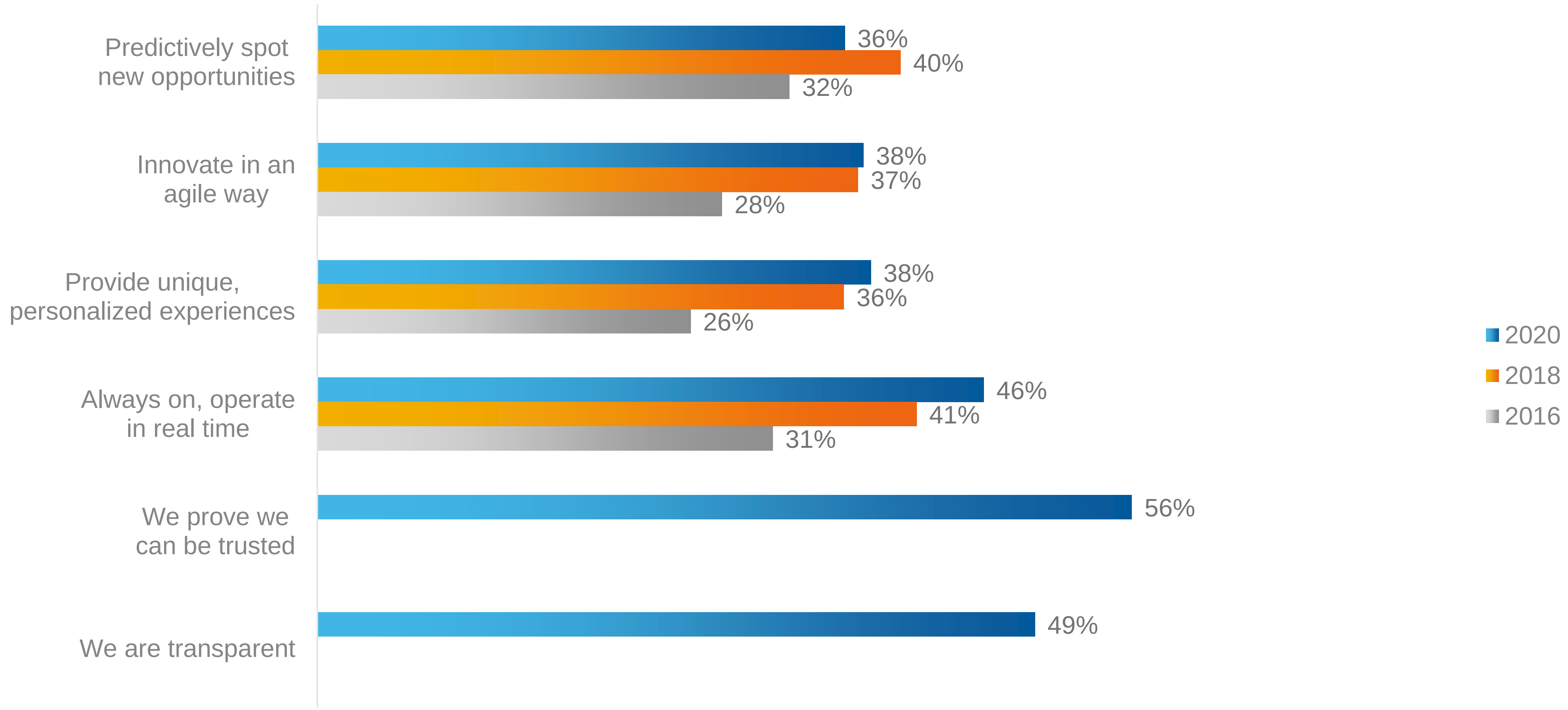
Digital Transformation Strategies



Most businesses are now making decisions based on data in real-time.

"Thinking about your digital transformation strategy, which of the following is your organization doing?" Base: all 2020 respondents (4300)

Addressing the Following ‘Attributes of a Digital Business’



“How is your organization addressing each of the below to stay competitive and succeed in this increasingly digital world?” Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000). Showing the proportion of respondents who selected “Doing well, organization-wide”

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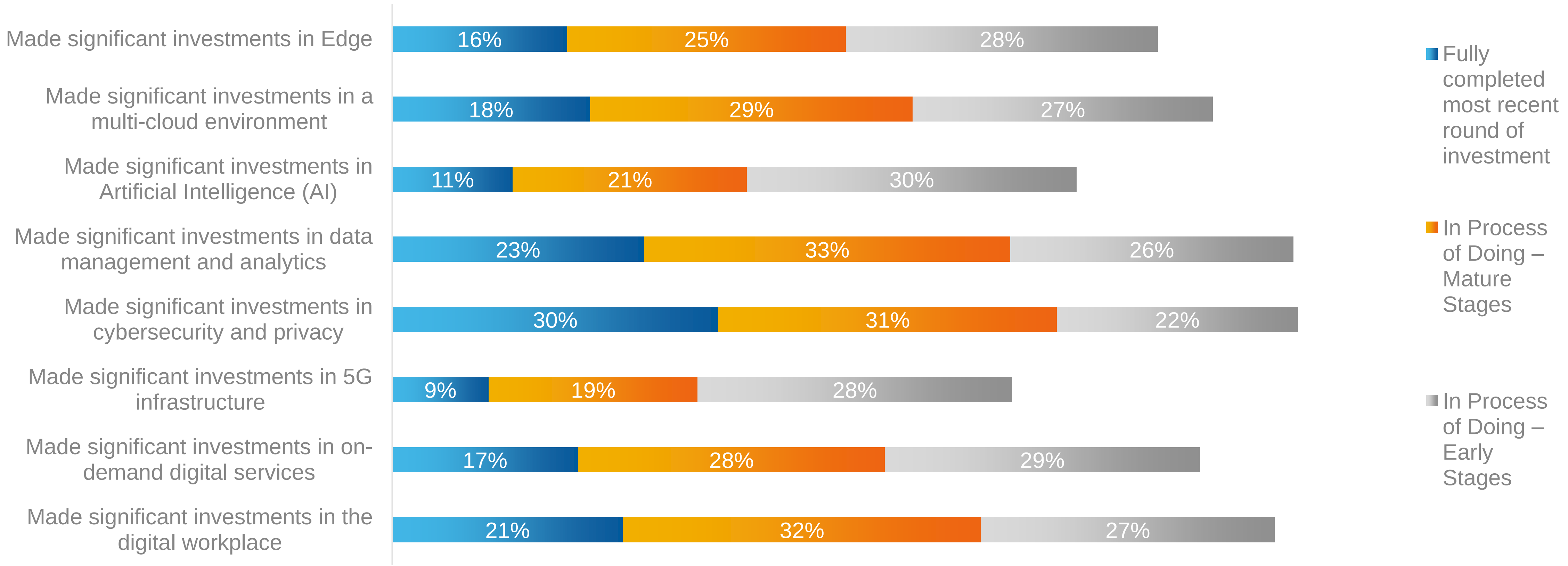
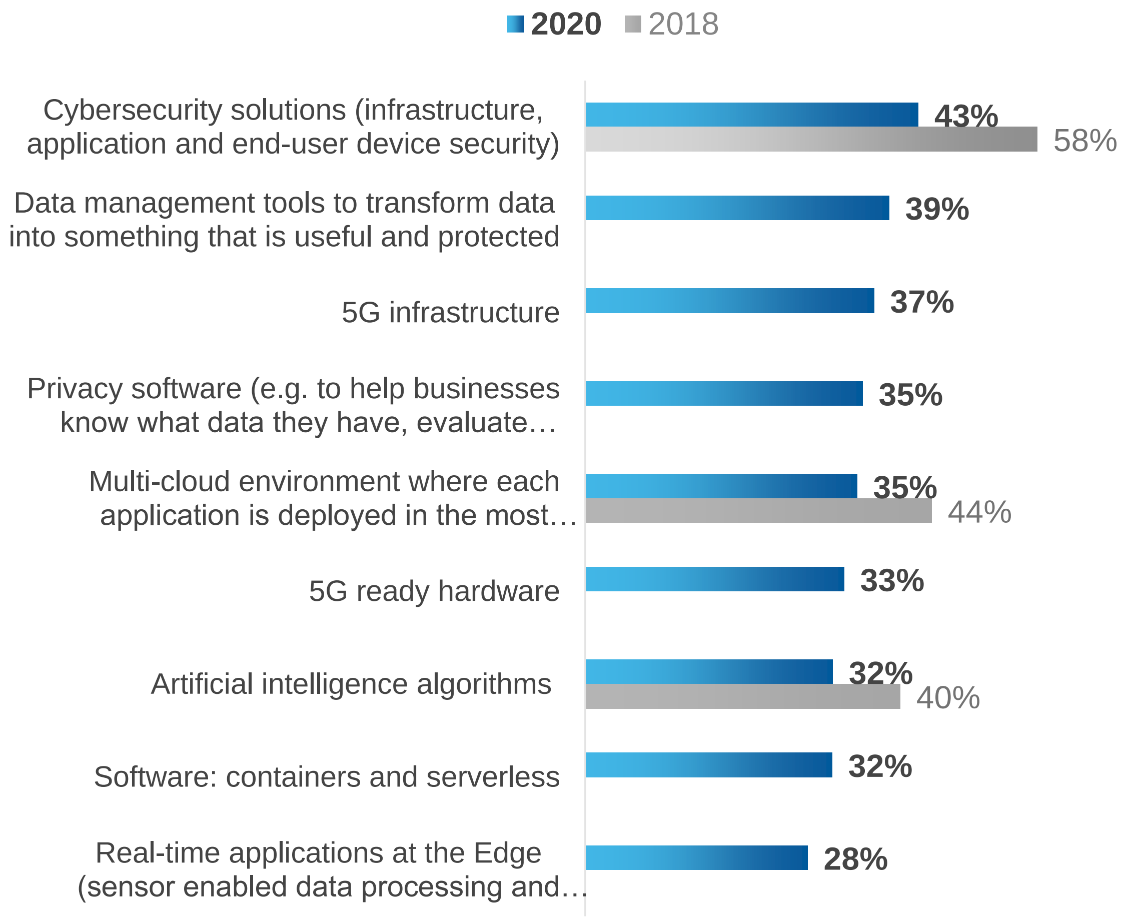
05 Areas of Investment

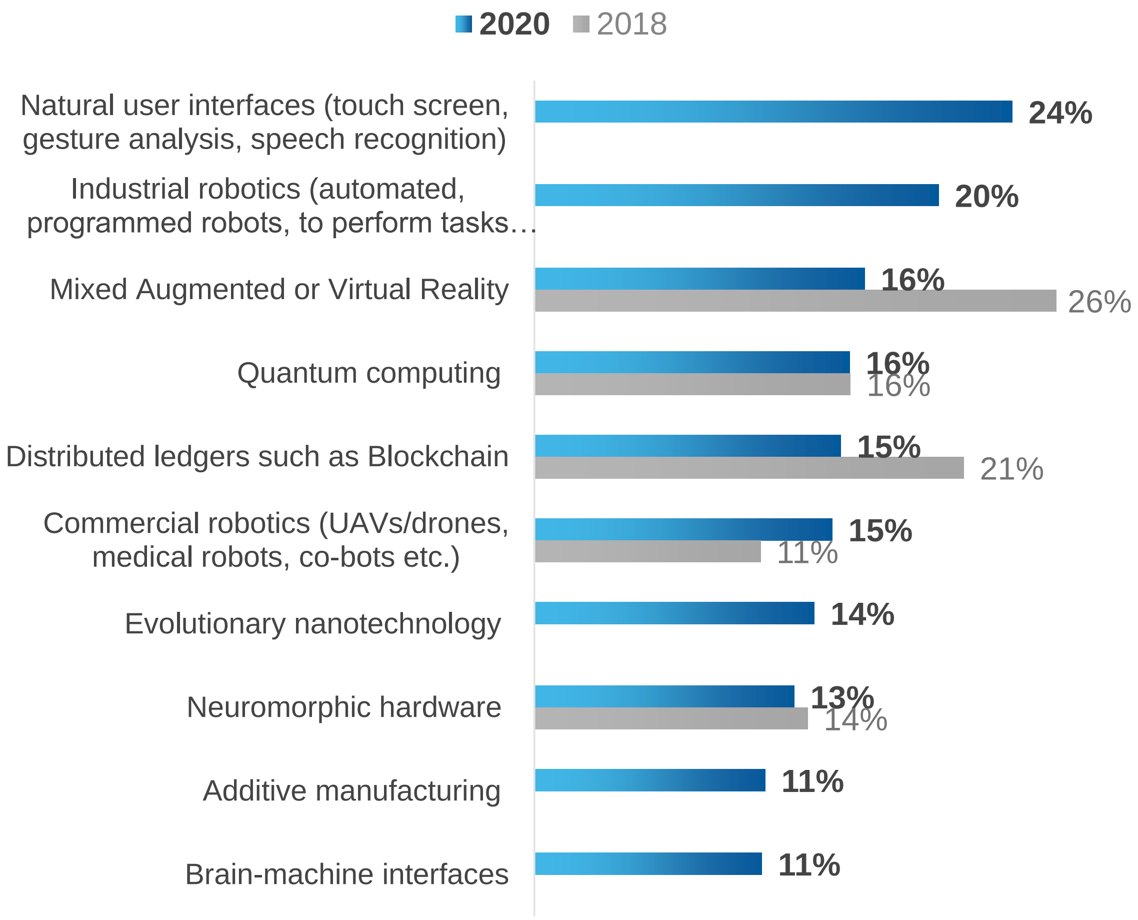
Current Investments in Digital Technology



"In terms of your organization's existing IT strategy, to what extent are you doing the following to support your digital business transformation?"
Base: all 2020 respondents (4300). Not showing "Don't know" answers

Technology Investment Plans Over the Next 1-3 Years: High to Low





"What new innovations or solutions is your organization investing in over the next 1-3 years to enable digital business?" Base: all 2020 respondents (4300), all 2018 respondents (4600). Comparisons shown for options asked in 2018

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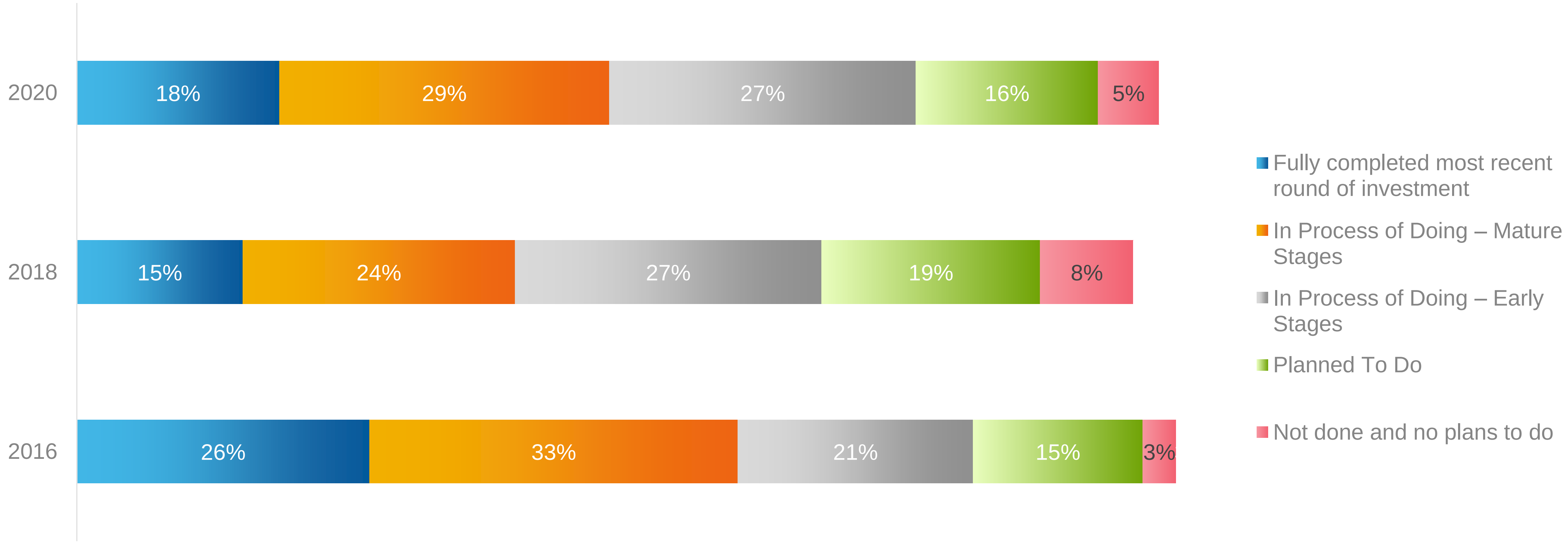
Investment in Multi-Cloud Environments: Year On Year Breakdown



"In terms of your organization's existing IT strategy, to what extent are you doing the following to support your digital business transformation? Made significant investments in a multi-cloud environment" Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000). Not showing "Don't know" answers

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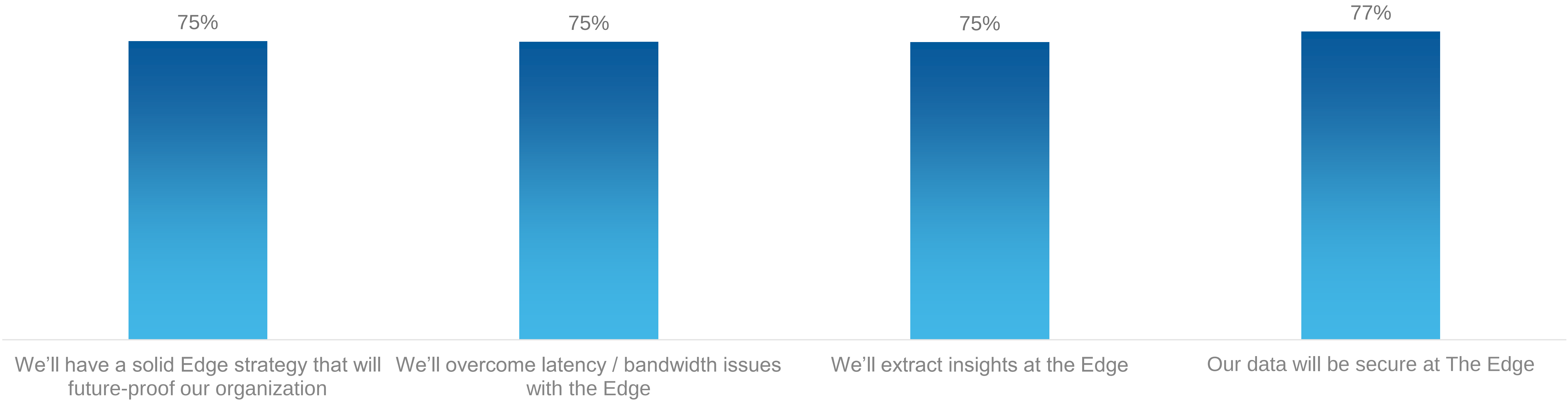
Future Hopes for Edge Computing



"How confident are you that your organization will achieve the following, over the next 12 months, by investing in Edge?" Base: respondents who have, are currently or plan to invest in Edge (3782). Showing the proportion of respondents who selected "Very confident" or "Fairly confident"

06 The Digital Transformation Index III Benchmark Methodology

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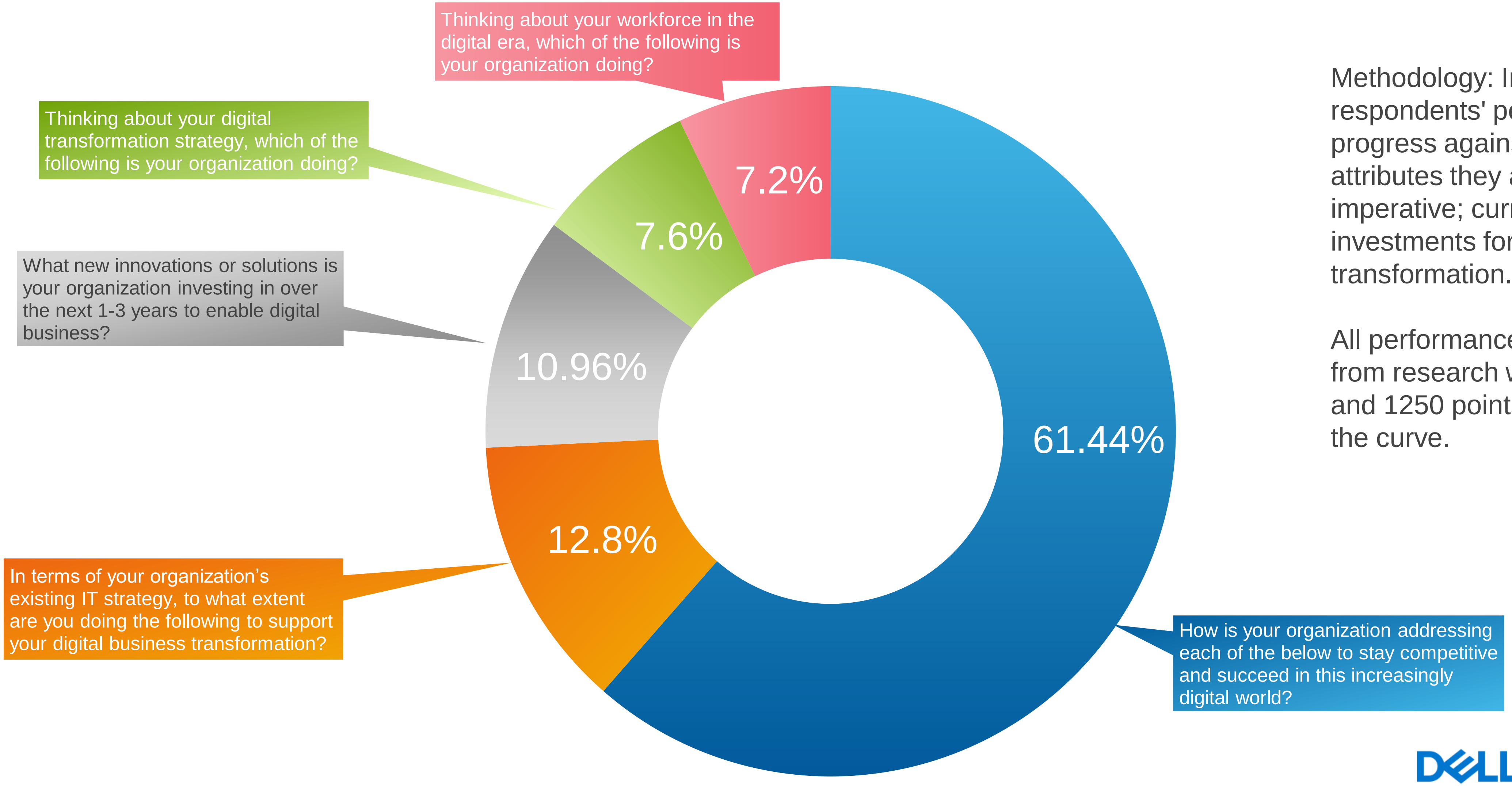
Question Weighting For DT Index



Methodology: Index based on respondents' performance and progress against digital business attributes they agreed were imperative; current and planned investments for digital transformation.

All performance related questions from research were filtered through, and 1250 points allocated across the curve.

Benchmark Questions and Scores (i)

How is your organization addressing each of the below to stay competitive and succeed in this increasingly digital world?

- Predictively spot new opportunities
- Innovate in an agile way
- We prove we can be trusted
- We are transparent
- Provide unique, personalized experiences
- Always on, operate in real time

For each of the above, respondents selected one of the below statements (score in brackets):

Doing well, organization-wide **(128 points)**
Doing well, in pockets of the organization (e.g. some regions/departments) **(70 points)**
Not doing well, organization-wide **(20 points)**
Not doing well, in pockets of the organization **(10 points)**
Research/planning stage **(5 points)**
No plans **(0 points)**
I don’t know **(0 points)**

Maximum score = 768 points

In terms of your organization’s existing IT strategy, to what extent are you doing the following to support your digital business transformation?

- Made significant investment in Edge (bringing computation, connectivity and data storage closer to where it is needed rather than waiting for data to be sent to the cloud and back)
- Made significant investments in a multi-cloud environment
- Made significant investments in Artificial Intelligence (AI)
- Made significant investments in data management and analytics
- Made significant investments in cybersecurity and privacy
- Made significant investments in 5G infrastructure
- Made significant investments in on-demand digital services
- Made significant investments in the digital workplace

For each of the above, respondents selected one of the below statements (score in brackets):

Fully completed most recent round of investment **(20 points)**
In process of doing – mature stages **(15 points)**
In process of doing – early stages **(10 points)**
Planned to do **(3 point)**
Not done and no plans to do **(0 points)**
I don’t know **(0 points)**

Maximum score = 160 points

Benchmark Questions and Scores (ii)

What new innovations or solutions is your organization investing in over the next 1-3 years to enable digital business?

- Artificial intelligence algorithms (near-autonomous/ learning technology, trained to automatically answer questions, discover insights and provide recommendations) **(11 points)**
- Real-time applications at the Edge (sensor enabled data processing and location aware technologies that can send and receive data) **(11 points)**
- Quantum computing (use the properties of quantum physics to store data and perform computations; resulting in a leap in processing power) **(0 points)**
- Neuromorphic hardware (an electronic system for information processing. It resembles the behavior of a biological nervous system, can learn from its inputs and requires very little power) **(6 points)**
- Brain-machine interfaces (devices that enable its users to interact with computers by mean of brain-activity only) **(0 points)**
- Evolutionary nanotechnology (in shaping matter at the atomic and molecular scale, nanotechnology offers the potential for new, faster kinds of computers and more efficient power sources) **(0 points)**
- Additive manufacturing (creates three dimensional objects by depositing materials, usually in layers) **(5 points)**
- Mixed Augmented or Virtual Reality **(11 points)**
- Natural user interfaces (touch screen, gesture analysis, speech recognition) **(11 points)**
- Distributed ledgers such as Blockchain **(6 points)**
- 5G ready hardware **(5 points)**
- 5G infrastructure **(5 points)**
- Data management tools to transform data into something that is useful and protected **(11 points)**
- Cybersecurity solutions (infrastructure, application and end-user device security) **(11 points)**
- Privacy software (e.g. to help businesses know what data they have, evaluate their risks and disclose data to customers upon request) **(11 points)**
- Commercial robotics (UAVs/drones, medical robots, co-bots etc.) and/or Industrial robotics (automated, programmable robots, to perform tasks with high precision and repeatability) **(11 points)**
- Software: containers (standard unit of software that packages up code and all its dependencies so the application runs quickly in any IT infrastructure) and serverless (built on next-generation cloud services that auto-scale and charge only when used) **(11 points)**
- Multi-cloud environment where each application is deployed in the most appropriate cloud (private, public or hybrid) **(11 points)**
- We are not investing in any technology initiatives to enable digital business **(0 points)**
- I don't know **(0 points)**

Respondents scored for each of the above (score in brackets)

Maximum score = 137 points

Benchmark Questions and Scores (iii)

Thinking about your digital transformation strategy, which of the following is your organization doing?

- Practicing Ci/CD (continuous integration, continuous delivery) **(18 points)**
- Actively encouraging a fail-fast-then-succeed mindset **(18 points)**
- Working with LOBs to identify digital Use Cases **(18 points)**
- Practicing DevSecOps (creating a ‘security as a code’ culture. Building robust security and privacy protocols into all devices, applications and algorithms) **(18 points)**
- Making decisions based on data in real-time **(18 points)**
- Prioritizing sustainable technology (i.e. using recyclable material/technologies that use less power) **(5 points)**
- I don’t know **(0 points)**
- None of these **(0 points)**

Respondents scored for each of the above (score in brackets)

Maximum score = 95 points

Thinking about your workforce in the digital era, which of the following is your organization doing?

- Integrating digital goals into all departmental/staff objectives **(10 points)**
- Sharing knowledge across business functions (for example, equipping IT leaders with business skills and business leaders with IT skills and / or dispatching IT staff to specific LoB departments) **(10 points)**
- Appointing/ed a Chief Data Officer **(10 points)**
- In communication with/from the C-Suite to identify discrete projects in the business that can be digitized **(10 points)**
- Investing in digital skills/talent (i.e. teaching all employees how to code, training IT staff on automation, cloud, etc.) **(10 points)**
- Hosting hackathons/scrums to encourage innovation and collaboratively fix problems **(10 points)**
- We’ve always encouraged remote working **(10 points)**
- Addressing the digital skills gap through our diversity and inclusion programs **(10 points)**
- Using emerging tech to develop and motivate staff in different, more engaging ways (e.g. through gamification) **(10 points)**
- I don’t know **(0 points)**
- None of these **(0 points)**

Respondents scored for each of the above (score in brackets)

Maximum score = 90 points

Benchmark – Overall Maturity Distribution

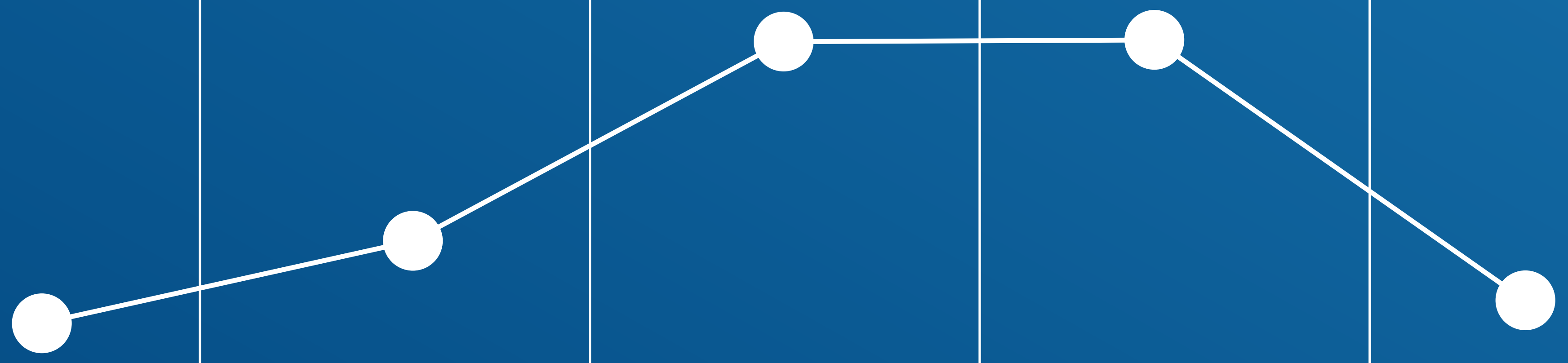
VARIABLES	DIGITAL LAGGARDS	DIGITAL FOLLOWERS	DIGITAL EVALUATORS	DIGITAL ADOPTERS	DIGITAL LEADERS
ATTRIBUTE PERFORMANCE	Not done, in planning	Limited to pockets, poorly done	Spread more widely yet not done well	Done well in pockets	Well done and organization wide
DIGITAL INITIATIVES	Limited	A small number	4-5 initiatives	5-6 initiatives	8+ adopted
ADOPTED CURRENTLY	Little or none	In planning or early stages	Early to mid stages	In mature stage, few fully completed	Most fully completed
IT STRATEGY & DIGITAL INVESTMENT	Very few in line	A handful in scope	3-4 innovations in scope for future investment	Growing number of innovations (4-6)	8+ in line for future investment
INNOVATION & FUTURE INVESTMENT	3%	13%	39%	39%	6%

07 The Digital Transformation Index III Rankings and Digital Maturity

Digital Transformation Index 2020

How are companies performing?

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan, limited initiatives and investment in place	**Very few digital investments: tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
3%	13%	39%	39%	6%



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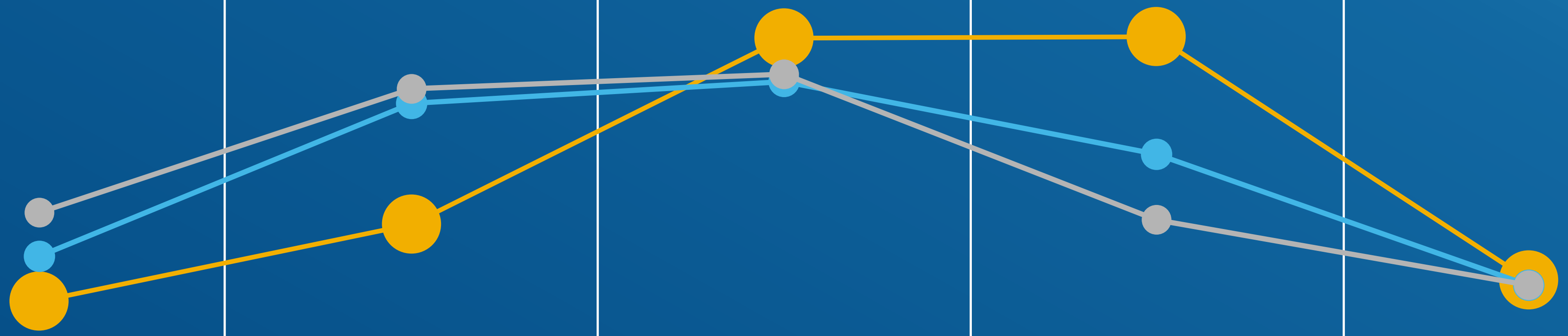
Digital Transformation Index

Year on Year Comparison

	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
	No digital plans; limited initiatives and investments	Very few investments: tentative plans	Gradual digital transformation and planning	Mature digital plans, investments and innovations in place	Digital ingrained in DNA
	6% improvement	17% improvement	6% rise	16% rise	1% rise



	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**3%**	**13%**	**39%**	**39%**	**6%**
2018	9%	30%	33%	23%	5%
2016	15%	32%	34%	14%	5%

Benchmarking group respondents fell into. Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000)

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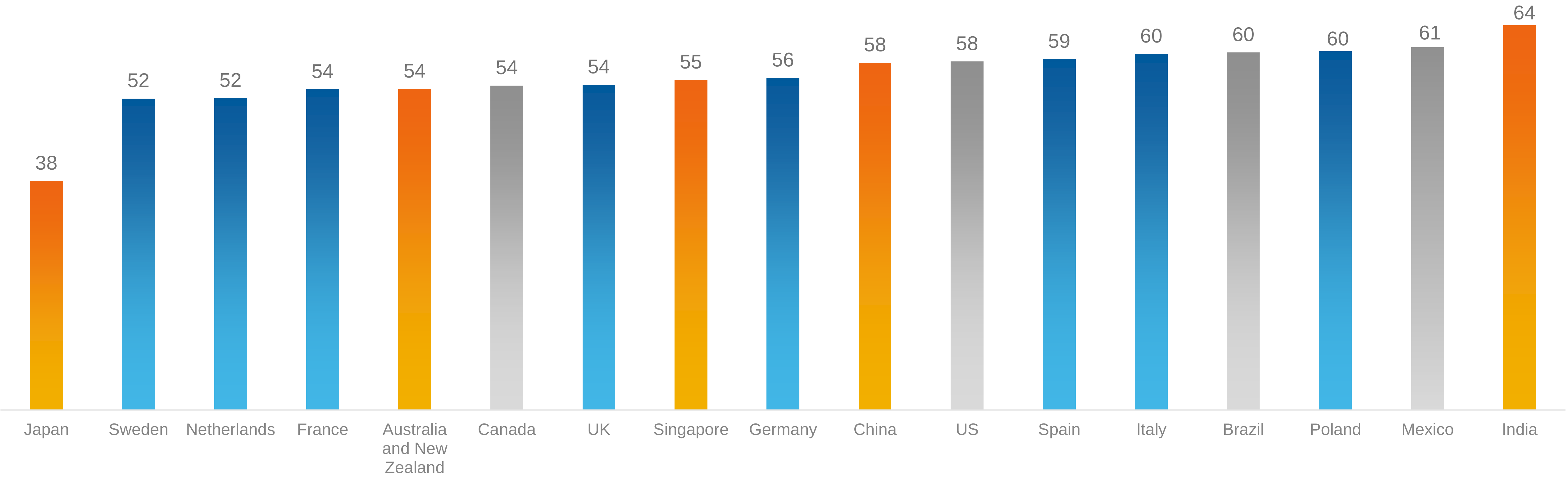
Maturity by Country/Sub-Region

Average score out of 100

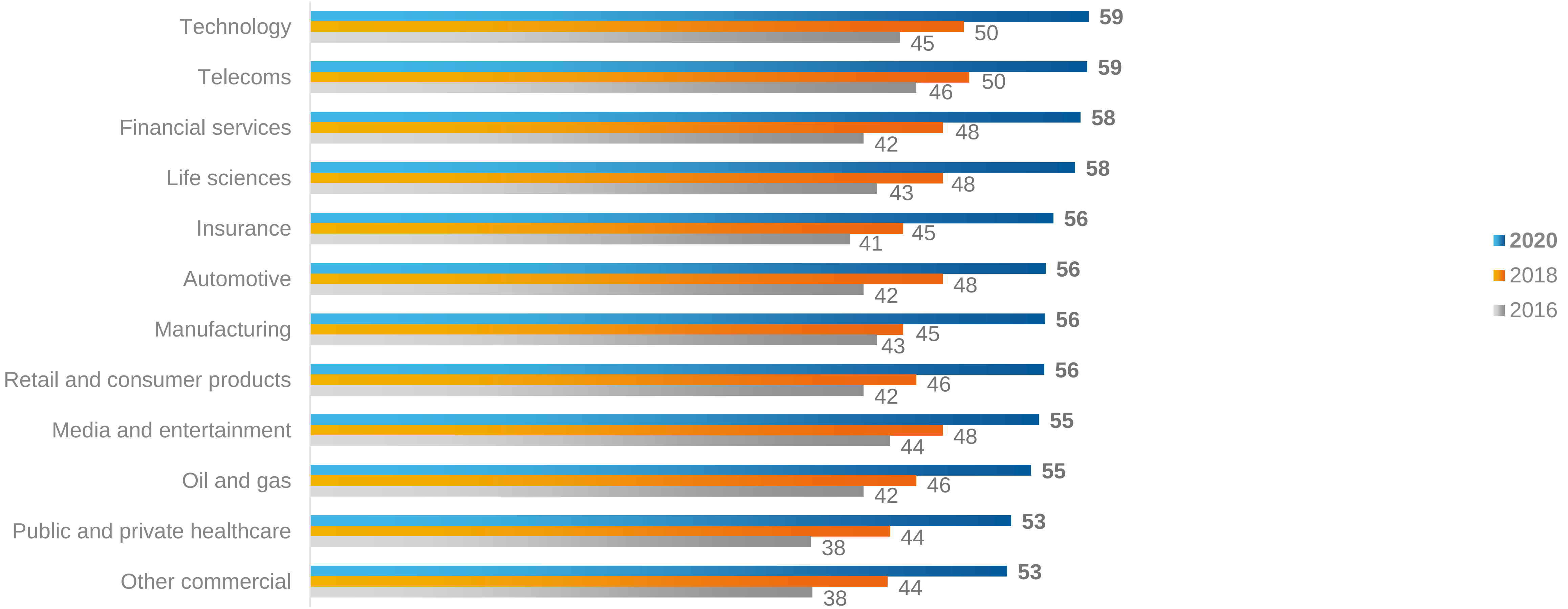
Color coded: **EUROPE**, **APJC**, **Americas**



Average benchmark group scores. Base: all respondents (4300)

Maturity by Industry: 2016 to 2018 Comparison

Average score out of 100



Average maturity score. Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000)

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Best and Worst Performers By Industry

	2020	2018	2016
MOST MATURE	Technology	Telecoms	Telecoms
	Telecoms	Technology	Technology
	Financial services	Financial services	Media and entertainment
LEAST MATURE	Media and entertainment	Insurance	Retail and consumer products
	Oil and gas	Manufacturing	Insurance
	Public and private healthcare	Public and private healthcare	Public and private healthcare

Based on average maturity scores. Base: all 2020 respondents (4300), all 2018 respondents (4600) and all 2016 respondents (4000)

Most and Least Mature by Industry per Region

	APJC	Europe	Americas
MOST MATURE	Technology	Telecoms	Technology
	Life sciences	Financial services	Financial services
	Telecoms	Life sciences	Insurance
LEAST MATURE	Public and private healthcare	Insurance	Automotive
	Media and entertainment	Public and private healthcare	Media and entertainment
	Retail and consumer products	Oil and gas/energy	Public and private healthcare

Based on average maturity scores. Base: all 2020 respondents (4300)

Best and Worst Performers by Country

2020	2018	2016	
India	India	India	MOST MATURE
Mexico	Brazil	Brazil	
Poland	Thailand (Surveyed in 2018 only)	Mexico	
Netherlands	France	UK	LEAST MATURE
Sweden	Denmark (Surveyed in 2018 only)	China	
Japan	Japan	Japan	

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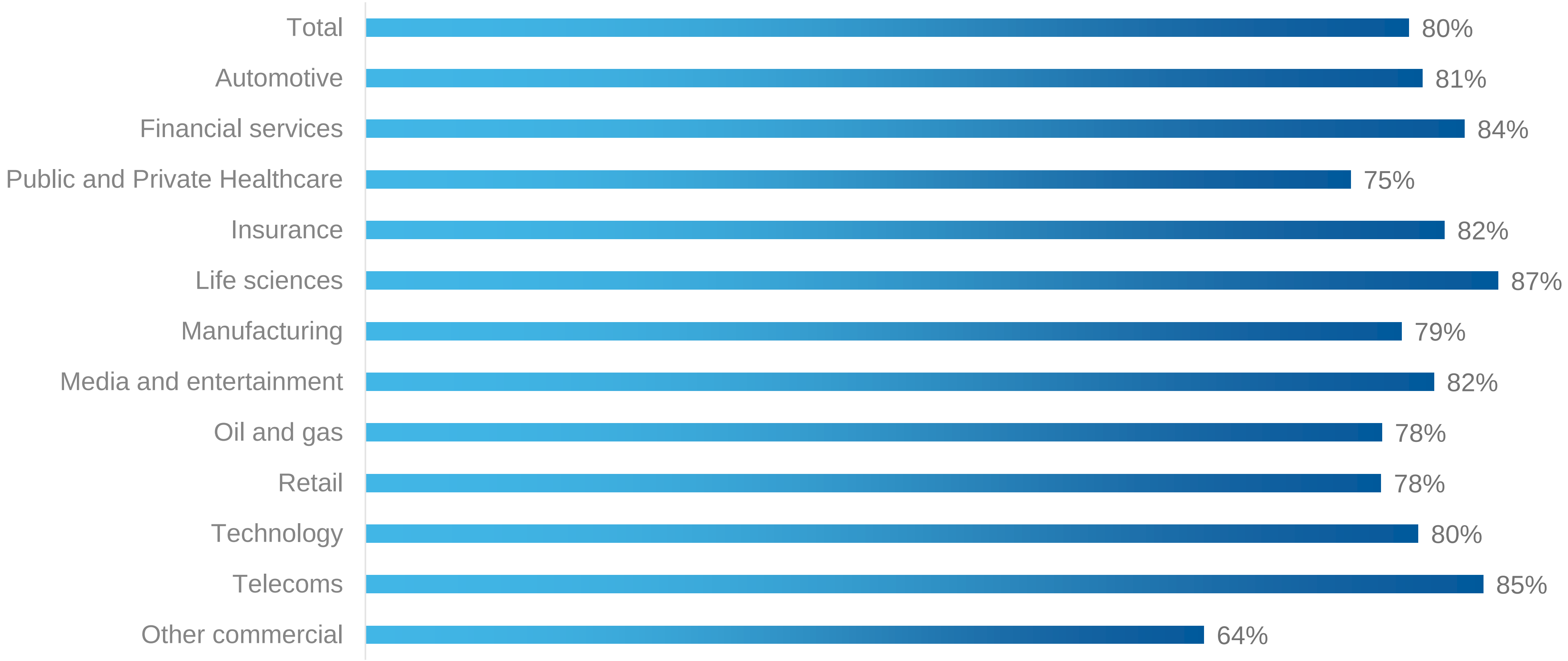
Digital Transformation Acceleration



“Have you successfully accelerated any of your digital transformation programs this year?” Base: all 2020 respondents (4300) Showing the proportion of respondents who selected “Yes, for all of our digital transformation programs”, “Yes, for most of our digital transformation programs” or “Yes, for some of our digital transformation programs”

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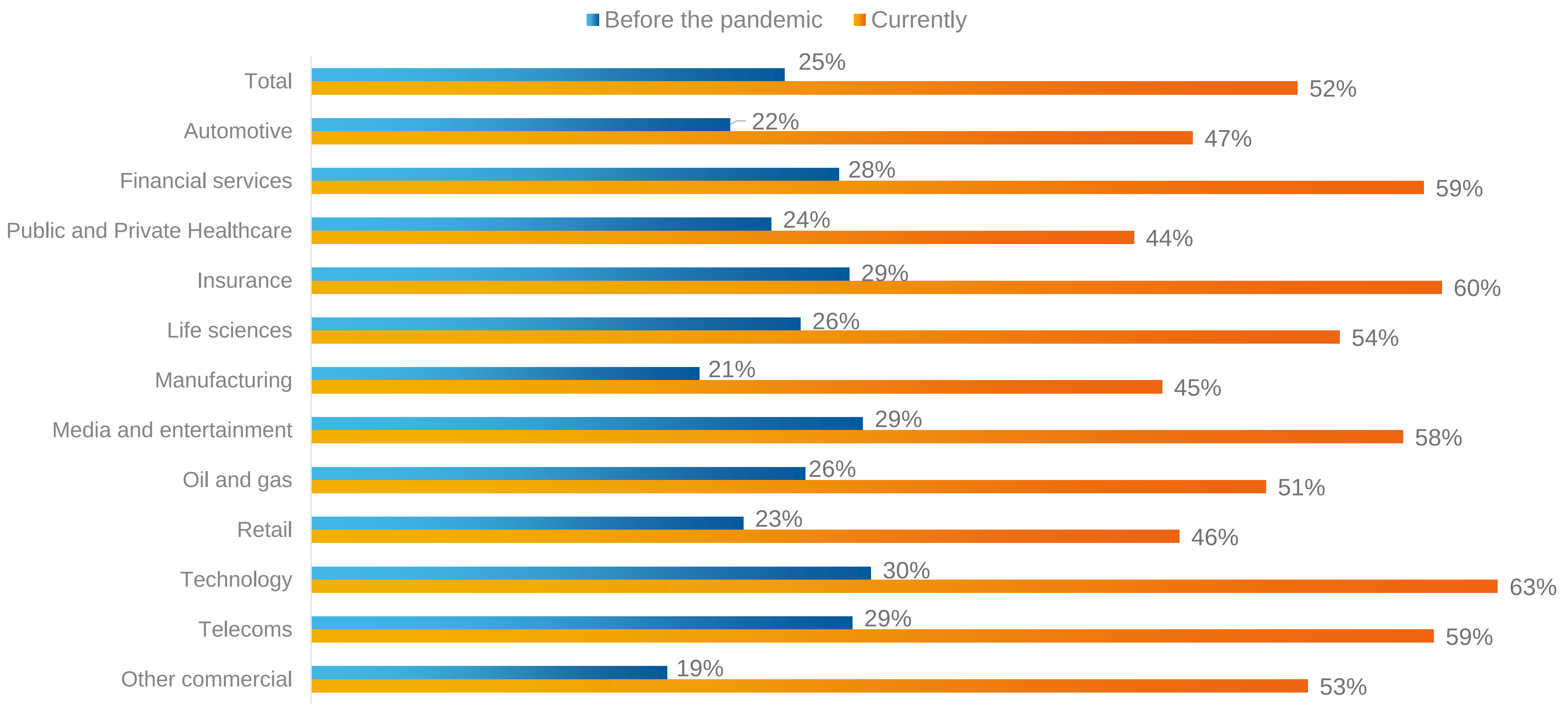
Proportion Of Staff Working Remotely



"What proportion of your organization's staff worked remotely before the pandemic/are currently working remotely?" Base: all 2020 respondents (4300)

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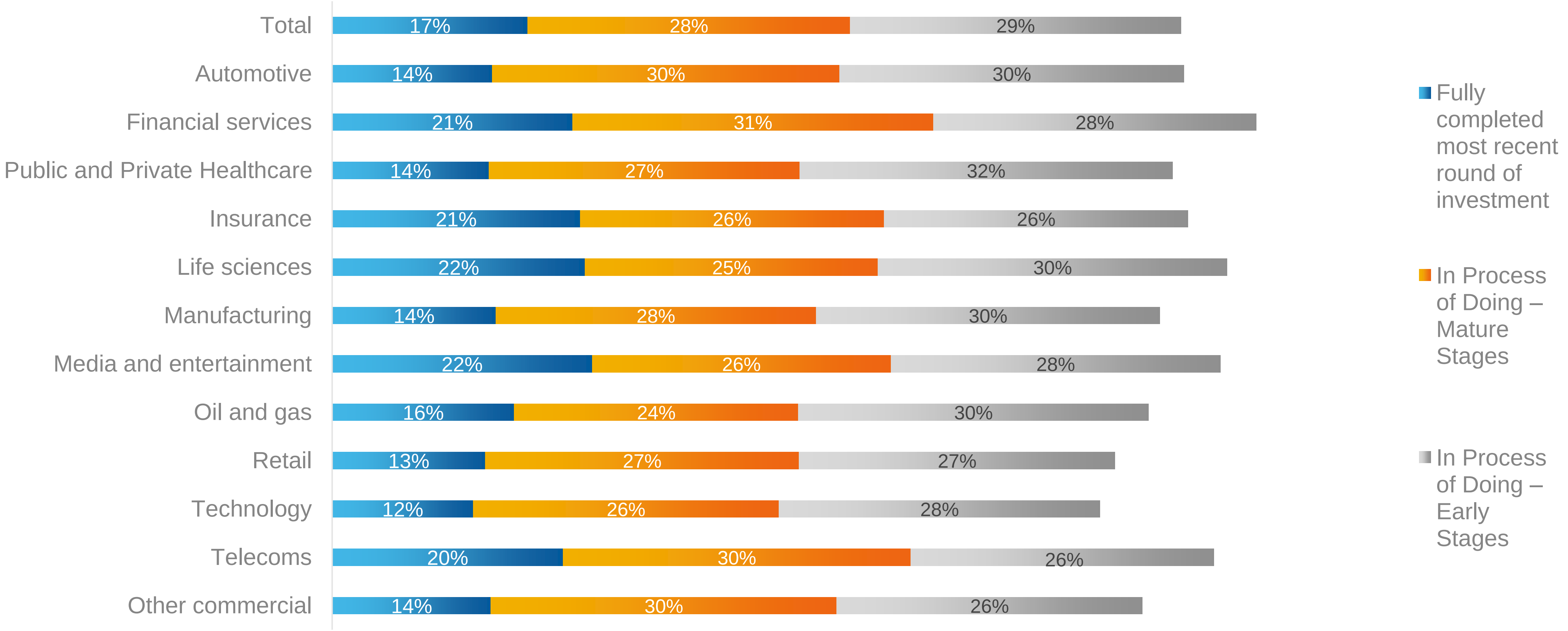
Made significant investment in on-demand digital services



"In terms of your organization's existing IT strategy, to what extent are you doing the following to support your digital business transformation?"
Answer: Made significant investments in on-demand digital services; Base: all 2020 respondents (4300). Not showing all answer options

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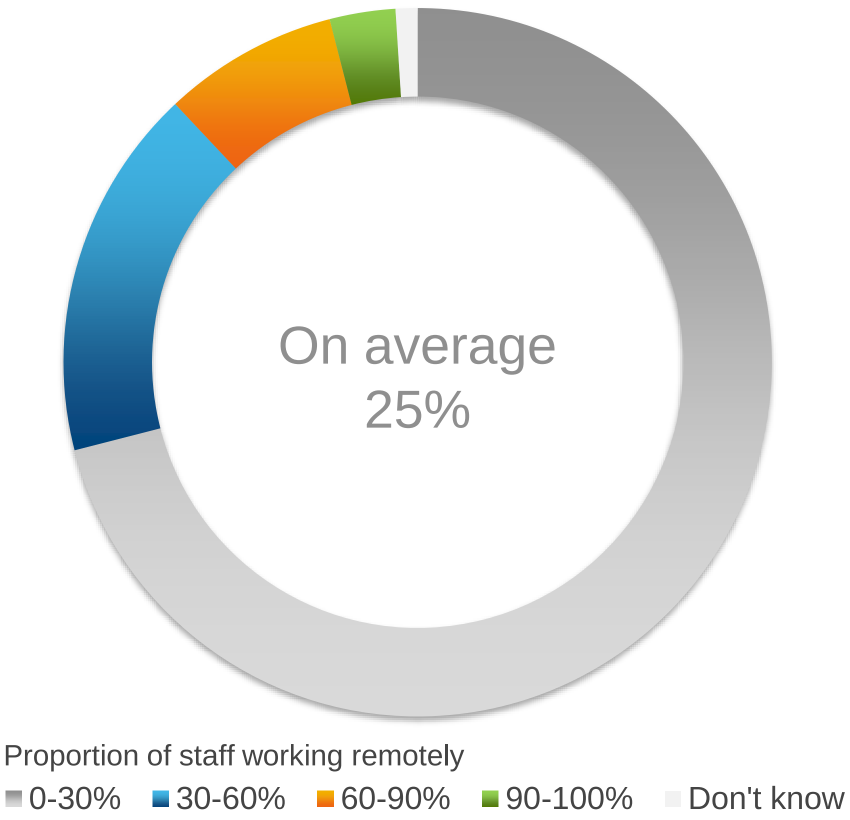
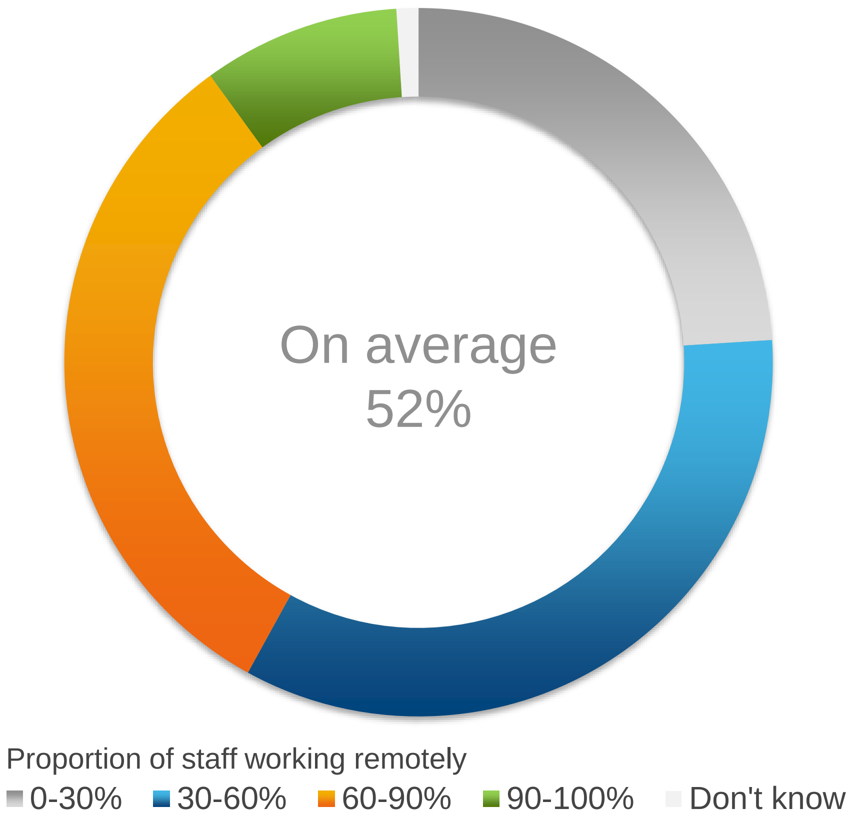
08 Digital Transformation and COVID-19

Proportion Of Staff Working Remotely

Before the pandemic

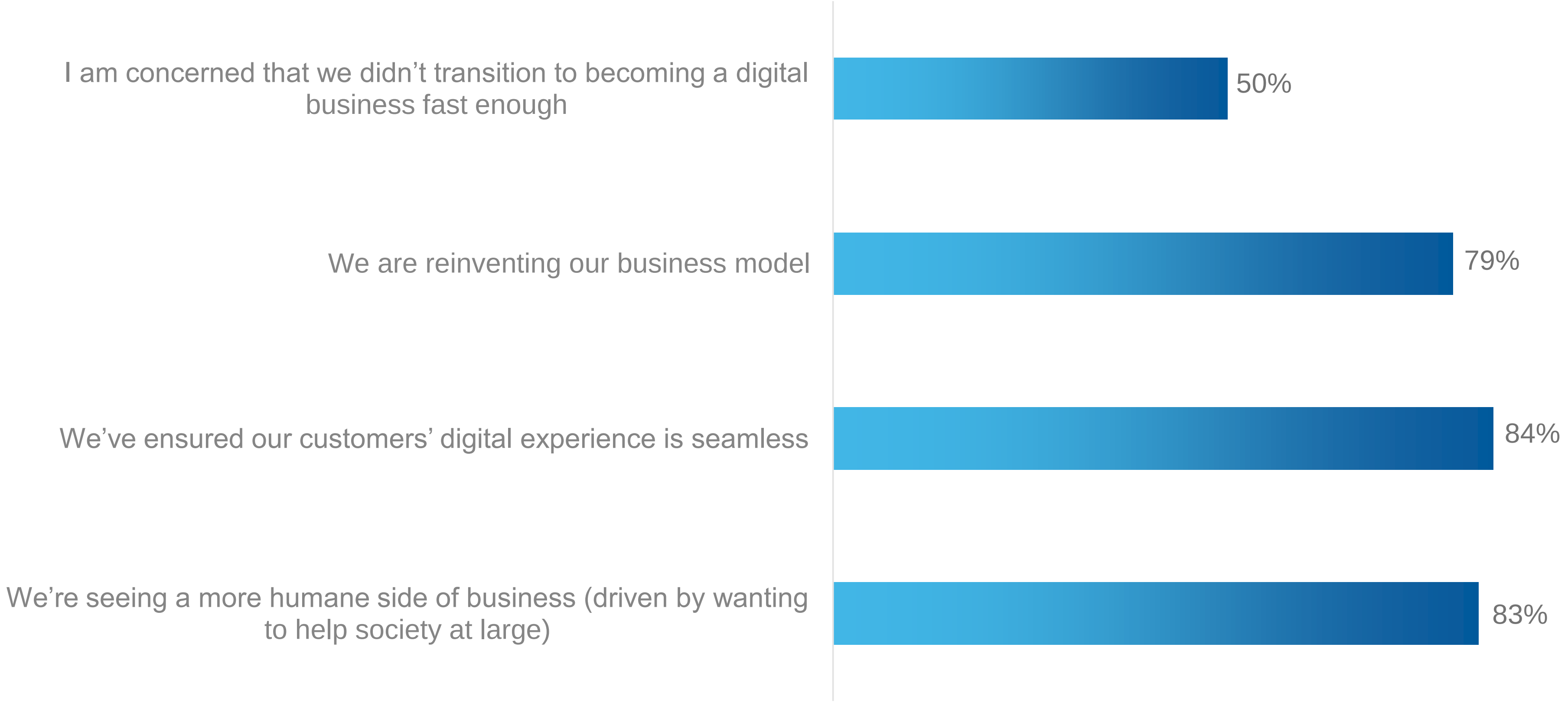


Today



"What proportion of your organization's staff worked remotely before the pandemic/are currently working remotely?" Base: all 2020 respondents (4300)

Responses To COVID-19



While most organizations have been able to maintain a seamless customer experience during COVID-19, many are reinventing their business model as a result of the unheaval.

"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"
Base: all 2020 respondents (4300). Showing the proportion of respondents who selected "Strongly agree" or "Somewhat agree"

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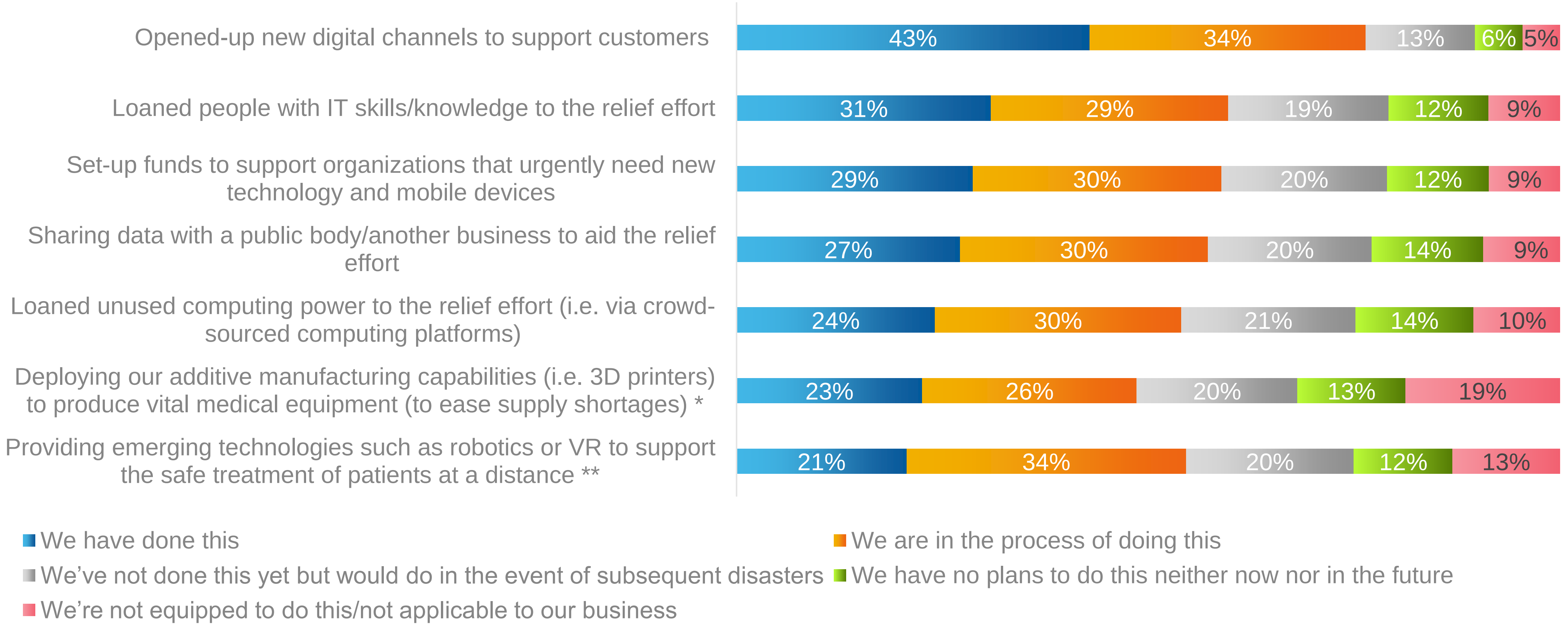
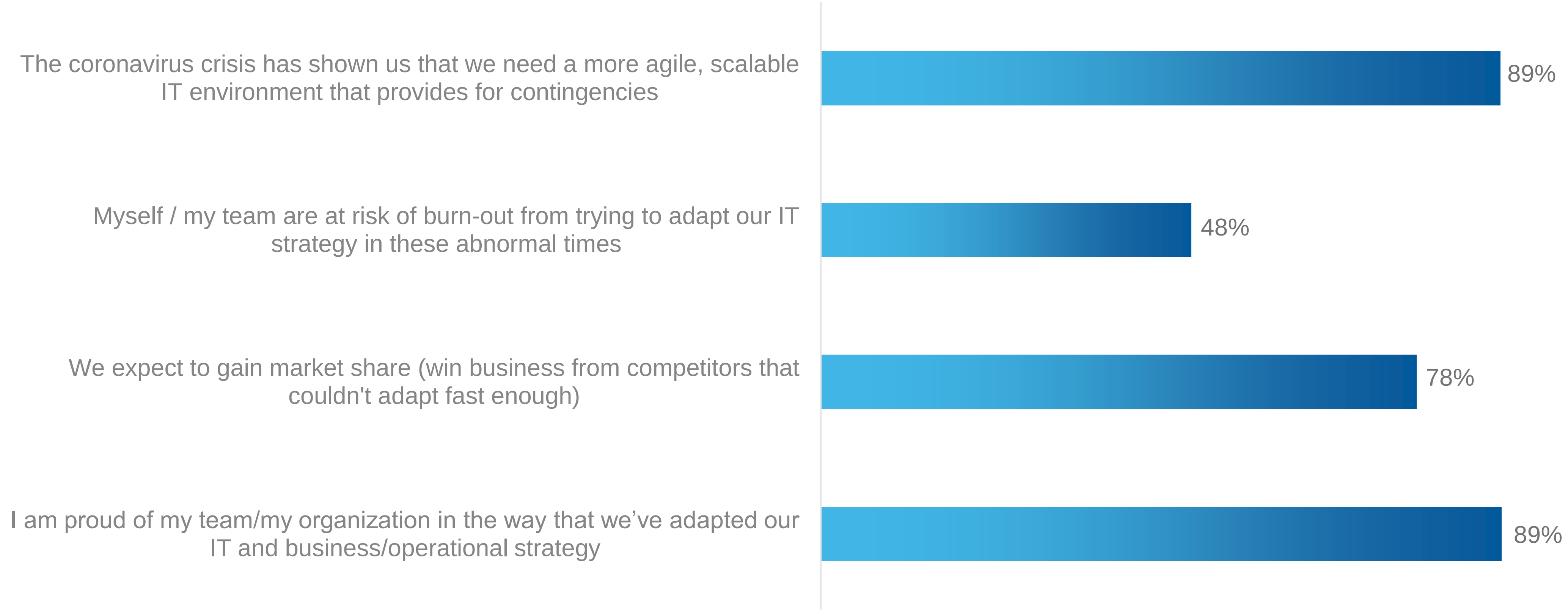
Actions Taken to Support Wider Coronavirus Effort



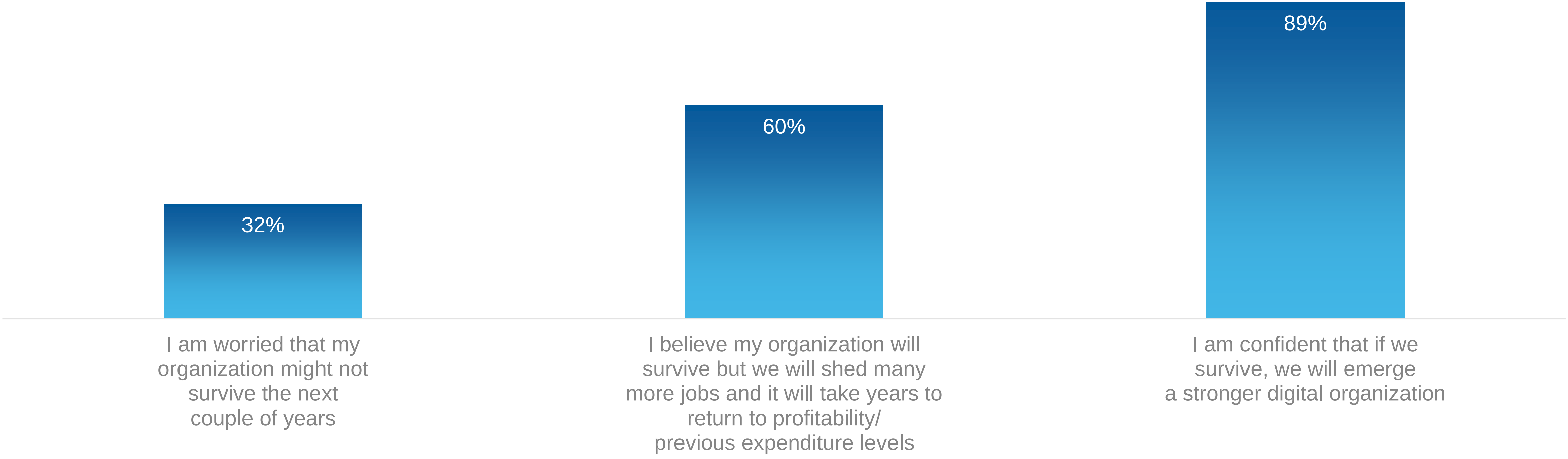
Which of the following has your organization done to support the wider coronavirus effort?" Base: all 2020 respondents (4300), except asterisked options:
* Indicates option was only shown to respondents from organizations in the manufacturing industry, or who work in the production and manufacturing, or supply chain or logistics departments
** Indicates option was only shown to respondents from organizations in the public and private healthcare industry

Responses to Unprecedented Upheaval



"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?" Base: all 2020 respondents (4300). Showing the proportion of respondents who selected "Strongly agree" or "Somewhat agree"

Survival Expectations



“As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?” Base: all 2020 respondents (4300).
Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”

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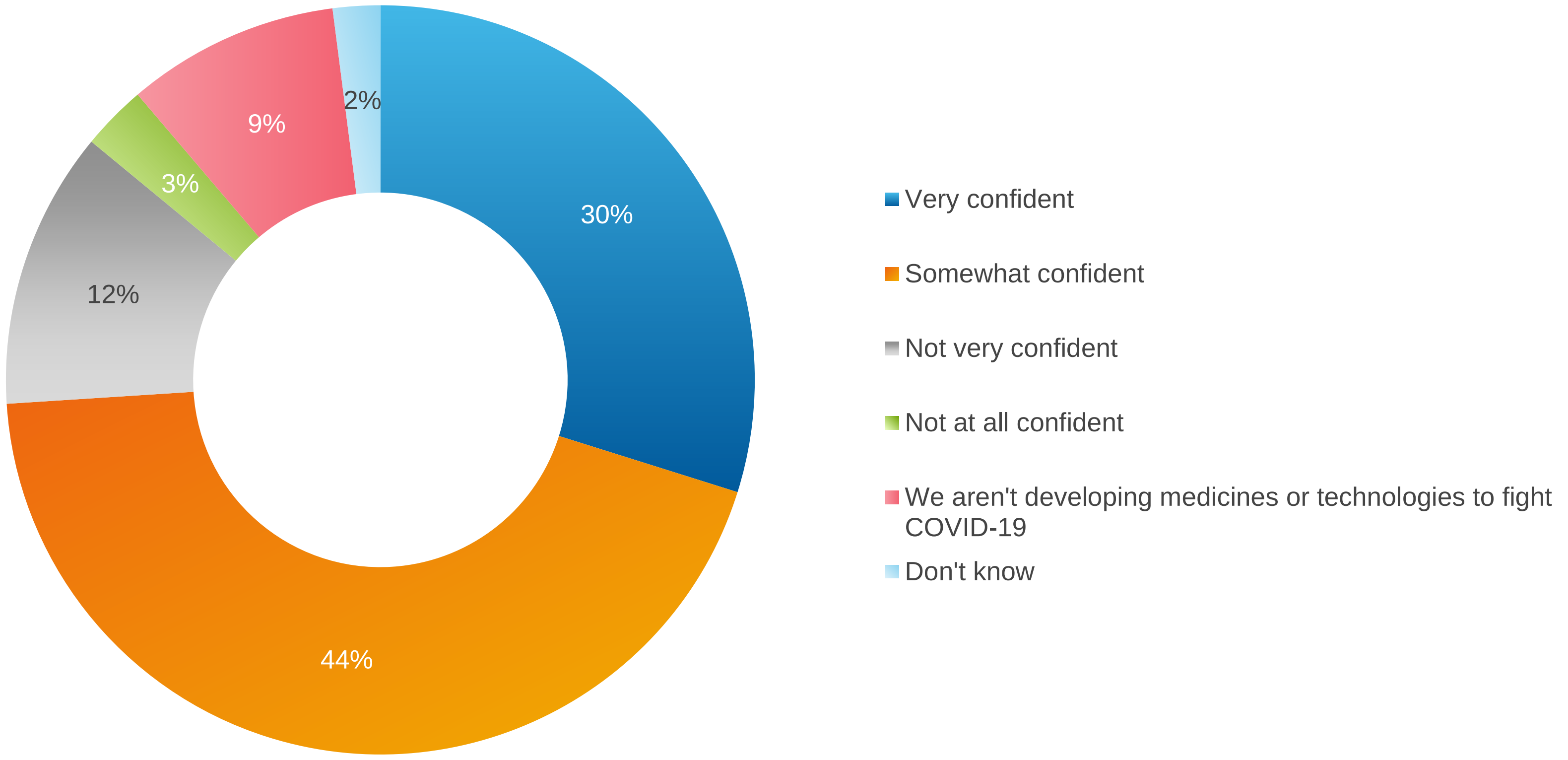
Confidence in Data and AI to Support The Healthcare Response



“How confident are you that your organization's data and AI are advanced enough to be able to support efforts to develop medicines/technologies to fight COVID-19?” Base: respondents from organizations in the public and private healthcare industries (392)

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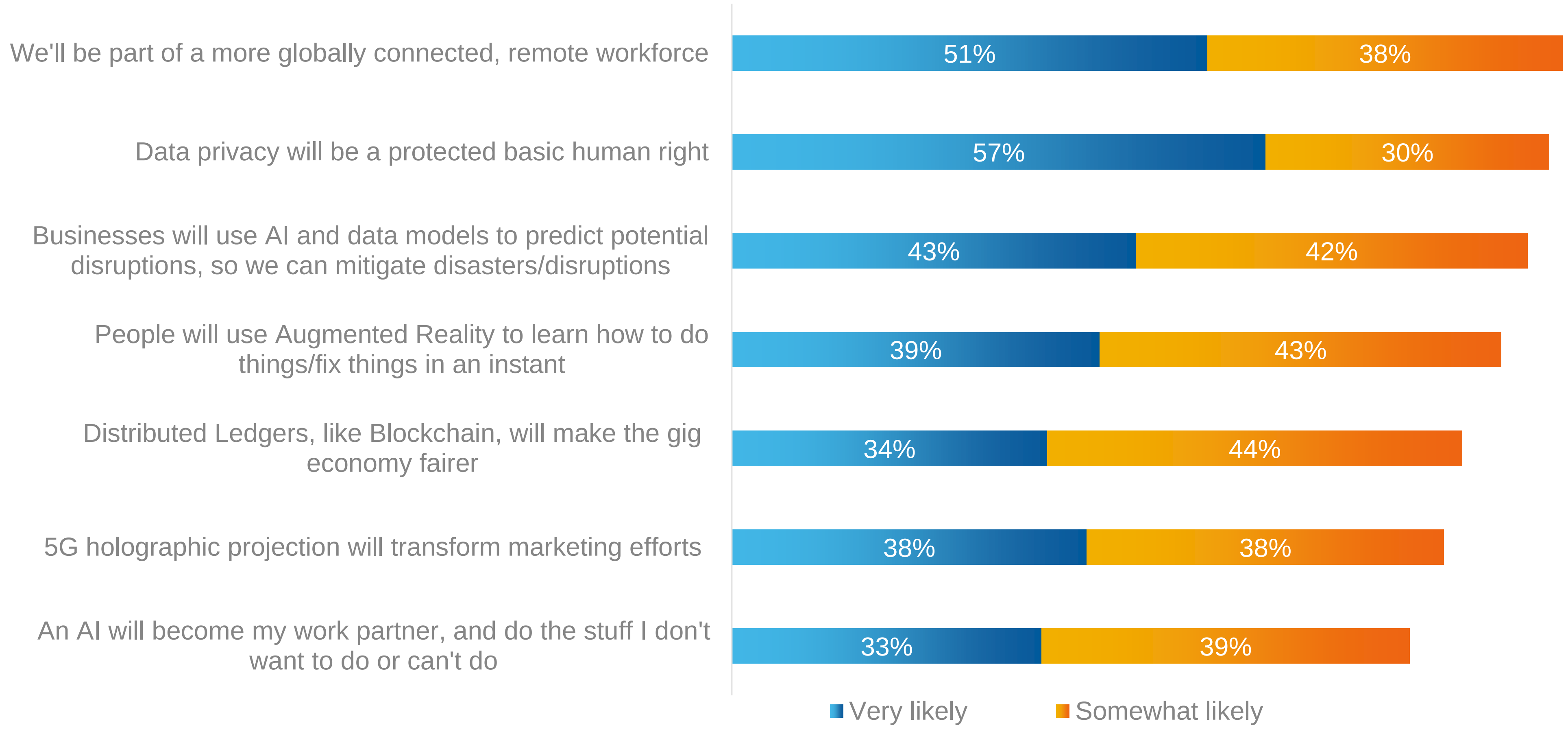
09 Expectations For The Future

How Emerging Technology will Impact our Lives in 3-5 Years



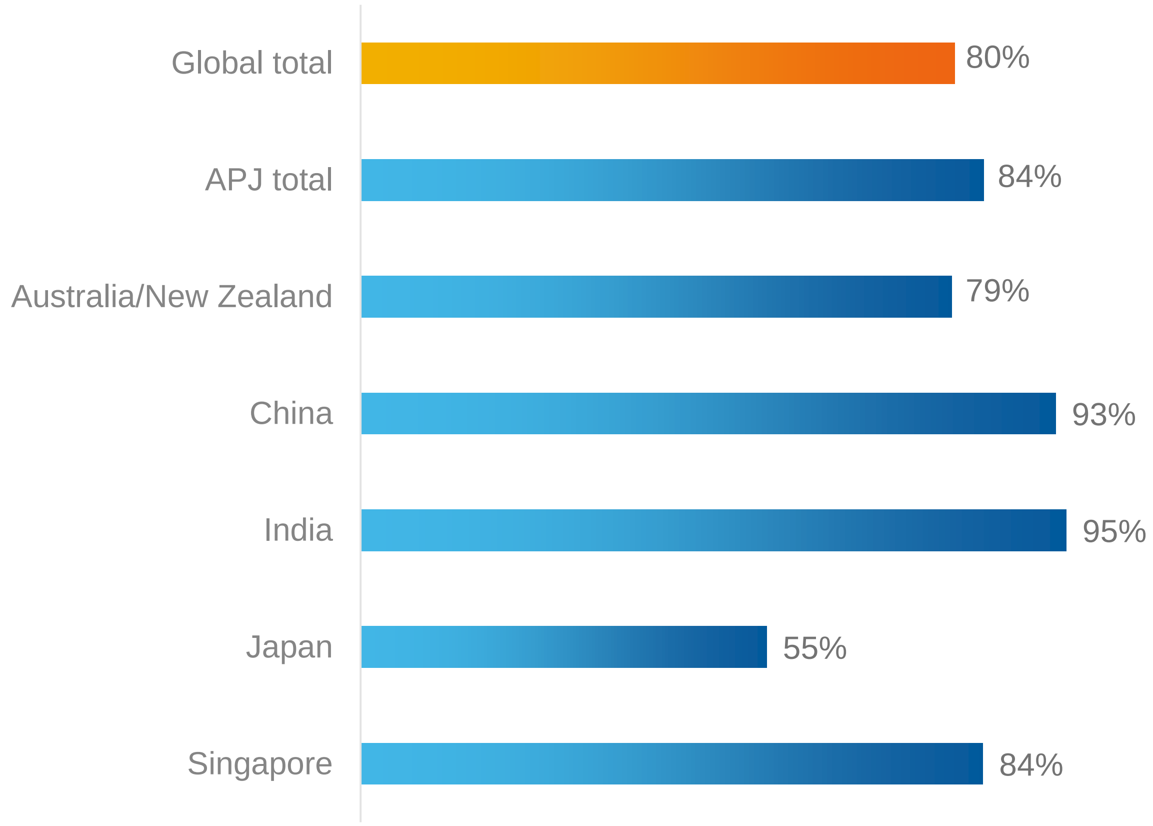
"How do you envision emerging technology impacting our lives/work/business 3-5 years from now?" Base: all 2020 respondents (4300)

Appendix

10 Regional Spotlights

APJC

Digital Transformation Acceleration



"Have you successfully accelerated any of your digital transformation programs this year?" Base: all 2020 respondents (4300) APJC (1400) Showing the proportion of respondents who selected "Yes, for all of our digital transformation programs", "Yes, for most of our digital transformation programs" or "Yes, for some of our digital transformation programs"

APJC

Top Three Digital Transformation Programs Accelerated

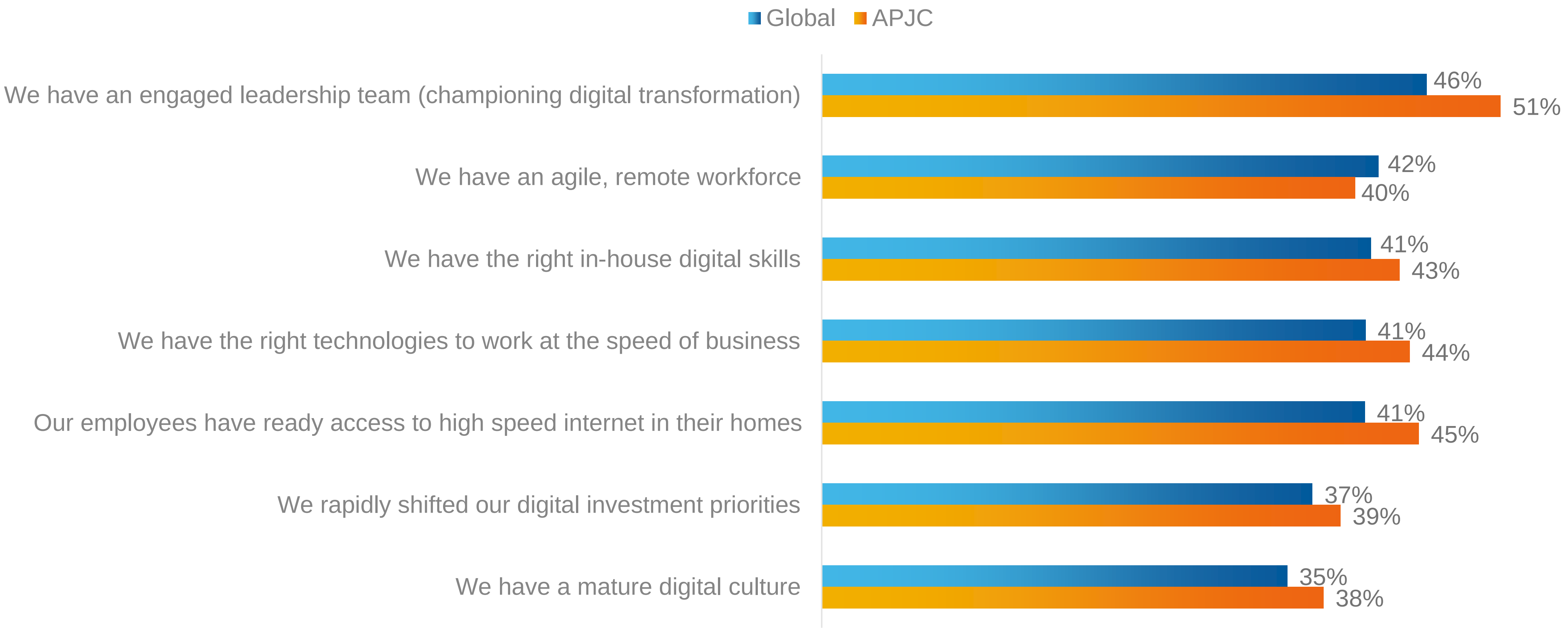
		Australia/ New Zealand	China	India	Japan	Singapore
1	Strengthening our cybersecurity defenses: 50% (2% more than the global average)	Strengthening our cybersecurity defenses: 50%	Strengthening our cybersecurity defenses: 52%	Strengthening our cybersecurity defenses: 52%	Rolling out broader remote working capabilities: 46%	Strengthening our cybersecurity defenses: 49%
2	Reinventing how we deliver digital experiences to customers and employees: 44% (6% more than the global average)	Rolling out broader remote working capabilities: 45%	Reinventing how we deliver digital experiences: 51%	Transforming our services and consumption models: 48%	Strengthening our cybersecurity defenses: 42%	Rolling out broader remote working capabilities: 42%
3	Rolling out broader remote working capabilities: 43% (1% less than the global average)	Using data in completely new ways: 43%	Transforming our Edge deployments: 49%	Using data in completely new ways/ extending our business domain: 48%	Reinventing how we deliver digital experiences: 32%	Transforming our services and consumption models: 40%

“Which digital transformation programs have you successfully accelerated this year?”
Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427) APJC (1171)

DELL Technologies

Acceleration Enablers

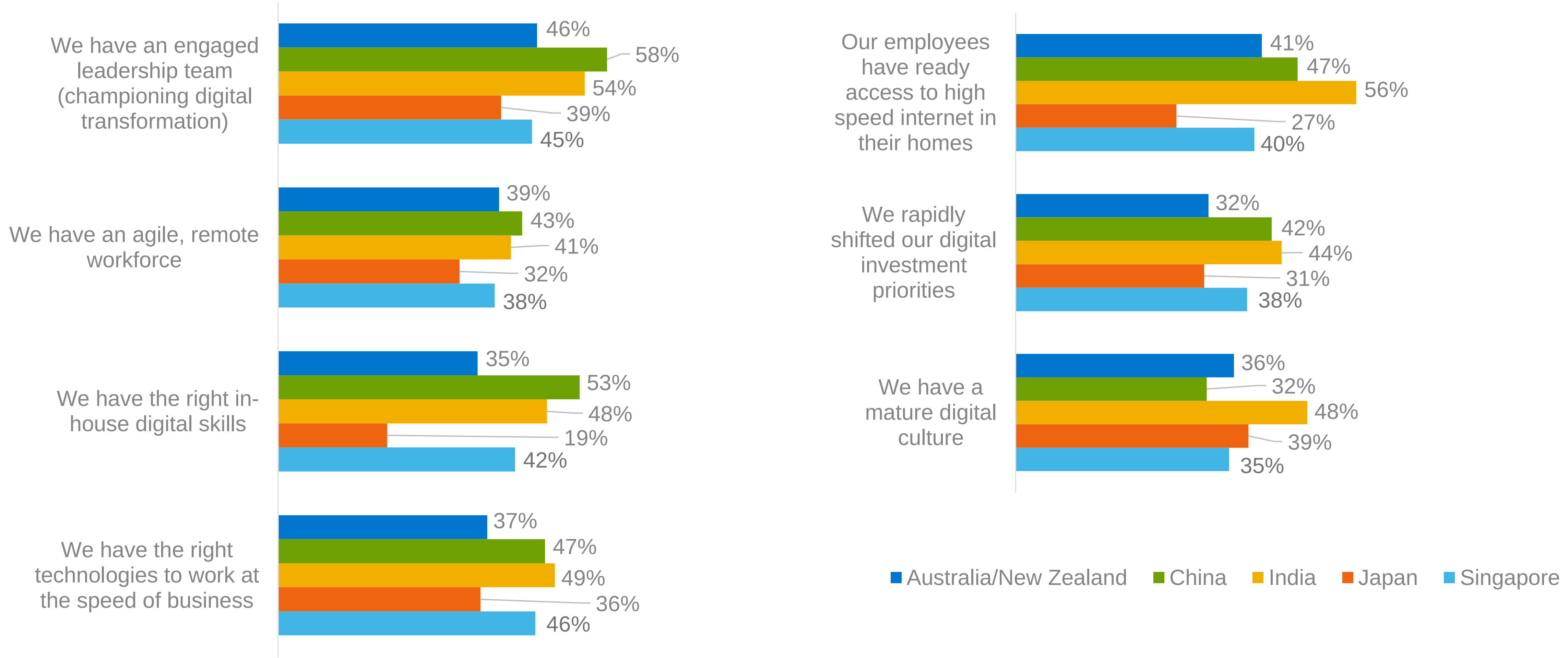
APJC



"What enabled you to successfully accelerate your transformation programs?"
Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), APJC (1171)

Acceleration Enablers

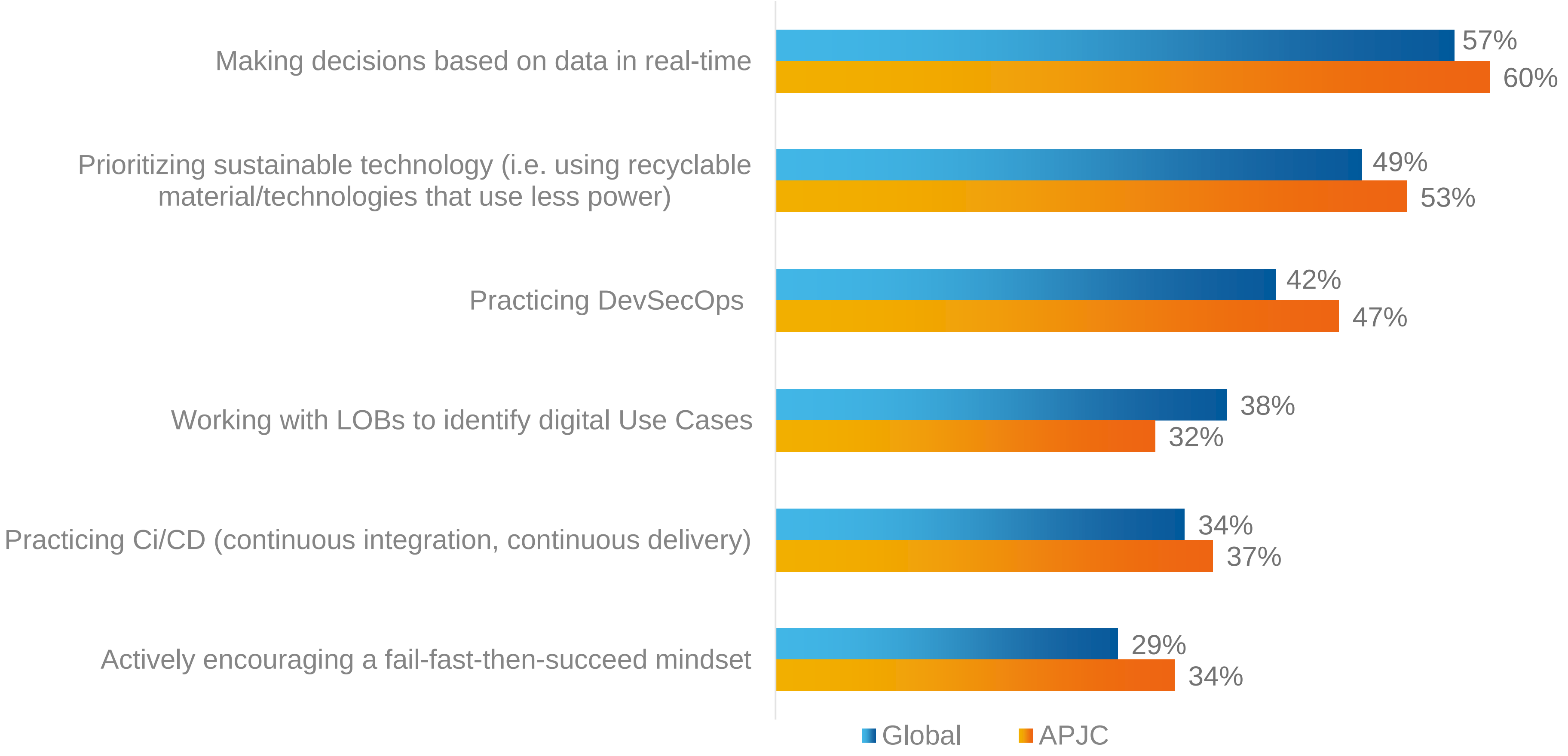
APJC



"What enabled you to successfully accelerate your transformation programs?"
Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), APJC (1171)

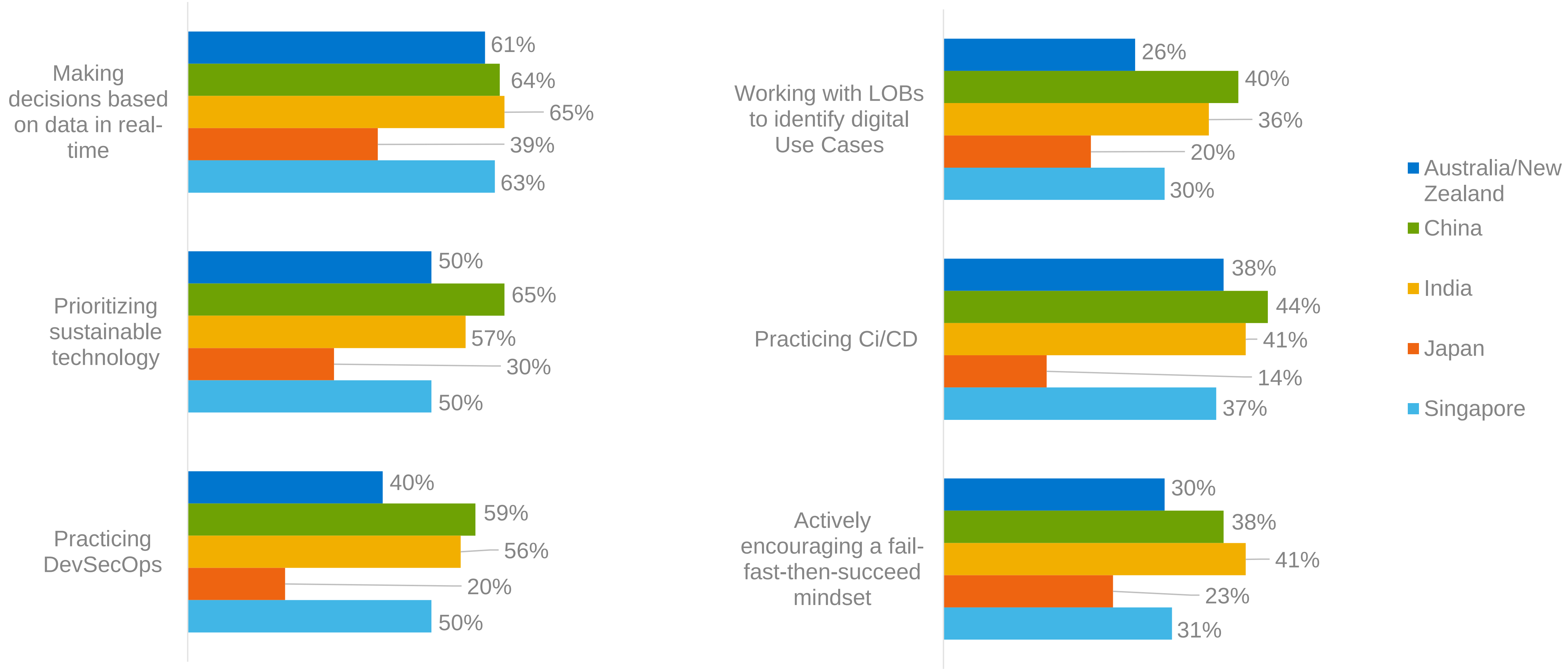
APJC

Digital Transformation Strategies



“Thinking about your digital transformation strategy, which of the following is your organization doing?”
Base: all 2020 respondents (4300) APJC (1400) Not showing “Don’t know” or “None of these”

Digital Transformation Strategies



"Thinking about your digital transformation strategy, which of the following is your organization doing?"
Base: all 2020 respondents (4300) APJC (1400) Not showing "Don't know" or "None of these"

APJC

Top Three Barriers To Digital Transformation

		Australia/ New Zealand	China	India	Japan	Singapore
1	Data privacy and security concerns: 37% (6% more than the global average)	Lack of budget and resources: 41%	Lack of the right in-house skill sets and expertise: 33%	Data privacy and security concerns: 47%	Lack of budget and resources: 33%	Data privacy and security concerns/ Lack of budget and resources: 42%
2	Lack of budget and resources: 32% (2% more than the global average)	Data privacy and security concerns: 36%	Data privacy and security concerns: 33%	Unable to extract valuable insights from data and/ or information overload: 38%	Lack the right in-house skill sets and expertise: 28%	-
3	Unable to extract valuable insights from data and/or information overload: 31% (2% more than the global average)	Lack of economic growth: 28%	Lack of the right technologies to work at the speed of business: 29%	Lack of economic growth: 36%	Data privacy and security concerns: 27%	Unable to extract valuable insights from data and/ or information overload: 38%

"What are the main barriers to digitally transforming your organization?"
Base: all 2020 respondents (4300) APJC (1400)

DELL Technologies

APJC

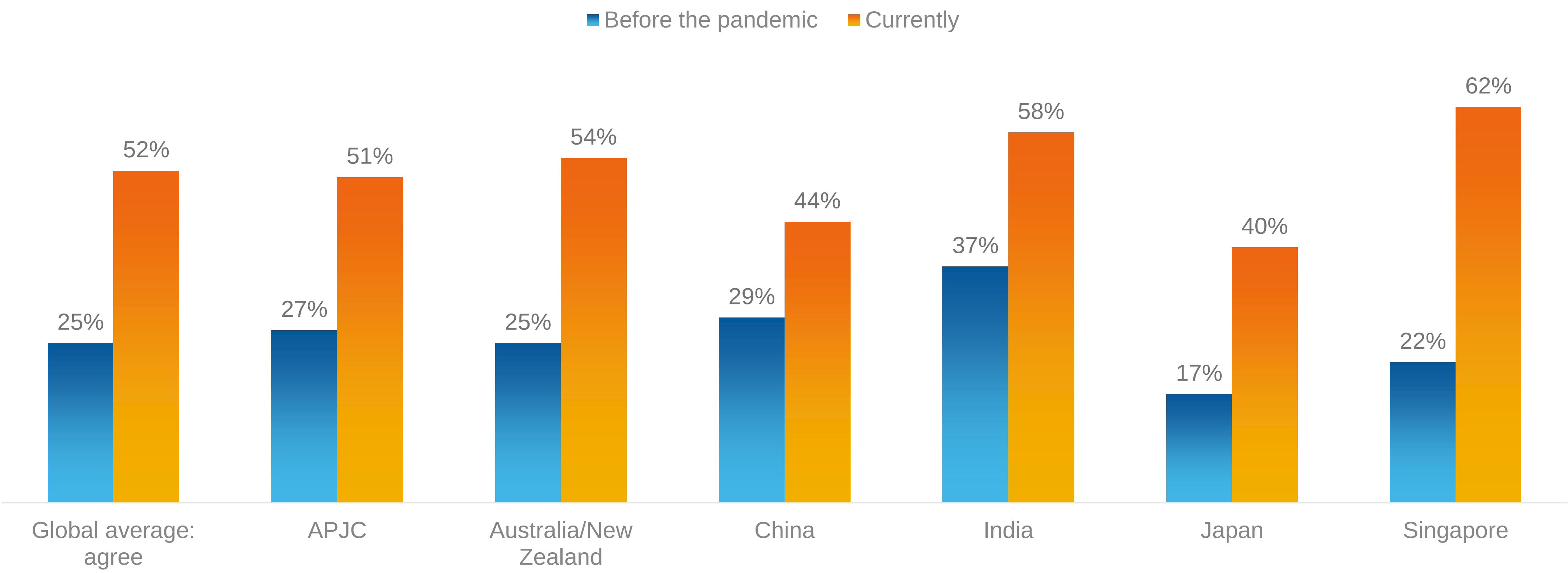
Top Three Tech Investments

		Australia/ New Zealand	China	India	Japan	Singapore
1	Cybersecurity solutions: 42% (1% less than the global average)	Data management tools: 43%	Cybersecurity solutions: 53%	Artificial intelligence algorithms: 50%	Artificial intelligence algorithms: 27%	Data management tools: 48%
2	Data management tools: 41% (2% more than the global average)	Cybersecurity solutions: 37%	Artificial intelligence algorithms: 50%	5G infrastructure: 45%	Commercial/ industrial robotics: 24%	Cybersecurity solutions: 47%
3	Artificial intelligence algorithms: 40% (8% more than the global average)	Privacy software: 35%	Data management tools: 48%	Software: containers and serverless: 44%	5G ready hardware: 21%	5G infrastructure/ Privacy software/ Artificial intelligence algorithms: 37%

"What new innovations or solutions is your organization investing in over the next 1-3 years to enable digital business?"
Base: all 2020 respondents (4300) APJC (1400)

APJC

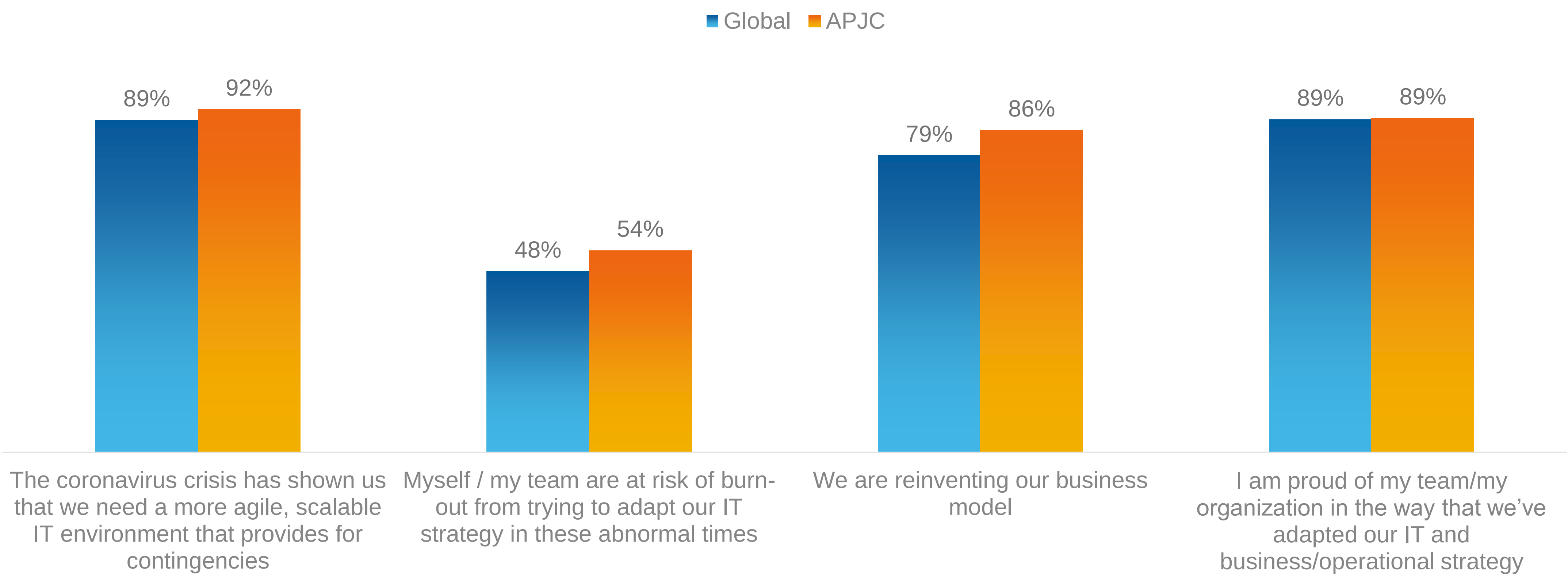
Proportion Of Staff Working Remotely



"What proportion of your organization's staff worked remotely before the pandemic/are currently working remotely?"
Base: all 2020 respondents (4300) APJC (1400)

APJC

Adapting to Unprecedented Upheaval

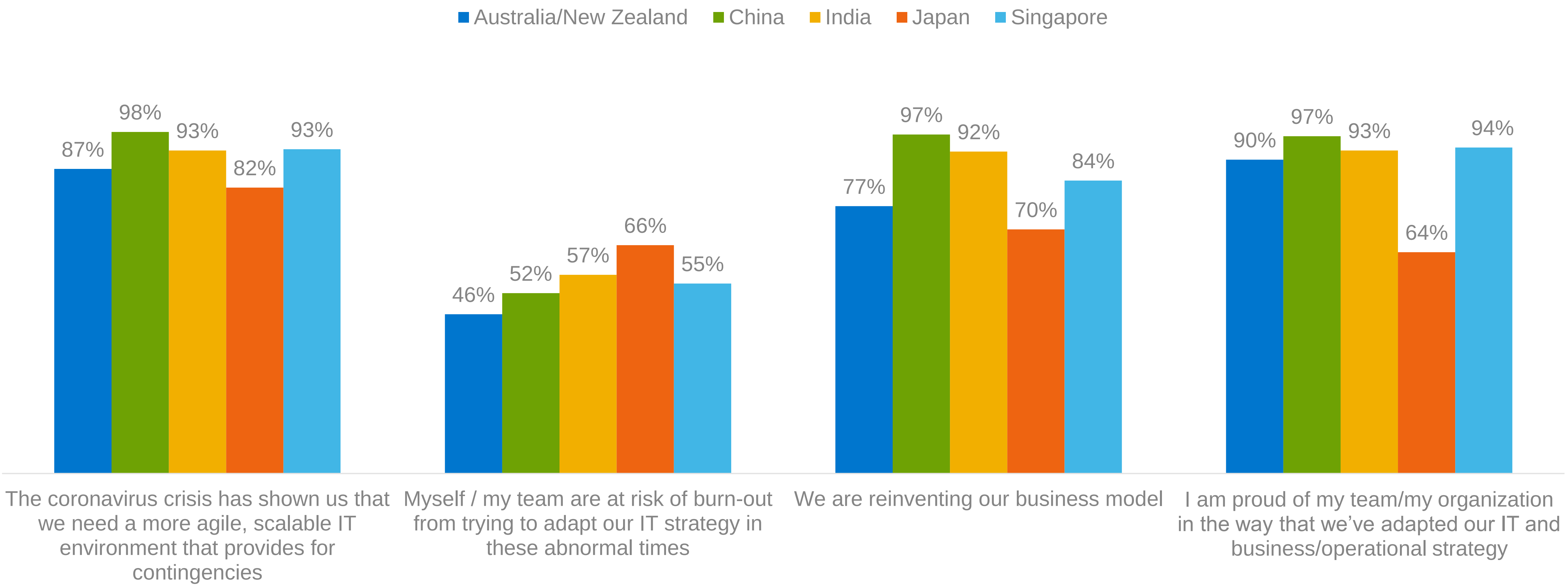


"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"
Base: all 2020 interim respondents (4300) APJC (1400). Showing the proportion of respondents who selected "Strongly agree" or "Somewhat agree"

DELL Technologies

APJC

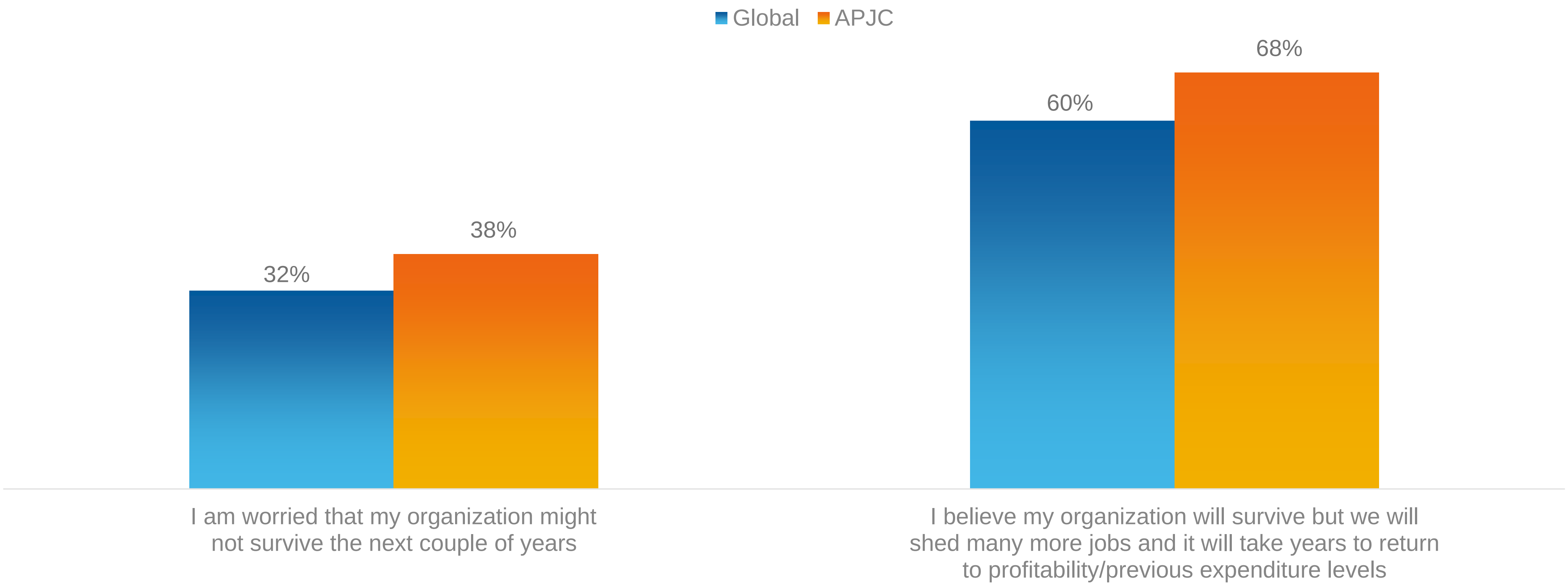
Adapting to Unprecedented Upheaval



"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"
Base: respondents from APJC (1400). Showing the proportion of respondents who selected "Strongly agree" or "Somewhat agree"

Survival Expectations

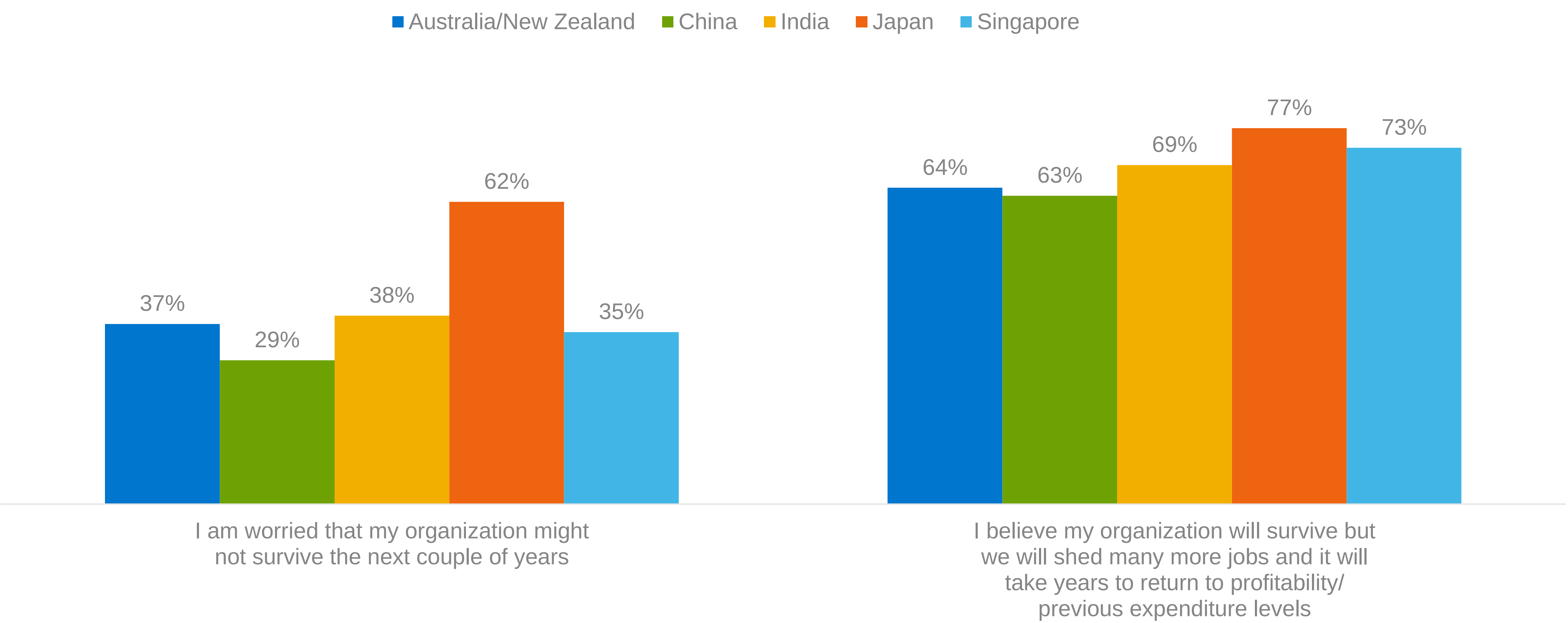
APJC



"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"
Base: all 2020 respondents (4300) APJC (1400). Showing the proportion of respondents who selected "Strongly agree" or "Somewhat agree"

APJC

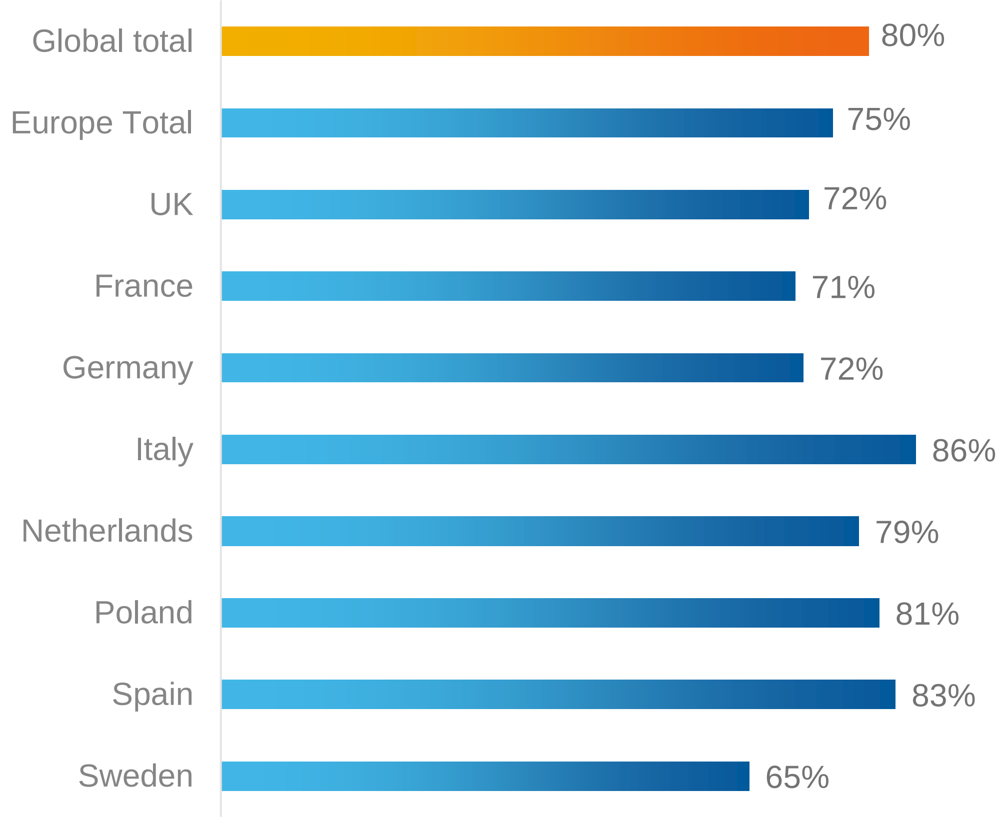
Survival Expectations



"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"
Base: respondents from APJC (1400). Showing the proportion of respondents who selected "Strongly agree" or "Somewhat agree"

EUROPE

Digital Transformation Acceleration



“Have you successfully accelerated any of your digital transformation programs this year?”
Base: all 2020 respondents (4300), Europe (1900). Showing the proportion of respondents who selected “Yes, for all of our digital transformation programs”, “Yes, for most of our digital transformation programs” or “Yes, for some of our digital transformation programs”

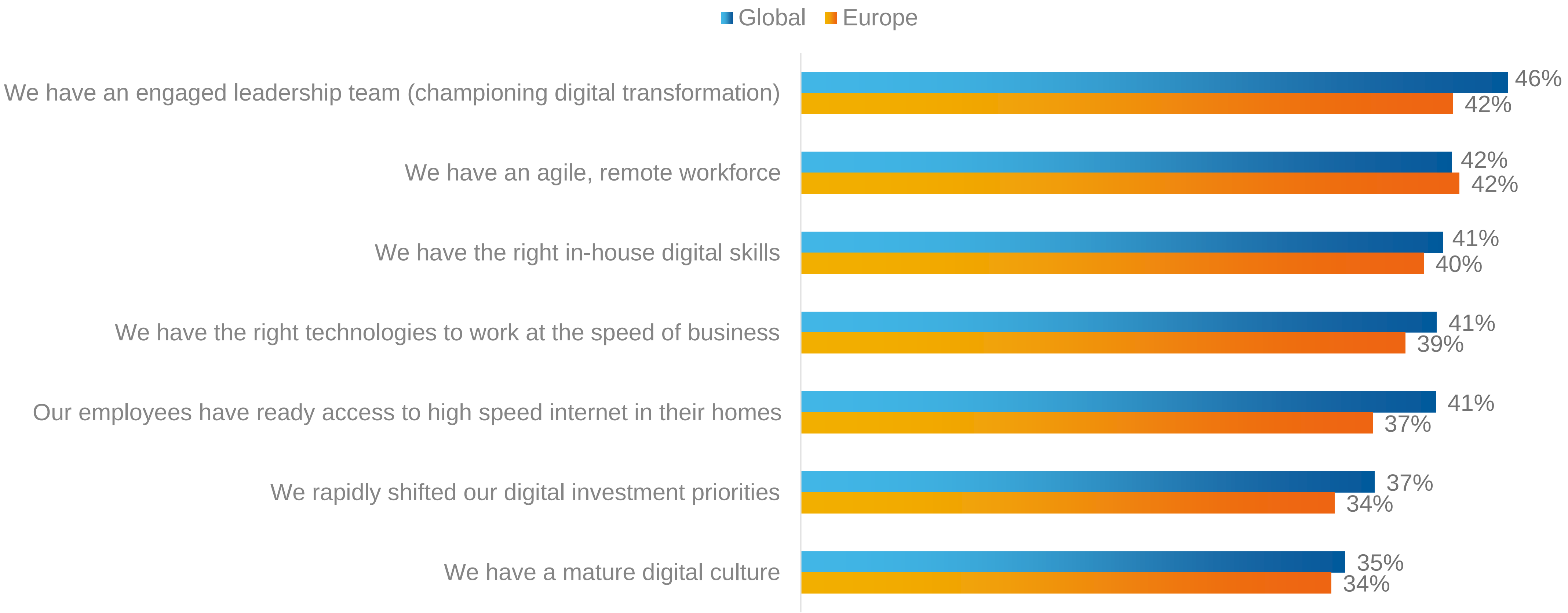
Top Three Digital Transformation Programs Accelerated

Europe

	Europe	UK	France	Germany	Italy	Netherlands	Poland	Spain	Sweden
1	Strengthening our cybersecurity defenses: 45% (3% less than the global average) Rolling out broader remote working capabilities: 45% (1% more than the global average)	Strengthening our cybersecurity defenses: 47%	Rolling out broader remote working capabilities: 44%	Strengthening our cybersecurity defenses: 46%	Rolling out broader remote working capabilities: 47%	Strengthening our cybersecurity defenses/ Rolling out broader remote working capabilities: 43%	Strengthening our cybersecurity defenses: 52%	Rolling out broader remote working capabilities: 48%	Lack of budget and resources: 28%
2	-	Rolling out broader remote working capabilities/ Using data in completely new ways: 46%	Strengthening our cybersecurity defenses: 42%	Rolling out broader remote working capabilities: 40%	Strengthening our cybersecurity defenses: 46%	-	Rolling out broader remote working capabilities: 47%	Strengthening our cybersecurity defenses: 45%	Extending our business domain: 41%
3	Using data in completely new ways: 34% (3% less than the global average)	-	Using data in completely new ways: 32%	Reinventing how we deliver digital experiences: 34%	Using data in completely new ways/ Transforming our Edge deployments 36%	Using data in completely new ways: 32%	Reinventing how we deliver digital experiences/ Transforming our Edge deployments 35%	Reinventing how we deliver digital experiences: 34%	Strengthening our cybersecurity defenses: 38%

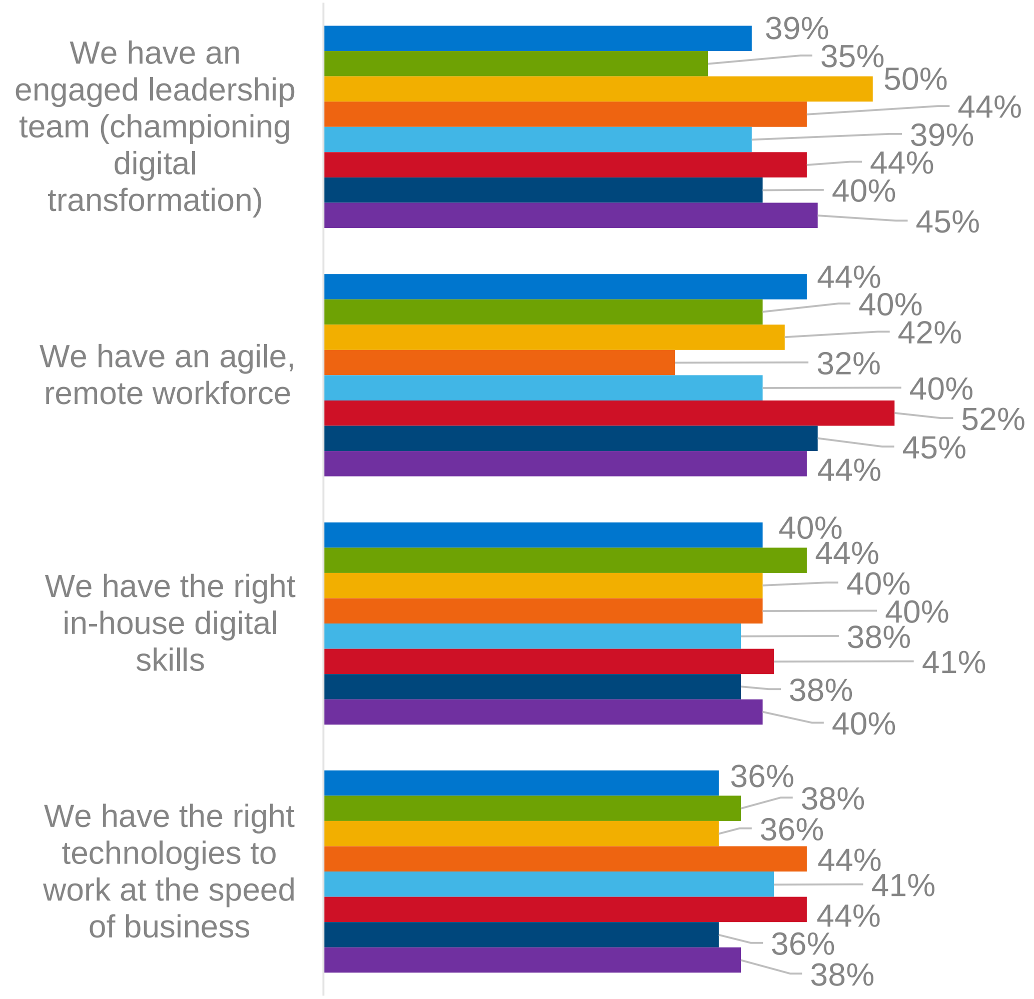
“Which digital transformation programs have you successfully accelerated this year?”
Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427) Europe (1430)

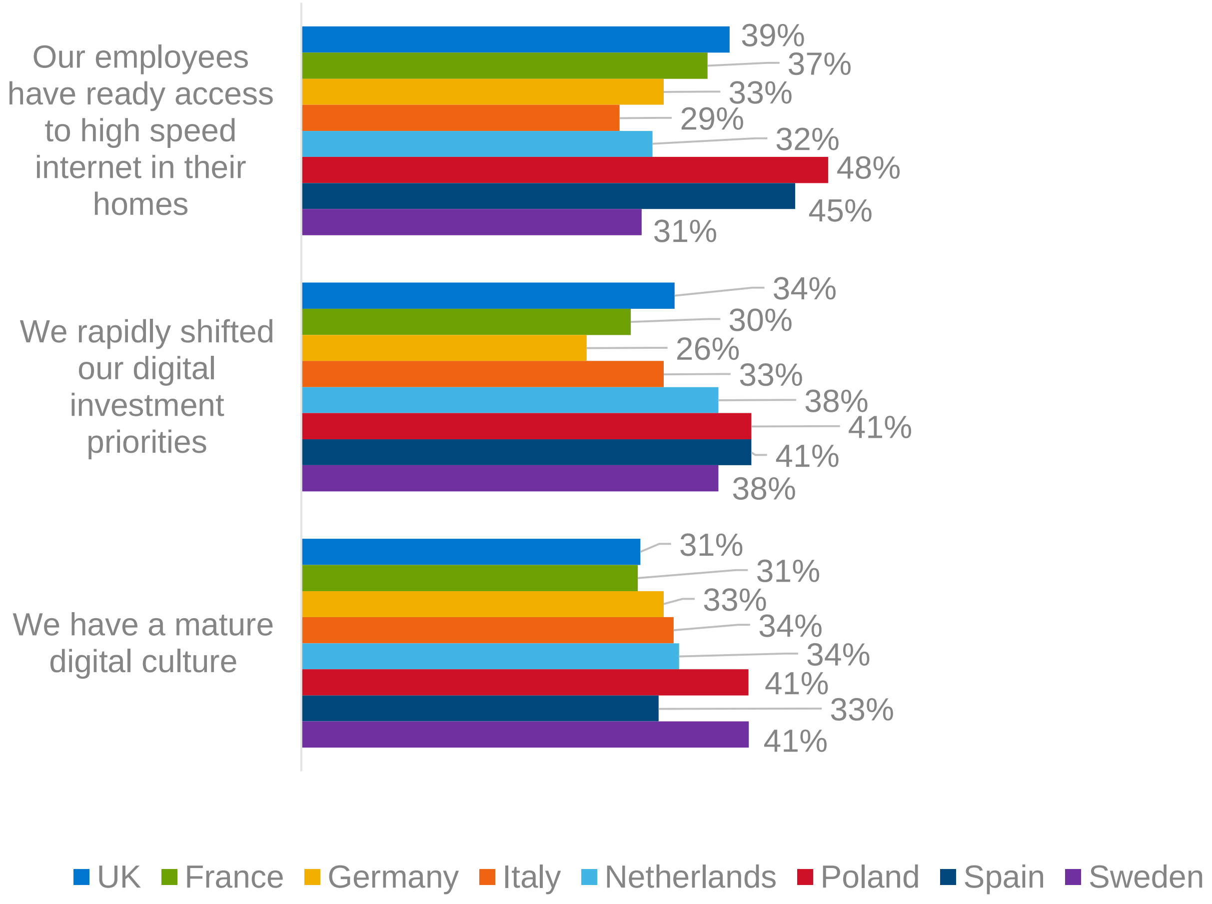
Acceleration Enablers



"What enabled you to successfully accelerate your transformation programs?"
Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), Europe (1430)

Acceleration Enablers

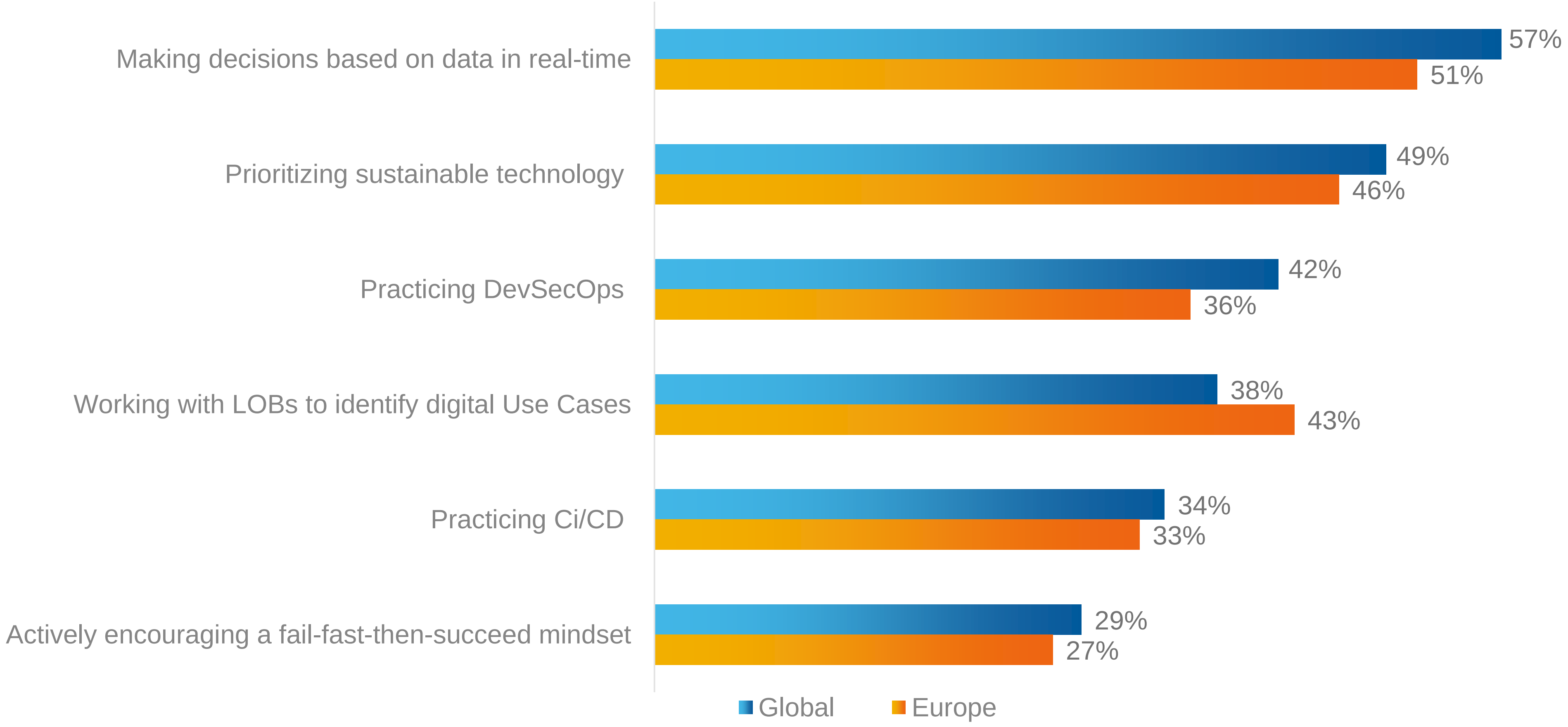




"What enabled you to successfully accelerate your transformation programs?"
Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), Europe (1430)

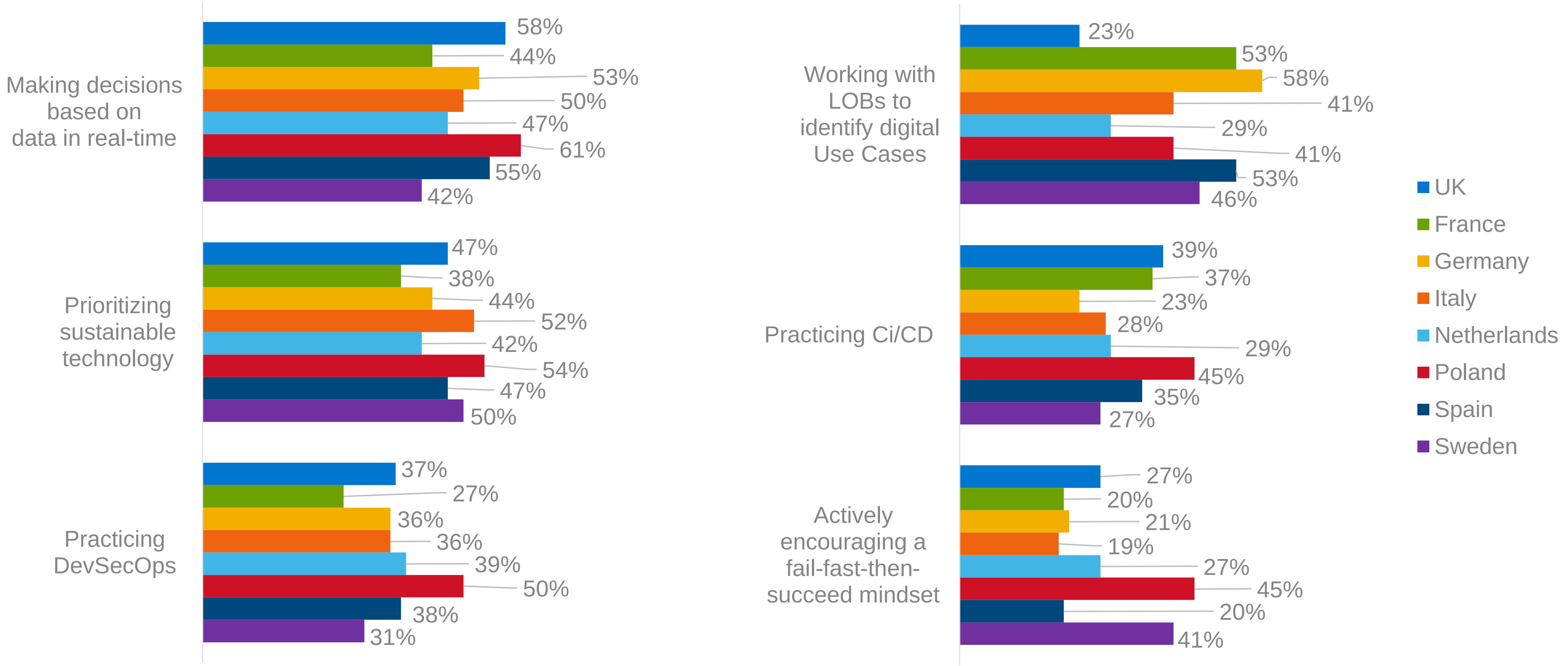
DELL Technologies

Digital Transformation Strategies



“Thinking about your digital transformation strategy, which of the following is your organization doing?”
Base: all 2020 respondents (4300) Europe (1900) Not showing “Don’t know” or “None of these”

Digital Transformation Strategies



"Thinking about your digital transformation strategy, which of the following is your organization doing?"
Base: all 2020 respondents (4300) Europe (1900) Not showing "Don't know" or "None of these"

Europe

Top Three Barriers To Digital Transformation

		UK	France	Germany	Italy	Netherlands	Poland	Spain	Sweden
1	Lack of budget and resources: 29% (1% less than the global average)	Lack of budget and resources: 37%	Lack of budget and resources: 30%	Unable to extract valuable insights from data and/or information overload: 34%	Data privacy and security concerns: 30%	Lack of economic growth: 30%	Regulation or legislative changes: 32%	Data privacy and security concerns: 39%	Lack of budget and resources: 28%
2	Unable to extract valuable insights from data and/or information overload: 28% (1% less than the global average)	Data privacy and security concerns: 28%	Unable to extract valuable insights from data and/or information overload: 28%	Data privacy and security concerns: 31%	Regulation or legislative changes: 24%	Lack of budget and resources: 29%	Unable to extract valuable insights from data and/or information overload: 31%	Lack of economic growth: 32%	Unable to extract valuable insights from data and/or information overload: 26%
3	Data privacy and security concerns: 27% (4% less than the global average)	Unable to extract valuable insights from data and/or information overload: 27%	Regulation or legislative changes: 26%	Lack of budget and resources: 28%	Lack the right technologies to work at the speed of business: 23%	Unable to extract valuable insights from data and/or information overload: 27%	Lack of budget and resources: 29%	Unable to extract valuable insights from data and/or information overload: 27%	Data privacy and security concerns/ Lack of economic growth: 26%

"What are the main barriers to achieving digital transformation within your organization?"
Base: all 2020 respondents (4300) Europe (1900)

Europe

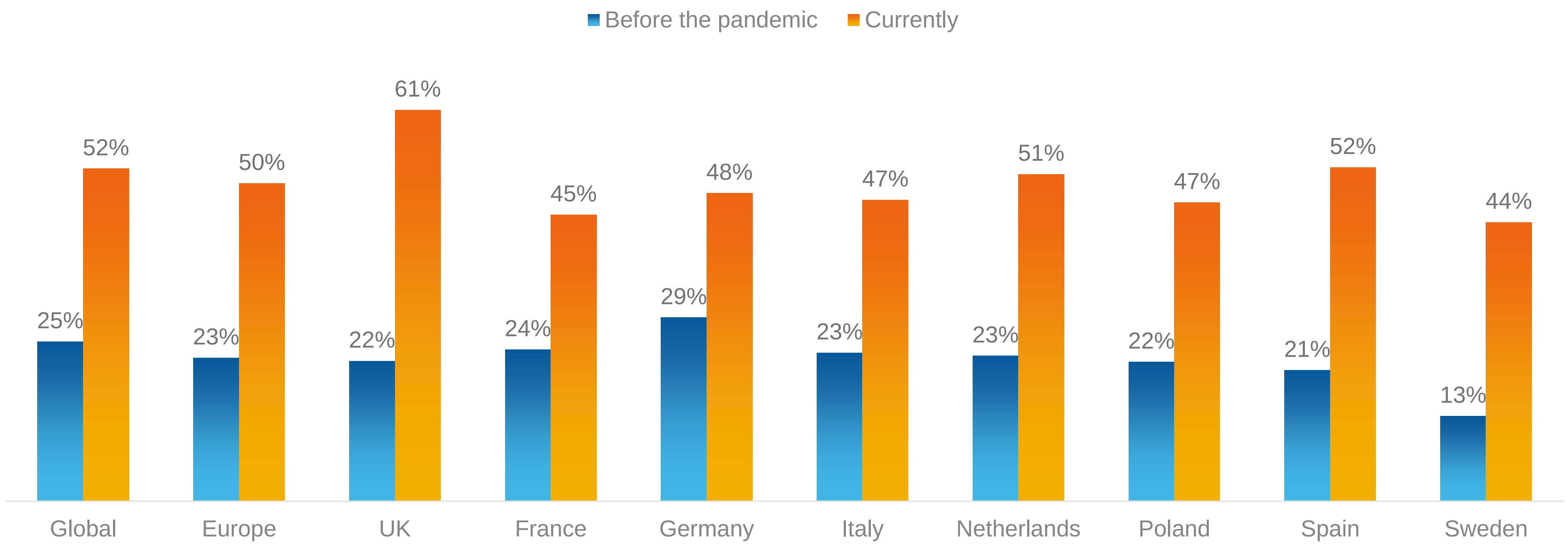
Top Three Tech Investments

		UK	France	Germany	Italy	Netherlands	Poland	Spain	Sweden
1	Cybersecurity solutions: 42% (1% less than the global average)	Cybersecurity solutions: 50%	Cybersecurity solutions: 38%	Cybersecurity solutions: 39%	5G infrastructure: 45%	Cybersecurity solutions: 41%	5G infrastructure: 50%	Cybersecurity solutions/5G infrastructure/ Privacy software: 46%	5G infrastructure: 45%
2	5G infrastructure: 36% (1% less than the global average)	Data management tools: 48%	5G ready hardware: 31%	Privacy software: 38%	Cybersecurity solutions: 45%	5G infrastructure: 39%	5G ready hardware: 44%	-	5G ready hardware: 37%
3	Data management tools: 35% (4% more than the global average)	Multi-cloud environment: 39%	5G ready hardware: 31%	Multi-cloud environment: 34%	5G ready hardware: 10%	5G ready hardware: 38%	Cybersecurity solutions: 41%	-	Cybersecurity solutions/ Data management tools: 35%

"What new innovations or solutions is your organization investing in over the next 1-3 years to enable digital business?"
Base: all 2020 respondents (4300) Europe (1900)

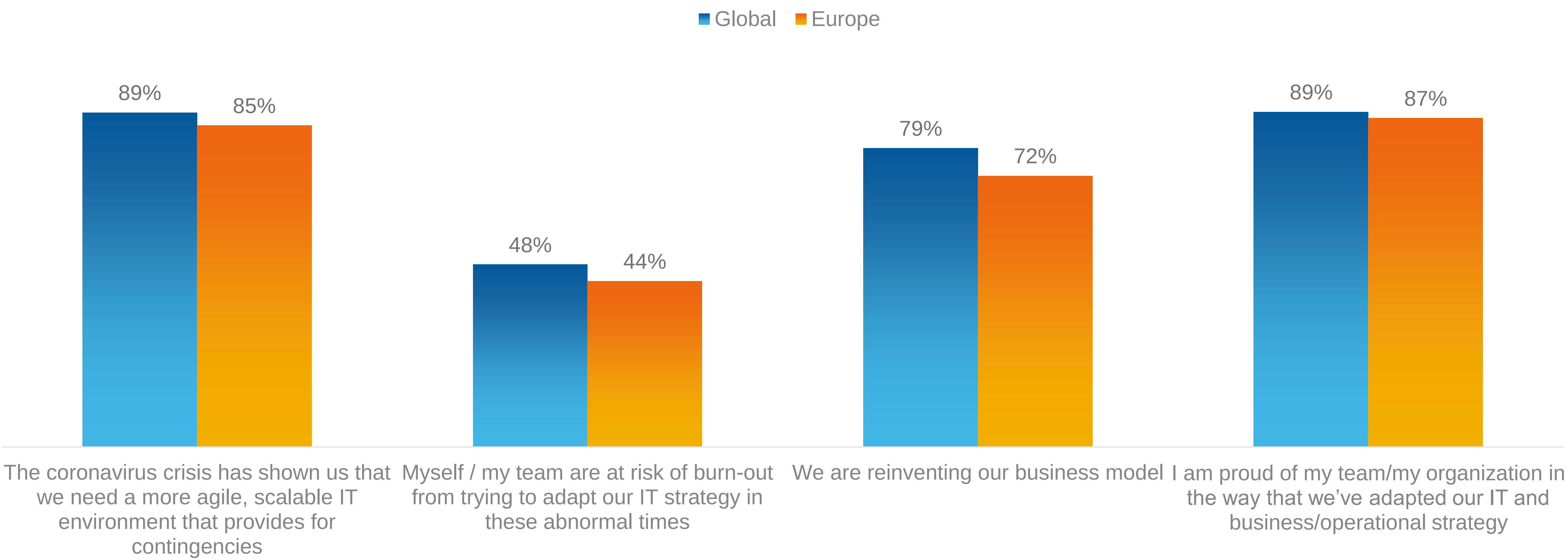
DELL Technologies

Proportion Of Staff Working Remotely



"What proportion of your organization's staff worked remotely before the pandemic/are currently working remotely?"
Base: all 2020 respondents (4300) Europe (1900)

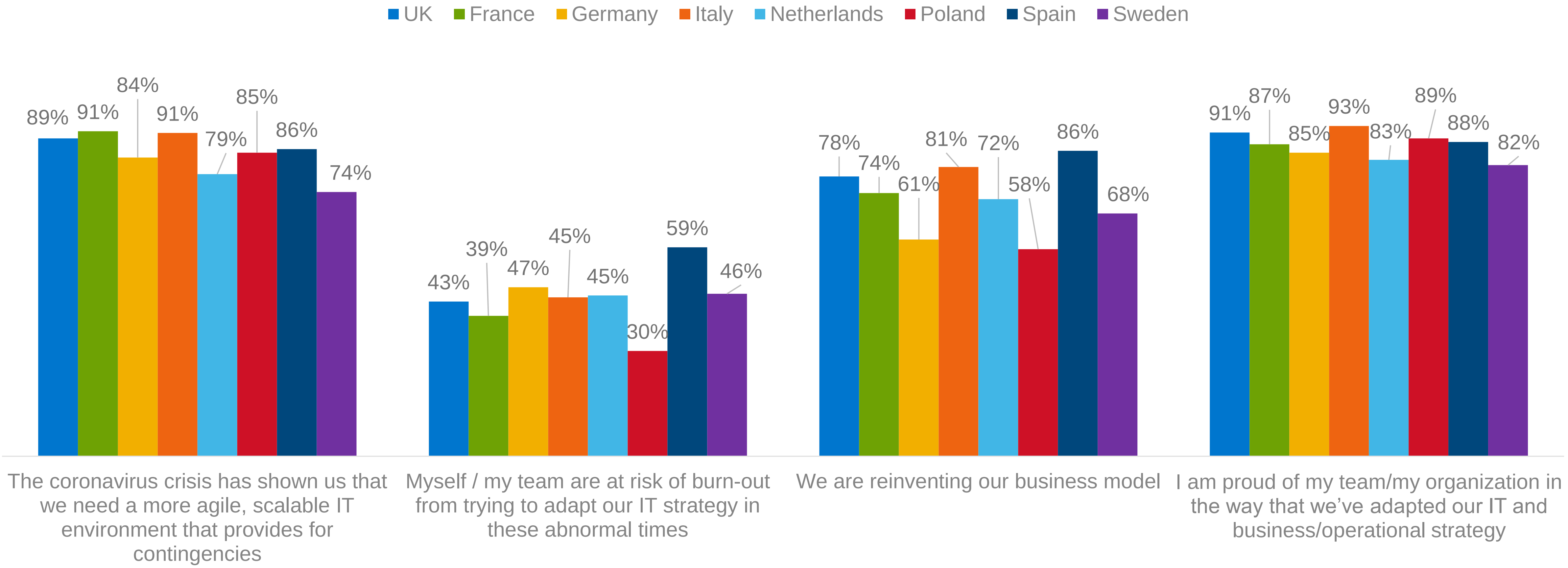
Adapting to Unprecedented Upheaval



"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"
Base: all 2020 respondents (4300) Europe (1900). Showing the proportion of respondents who selected "Strongly agree" or "Somewhat agree"

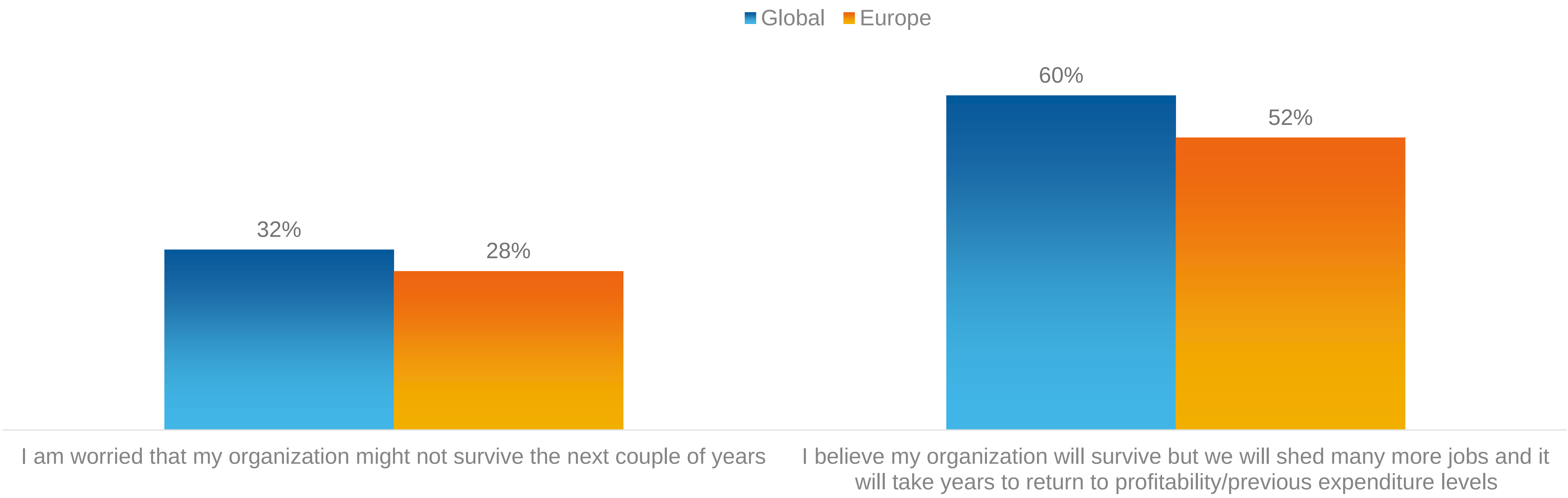
Europe

Adapting to Unprecedented Upheaval



"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"
Base: respondents from Europe (1900). Showing the proportion of respondents who selected "Strongly agree" or "Somewhat agree"

Survival Expectations



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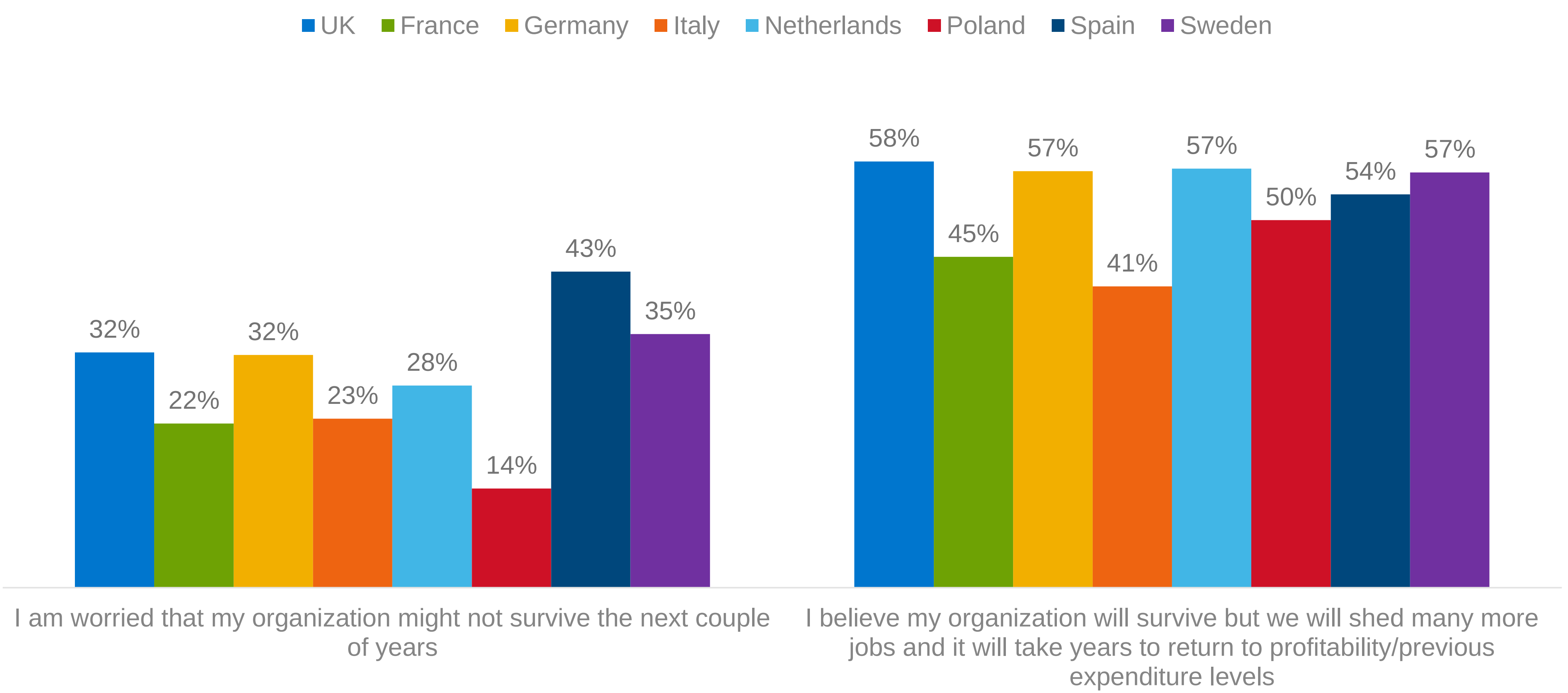
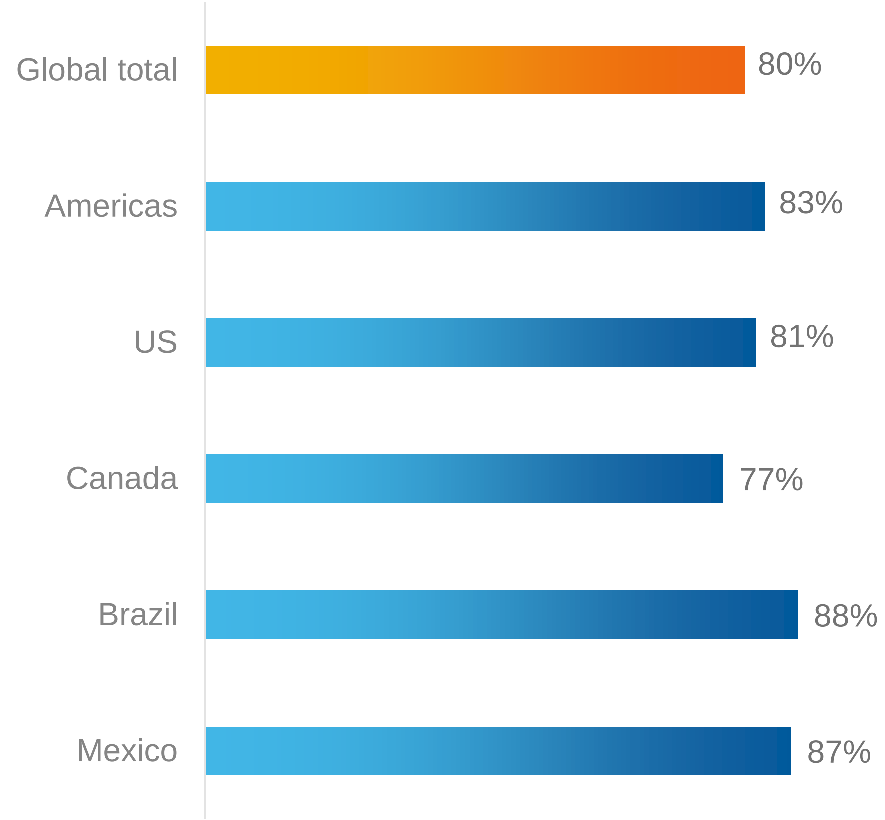
Survival Expectations



"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"
Base: respondents from Europe (1900). Showing the proportion of respondents who selected "Strongly agree" or "Somewhat agree"

Americas

Digital Transformation Acceleration



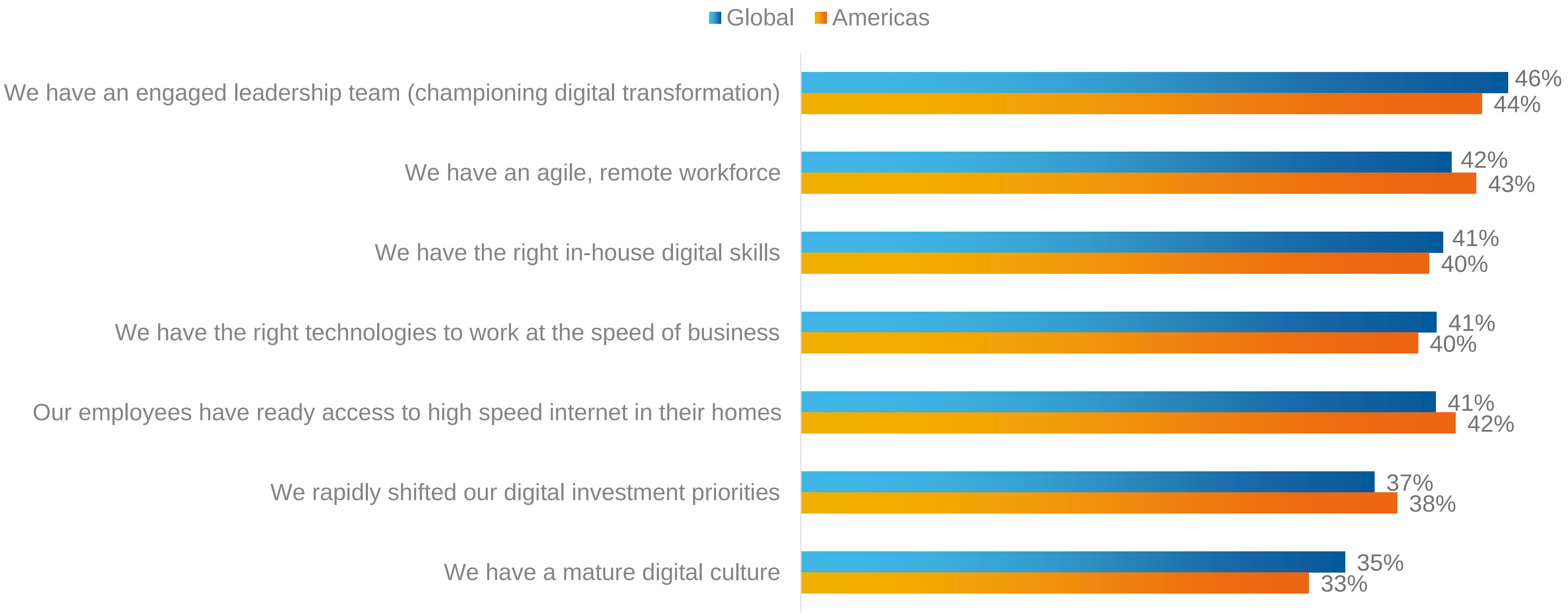
“Have you successfully accelerated any of your digital transformation programs this year?”
Base: all 2020 respondents (4300) Americas (1000) Showing the proportion of respondents who selected “Yes, for all of our digital transformation programs”, “Yes, for most of our digital transformation programs” or “Yes, for some of our digital transformation programs”

Top Three Digital Transformation Programs Accelerated

		US	Canada	Brazil	Mexico
1	Strengthening our cybersecurity defenses: 48% (Same proportion as the global average)	Strengthening our cybersecurity defenses: 48%	Strengthening our cybersecurity defenses: 51%	Rolling out broader remote working capabilities: 58%	Strengthening our cybersecurity defenses: 54%
2	Rolling out broader remote working capabilities: 42% (2% less than the global average)	Using data in completely new ways: 41%	Rolling out broader remote working capabilities: 40%	Rolling out broader remote working capabilities: 45%	Rolling out broader remote working capabilities: 43%
3	Reinventing how we deliver digital experiences to customers and employees: 38% (Same proportion as the global average)	Reinventing how we deliver digital experiences: 38%	Transforming our services and consumption models: 37%	Strengthening our cybersecurity defenses: 41%	Transforming our Edge deployments: 40%

“Which digital transformation programs have you successfully accelerated this year?”
Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427) Americas (826)

Acceleration Enablers

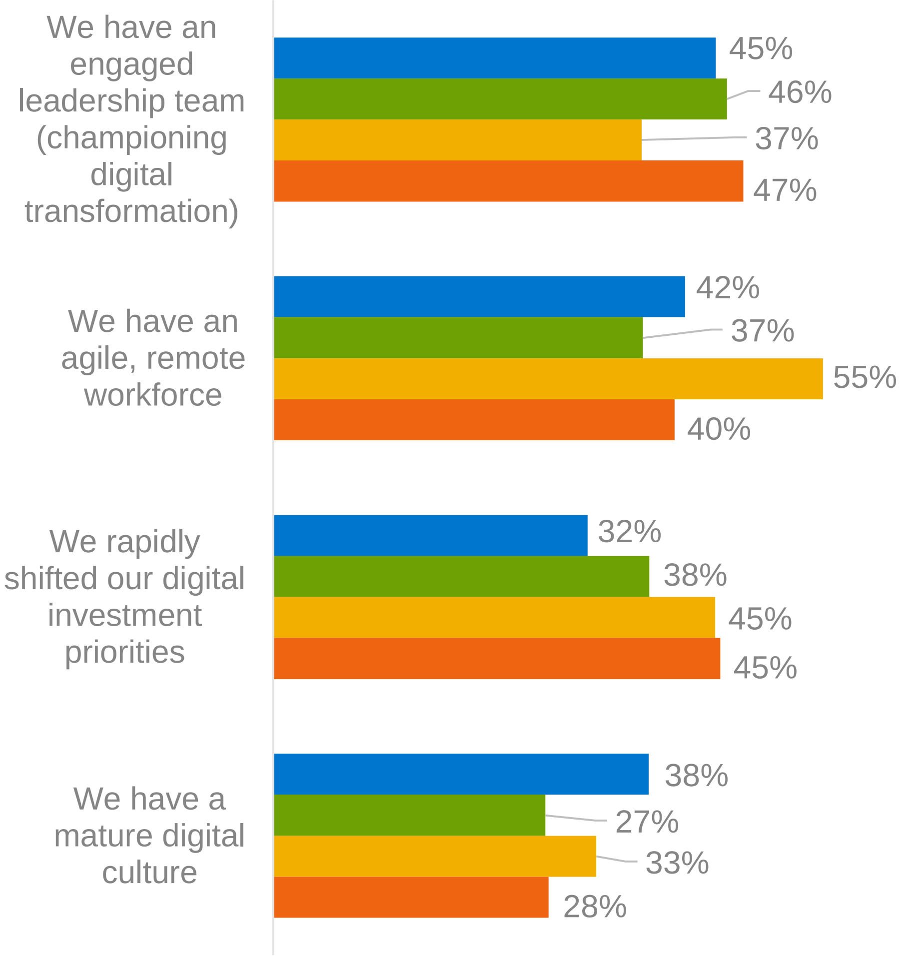


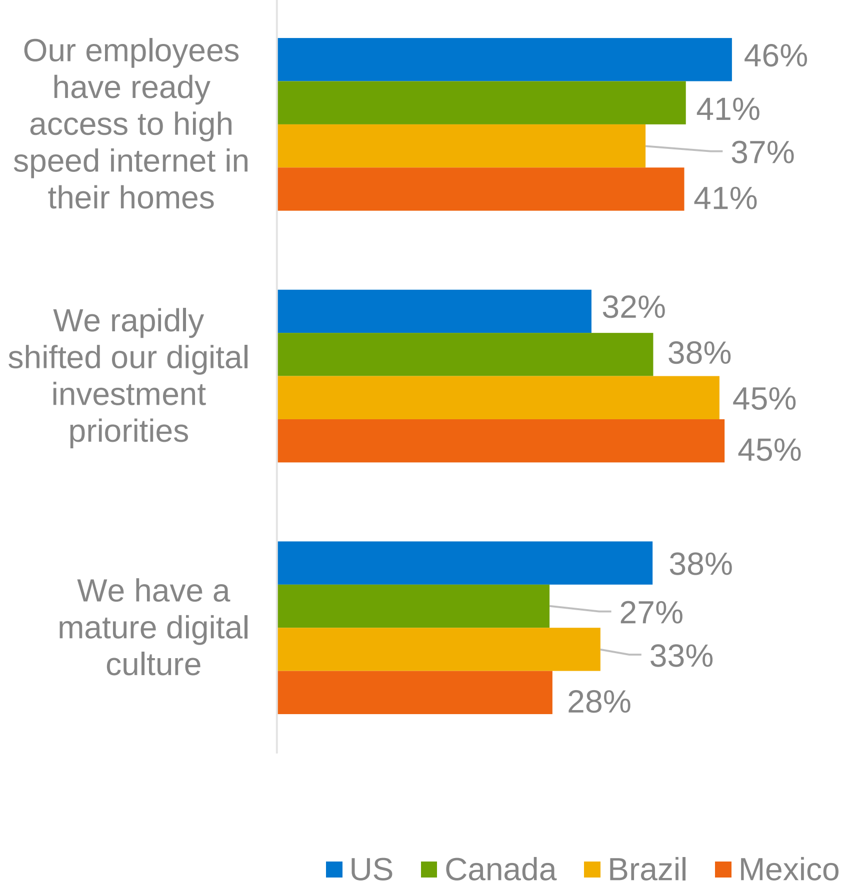
"What enabled you to successfully accelerate your transformation programs?"
Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), Americas (826)

DELL Technologies

Acceleration Enablers

Americas

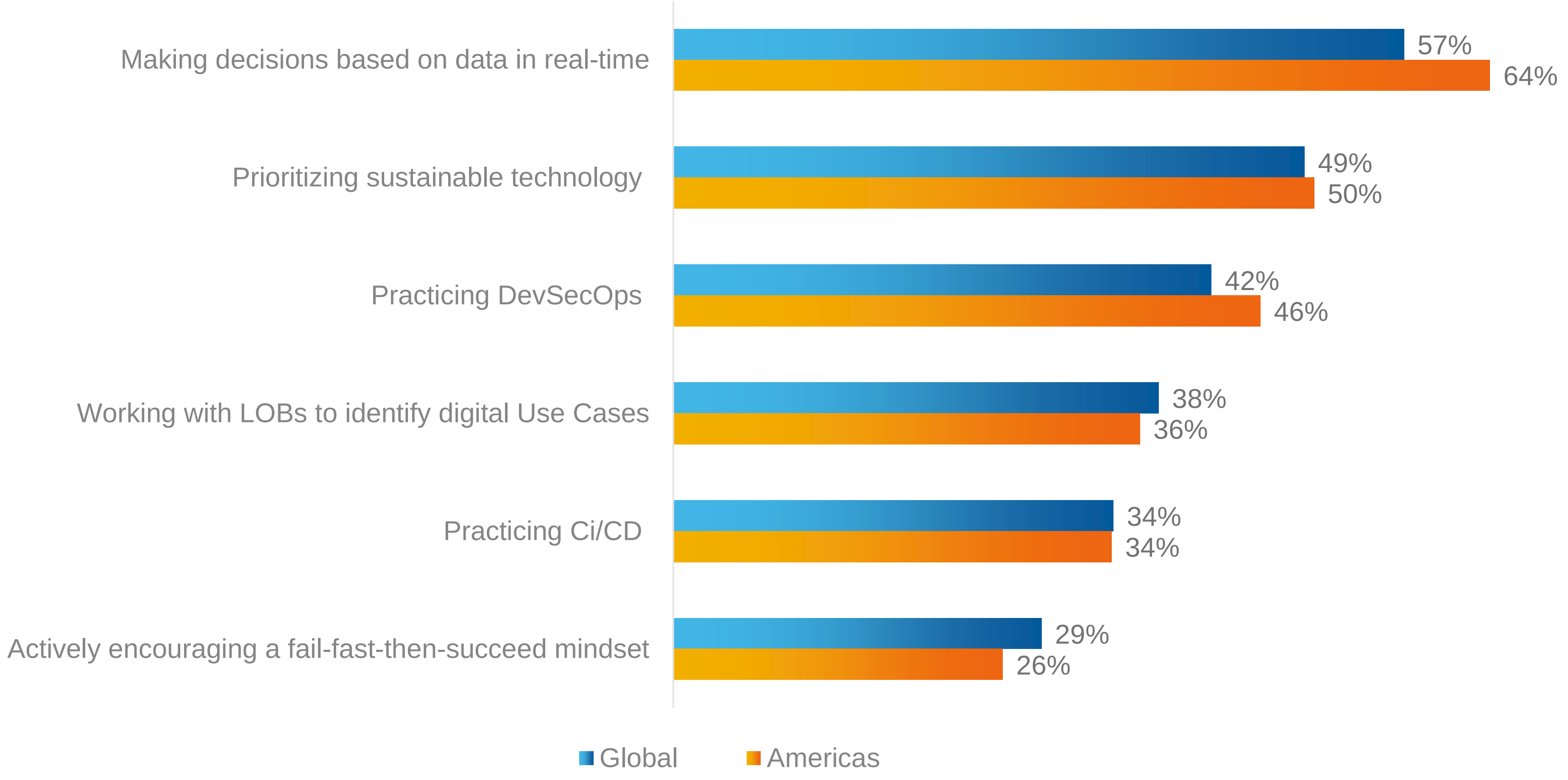




"What enabled you to successfully accelerate your transformation programs?"
Base: respondents from organizations which have successfully accelerated at least some digital transformation programs (3427), Americas (826)

Americas

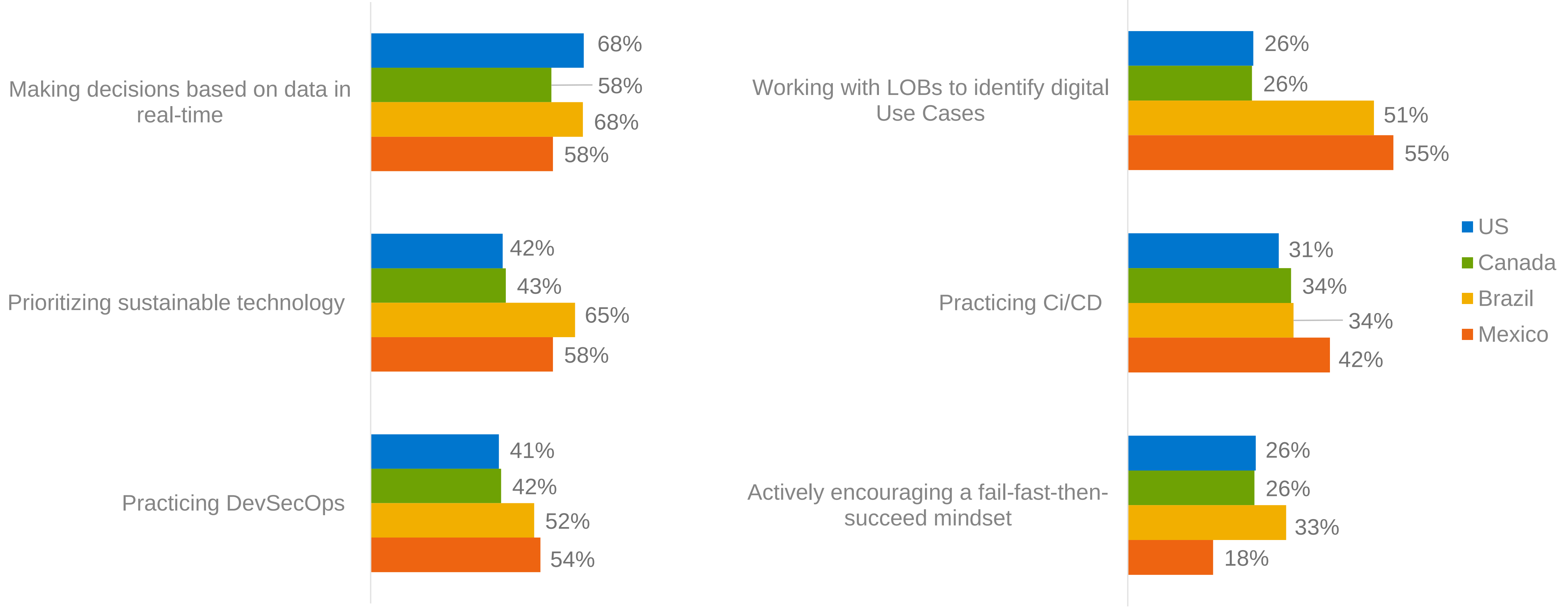
Digital Transformation Strategies



"Thinking about your digital transformation strategy, which of the following is your organization doing?"
Base: all 2020 respondents (4300) Americas (1000). Not showing "Don't know" or "None of these"

DELL Technologies

Digital Transformation Strategies



"Thinking about your digital transformation strategy, which of the following is your organization doing?"
Base: all 2020 respondents (4300) Americas (1000). Not showing "Don't know" or "None of these"

Top Three Barriers To Digital Transformation

		US	Canada	Brazil	Mexico
1	Data privacy and security concerns: 33% (2% more than the global average)	Data privacy and security concerns: 37%	Lack of budget and resources: 44%	Lack of economic growth: 35%	Lack of the right in-house skill sets and expertise: 30%
2	Lack of budget and resources: 31% (1% more than the global average)	Lack of budget and resources: 31%	Data privacy and security concerns: 37%	Unable to extract valuable insights from data and/or information overload: 33%	We are temporarily closed for business in relation to Covid-related disruption: 28%
3	Unable to extract valuable insights from data and/or information overload: 29% (Same proportion as the global average)	Unable to extract valuable insights from data and/or information overload: 31%	Unable to extract valuable insights from data and/or information overload: 29%	Data privacy and security concerns/ Lack of budget and resources: 28%	Immature digital culture: 26%

"What are the main barriers to digitally transforming your organization?"
Base: all 2020 respondents (4300) Americas (1000)

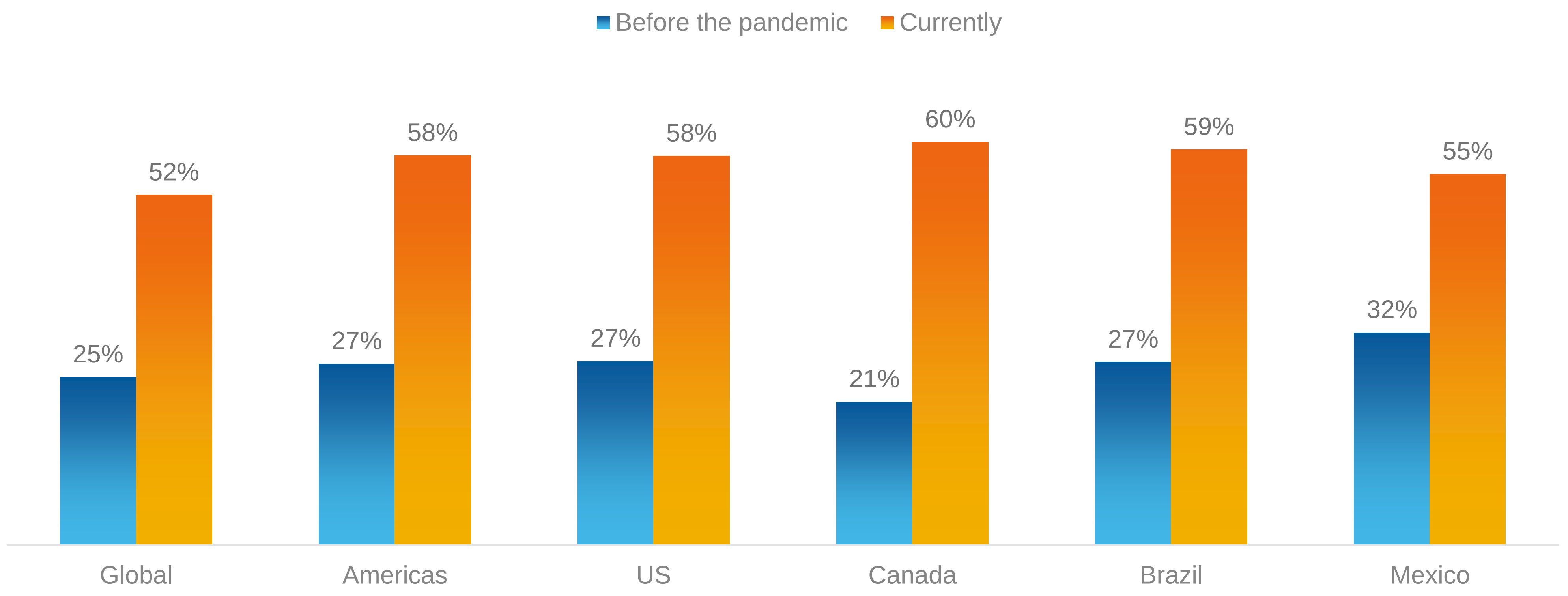
Americas

Top Three Tech Investments in 1-3 years

		US	Canada	Brazil	Mexico
1	Cybersecurity solutions: 45% (2% more than the global average)	Cybersecurity solutions: 46%	Cybersecurity solutions: 46%	5G infrastructure: 53%	Cybersecurity solutions: 50%
2	Data management tools: 42% (3% more than the global average)	Data management tools: 40%	Data management tools: 46%	Privacy software: 52%	Privacy software: 48%
3	Privacy software: 41% (6% more than the global average)	5G infrastructure: 39%	Multi-cloud environment: 37%	Data management tools: 46%	Software: containers and serverless: 41%

“What new innovations or solutions is your organization investing in over the next 1-3 years to enable digital business?”
Base: all 2020 respondents (4300) Americas (1000)

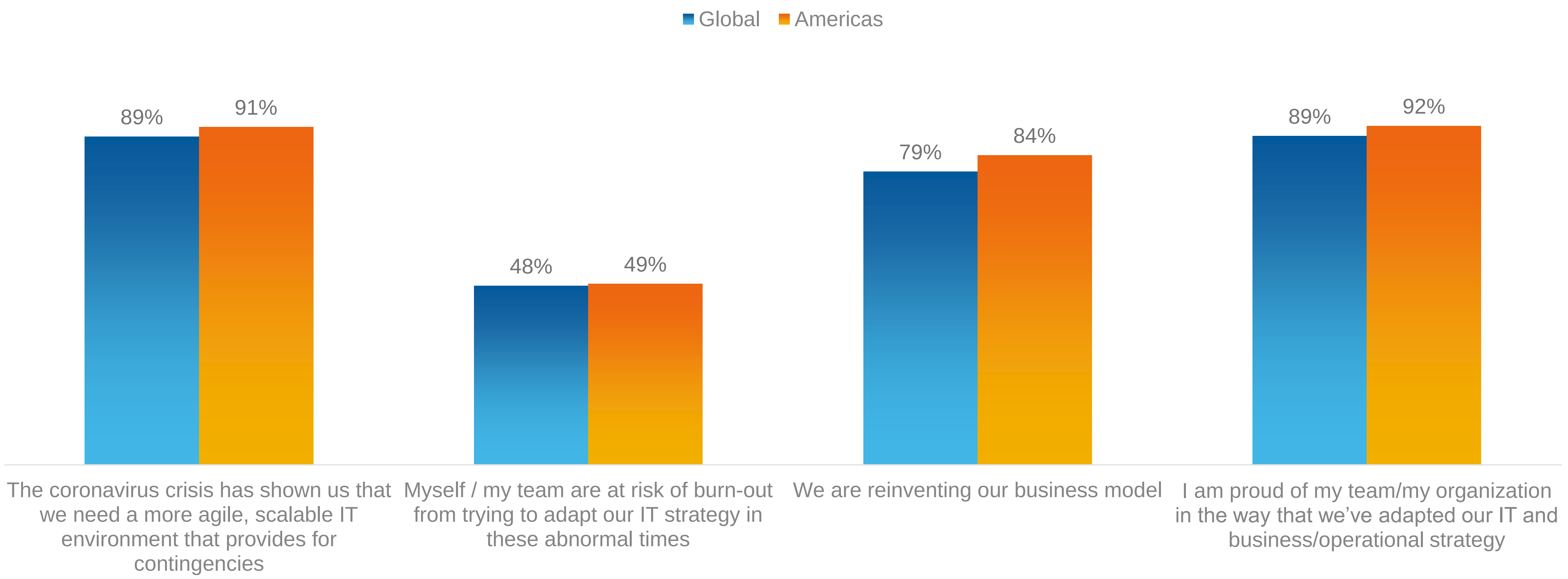
Proportion Of Staff Working Remotely



"What proportion of your organization's staff worked remotely before the pandemic/are currently working remotely?"
Base: all 2020 respondents (4300) Americas (1000)

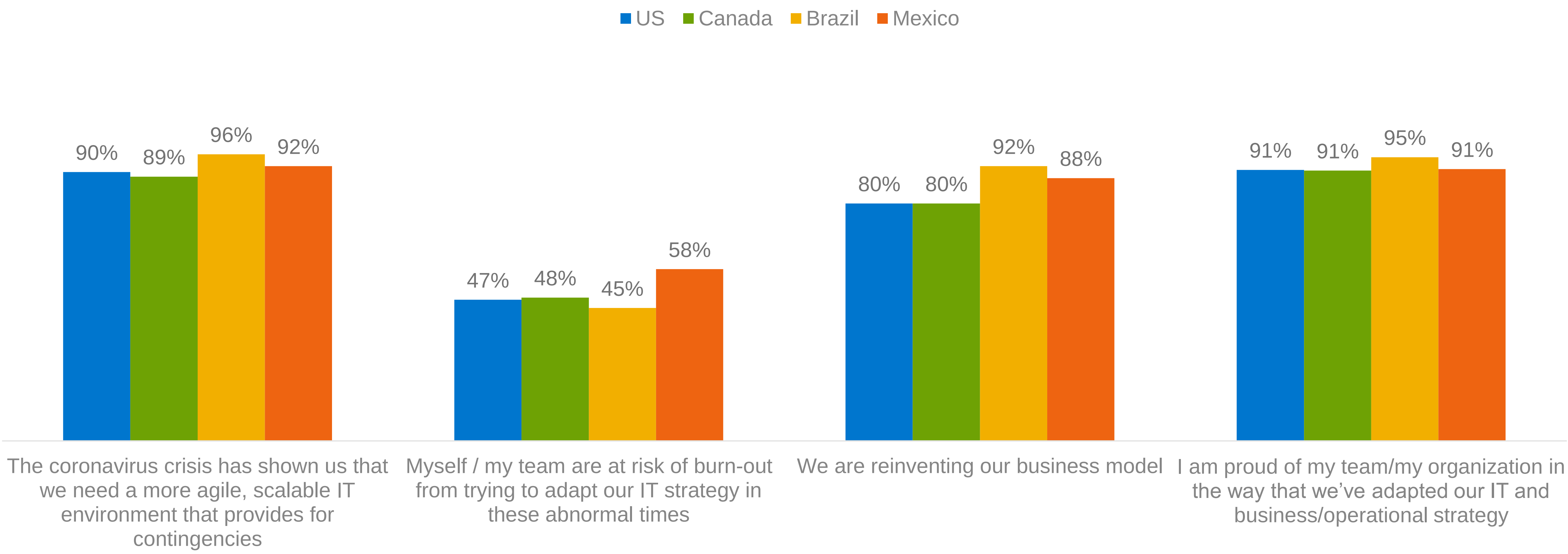
DELL Technologies

Adapting to Unprecedented Upheaval



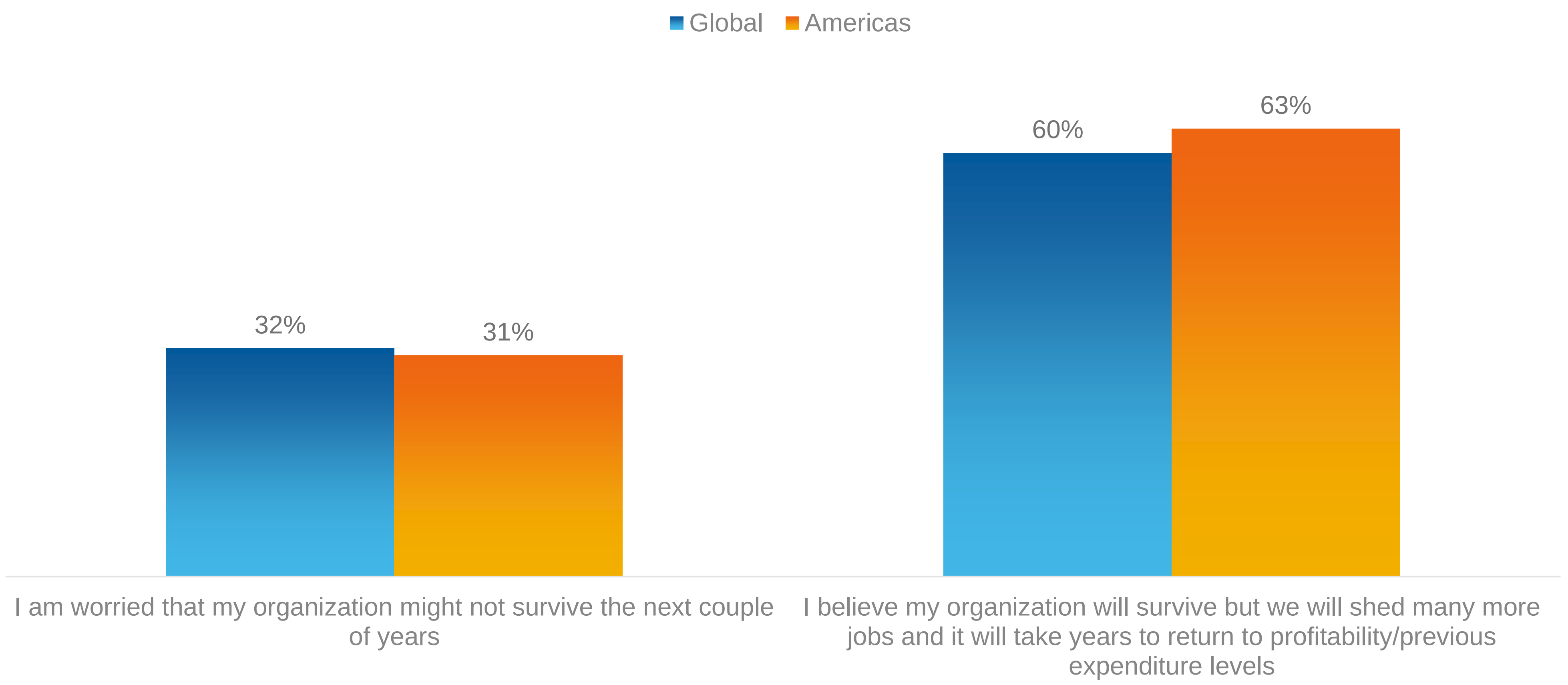
"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"
Base: all 2020 respondents (4300) Americas (1000). Showing the proportion of respondents who selected "Strongly agree" or "Somewhat agree"

Adapting to Unprecedented Upheaval



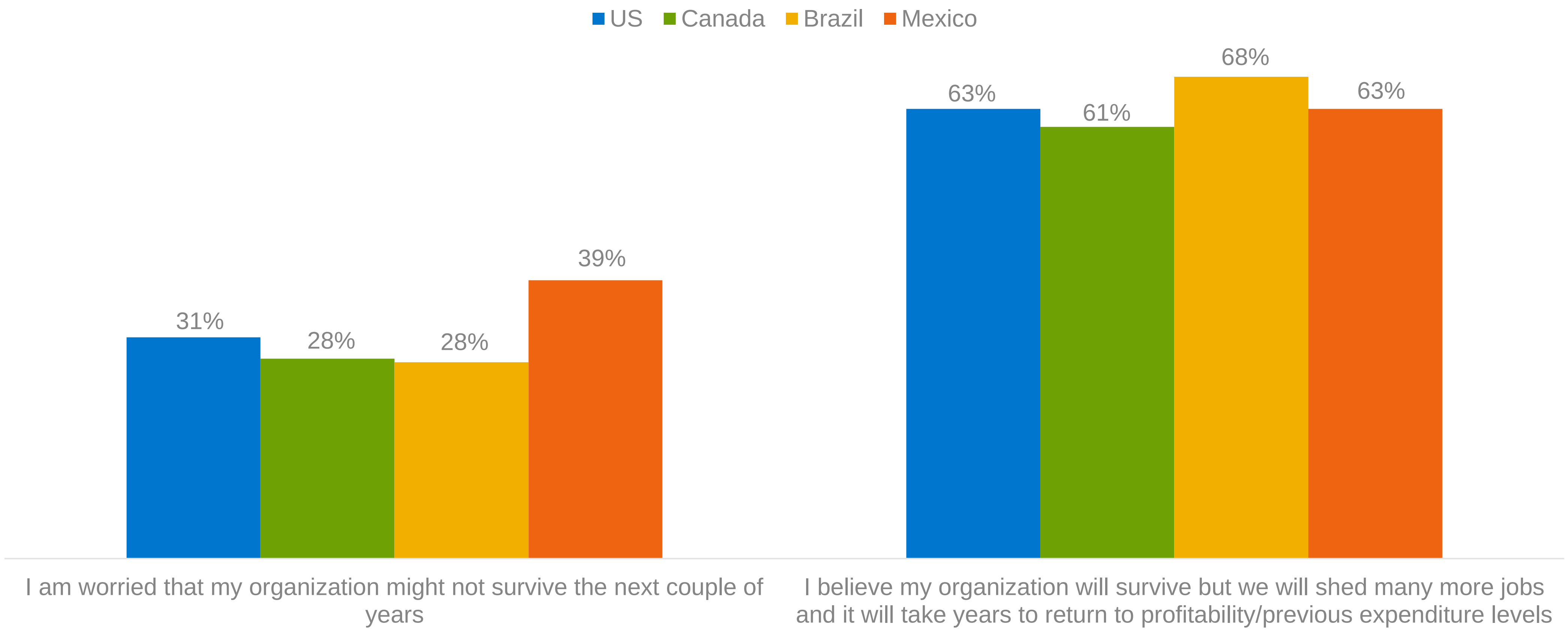
"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"
Base: respondents from the Americas (1000). Showing the proportion of respondents who selected "Strongly agree" or "Somewhat agree"

Survival Expectations



"As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?"
Base: all 2020 respondents (4300) Americas (1000). Showing the proportion of respondents who selected "Strongly agree" or "Somewhat agree"

Survival Expectations



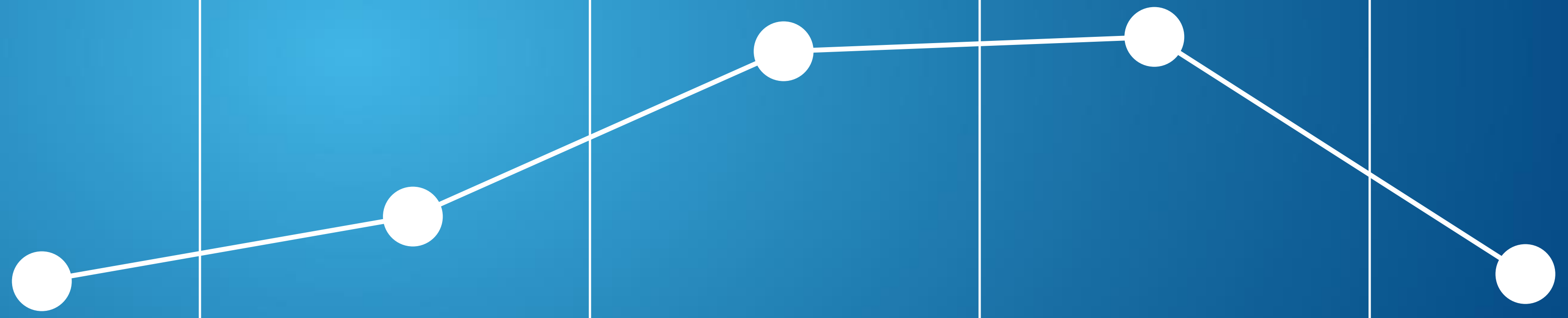
“As a result of the business disruption this year, to what extent do you agree or disagree with the following statements?”
Base: respondents from the Americas (1000). Showing the proportion of respondents who selected “Strongly agree” or “Somewhat agree”

11 Individual Country Curves

APJC

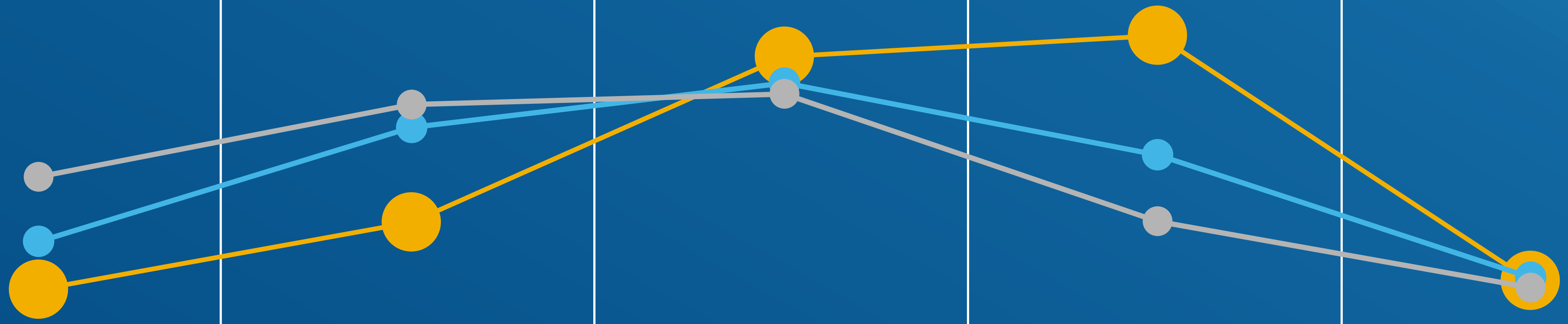
Digital Transformation Index 2020 – APJC

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
5%	14%	37%	39%	6%



Digital Transformation Index Over the Years
APJC

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business

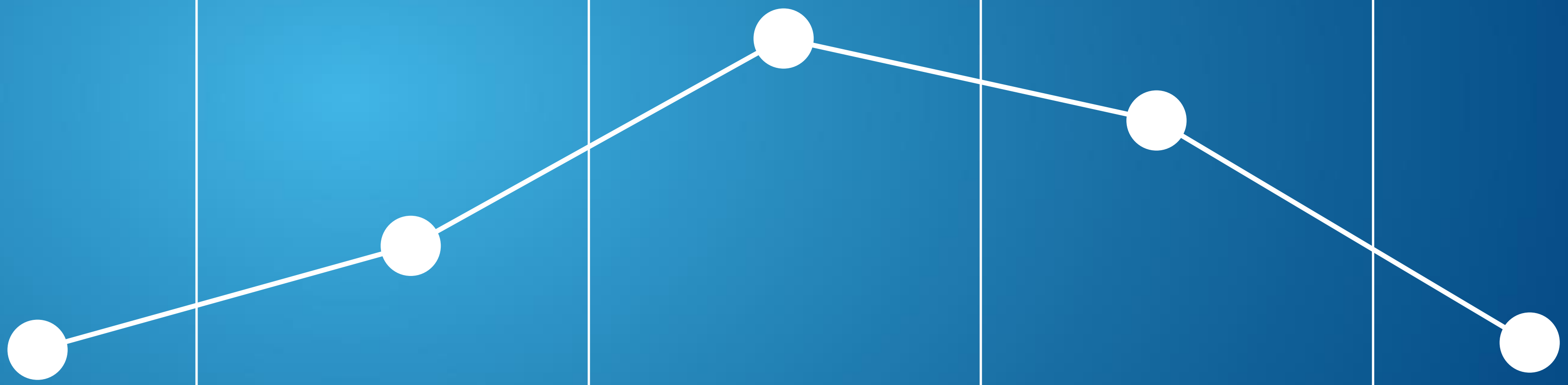


	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**5%**	**14%**	**37%**	**39%**	**6%**
2018	11%	27%	33%	23%	6%
2016	20%	30%	31%	14%	5%

DELL Technologies

Digital Transformation Index 2020 – Australia & New Zealand

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
2%	16%	45%	34%	3%



DELL Technologies

Digital Transformation Index Over the Years
Australia & New Zealand

Digital Laggards

Do not have a digital plan; limited initiatives and investments in place

Digital Followers

Very few digital investments; tentatively planning for the future

Digital Evaluators

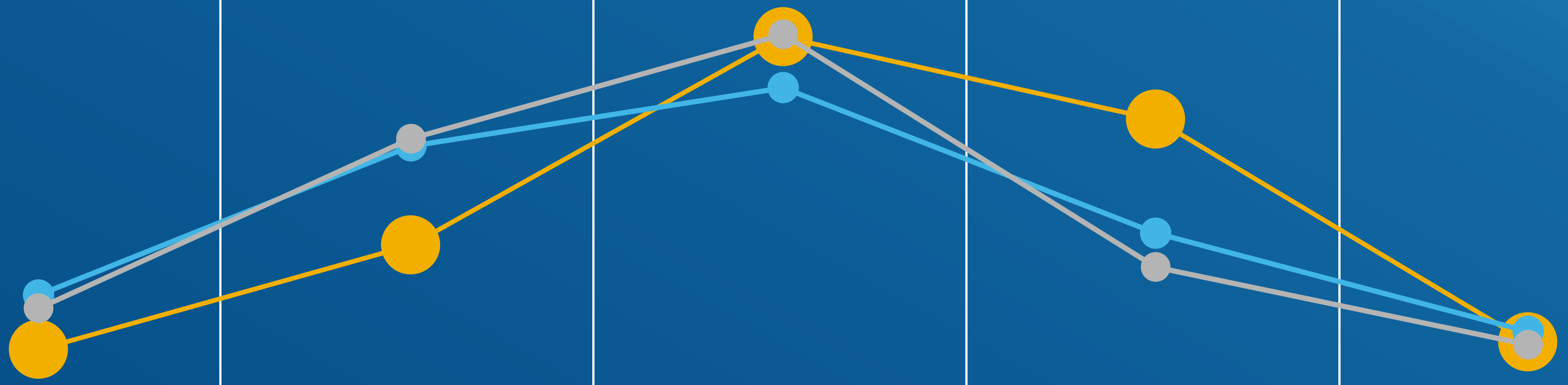
Gradually embracing digital transformation and planning for the future

Digital Adopters

Have a mature digital plan, investments and innovations in place

Digital Leaders

Digital transformation is ingrained in the DNA of the business

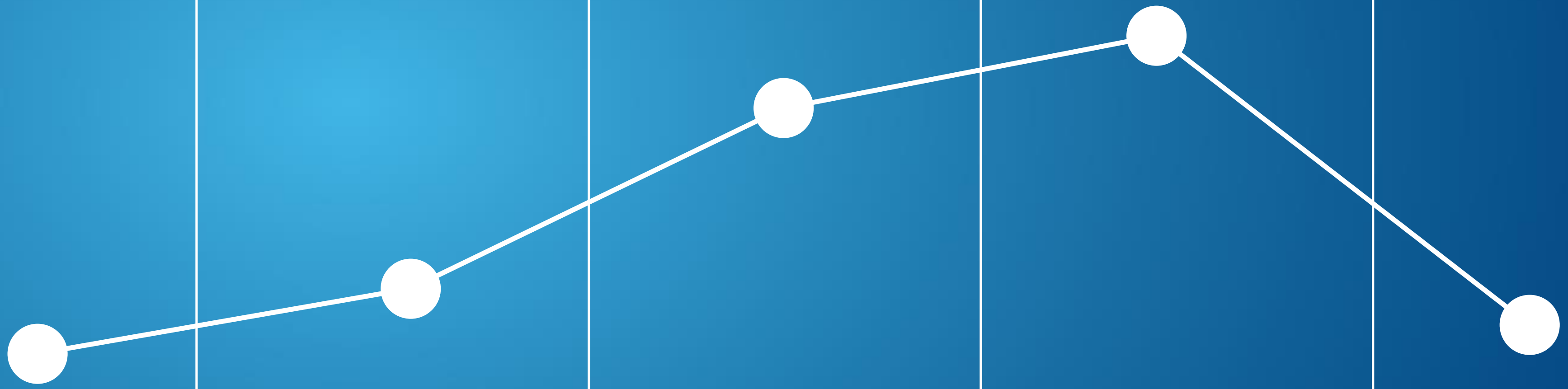


	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**2%**	**16%**	**45%**	**34%**	**3%**
2018	10%	30%	38%	18%	5%
2016	8%	31%	45%	13%	3%

DELL Technologies

Digital Transformation Index 2020 – Greater China

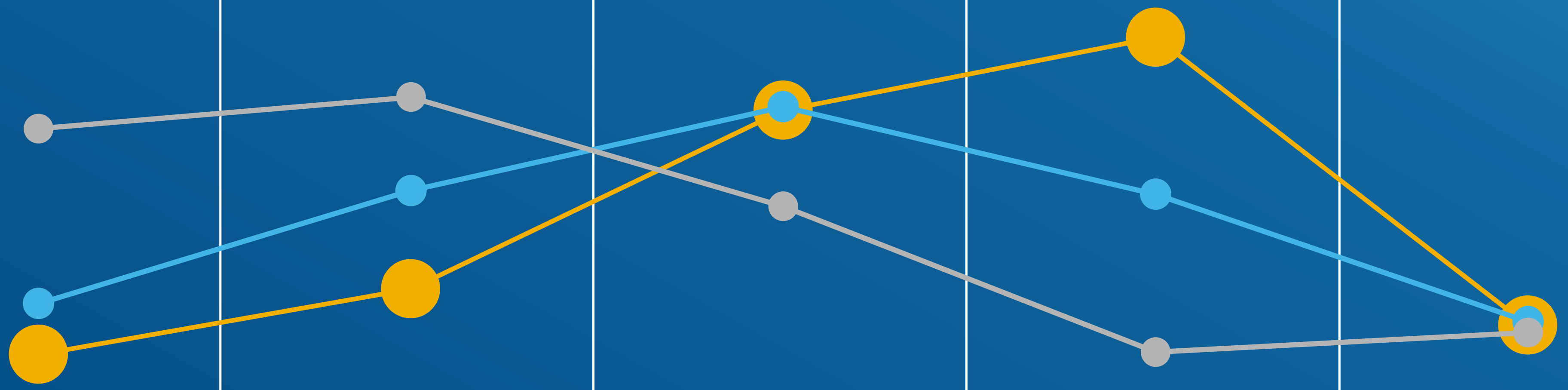
Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
2%	11%	36%	46%	6%



DELL Technologies

Digital Transformation Index Over the Years
Greater China

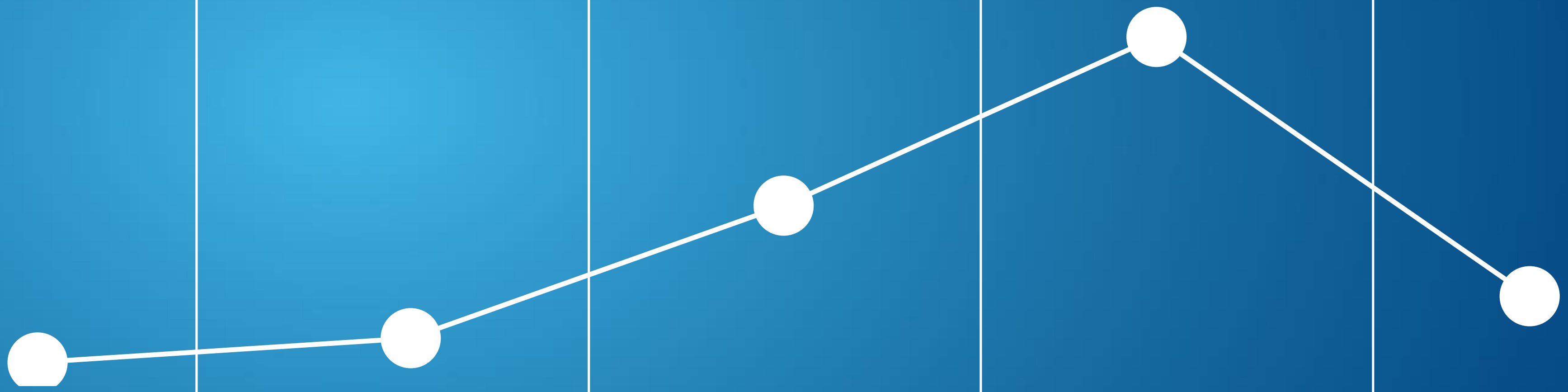
	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
	Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business
2020	**2%**	**11%**	**36%**	**46%**	**6%**
2018	9%	25%	36%	24%	7%
2016	33%	37%	22%	2%	5%



DELL Technologies

Digital Transformation Index 2020 – India

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
1%	5%	27%	55%	12%



DELL Technologies

Digital Transformation Index Over the Years
India

Digital Laggards

Do not have a digital plan; limited initiatives and investments in place

Digital Followers

Very few digital investments; tentatively planning for the future

Digital Evaluators

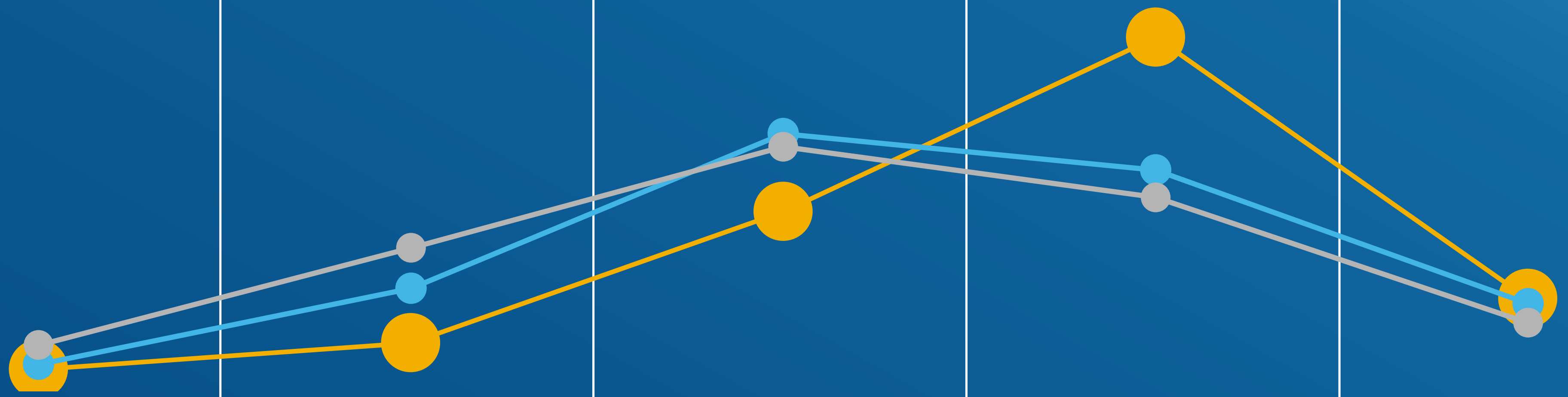
Gradually embracing digital transformation and planning for the future

Digital Adopters

Have a mature digital plan, investments and innovations in place

Digital Leaders

Digital transformation is ingrained in the DNA of the business

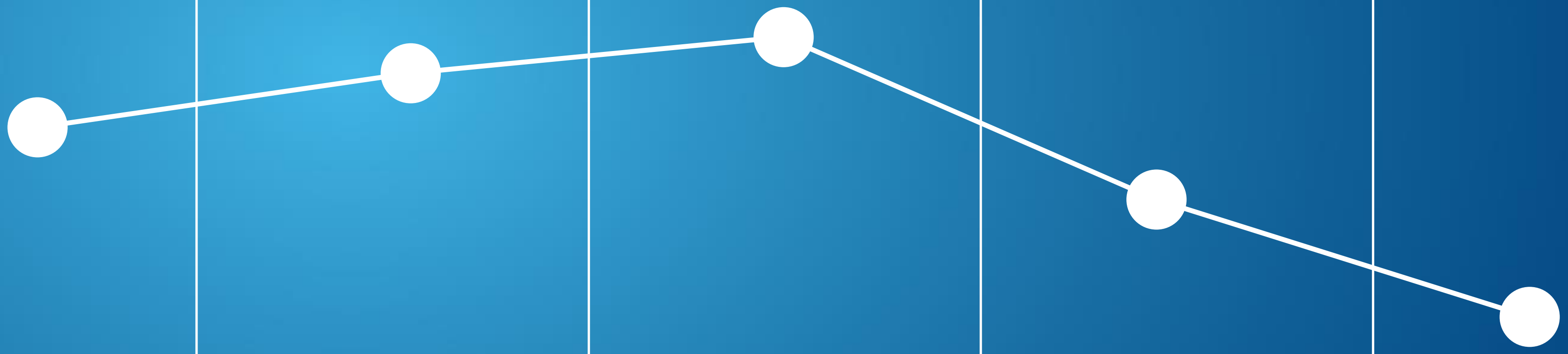


	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**1%**	**5%**	**27%**	**55%**	**12%**
2018	2%	14%	40%	34%	12%
2016	5%	21%	37%	29%	8%

DELL Technologies

Digital Transformation Index 2020 – Japan

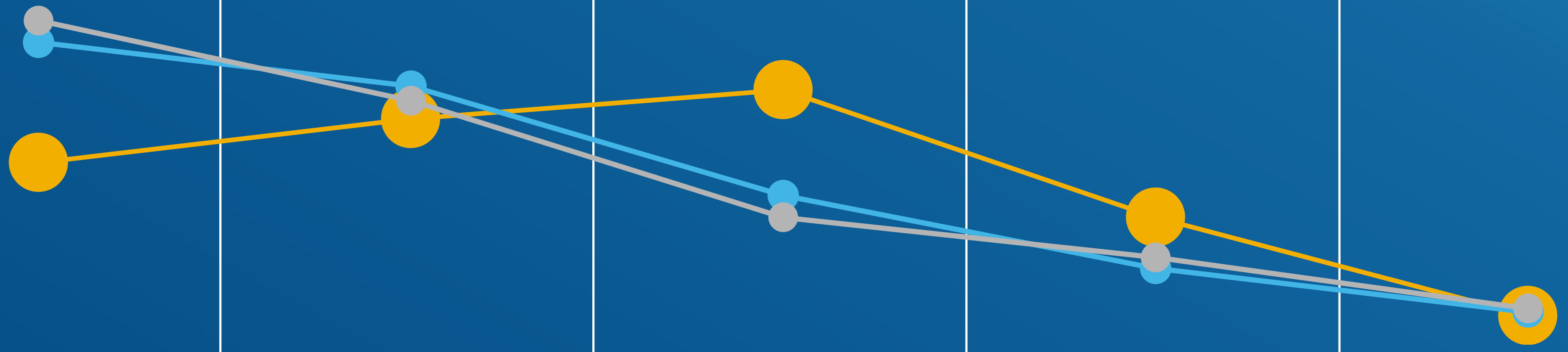
Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
23%	29%	33%	15%	2%



DELL Technologies

Digital Transformation Index Over the Years
Japan

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business

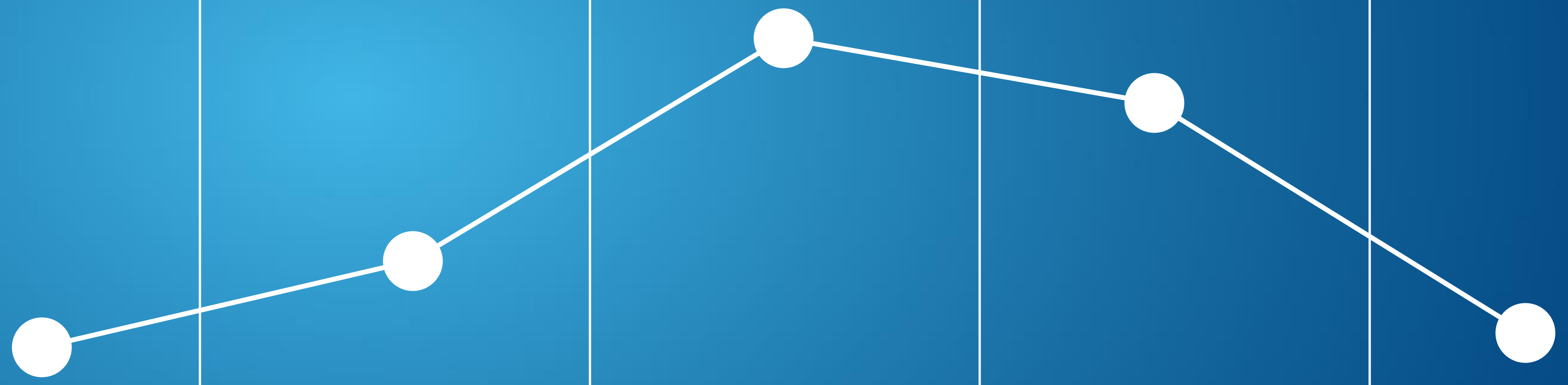


	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**23%**	**29%**	**33%**	**15%**	**2%**
2018	39%	33%	18%	8%	2%
2016	42%	31%	15%	10%	3%

DELL Technologies

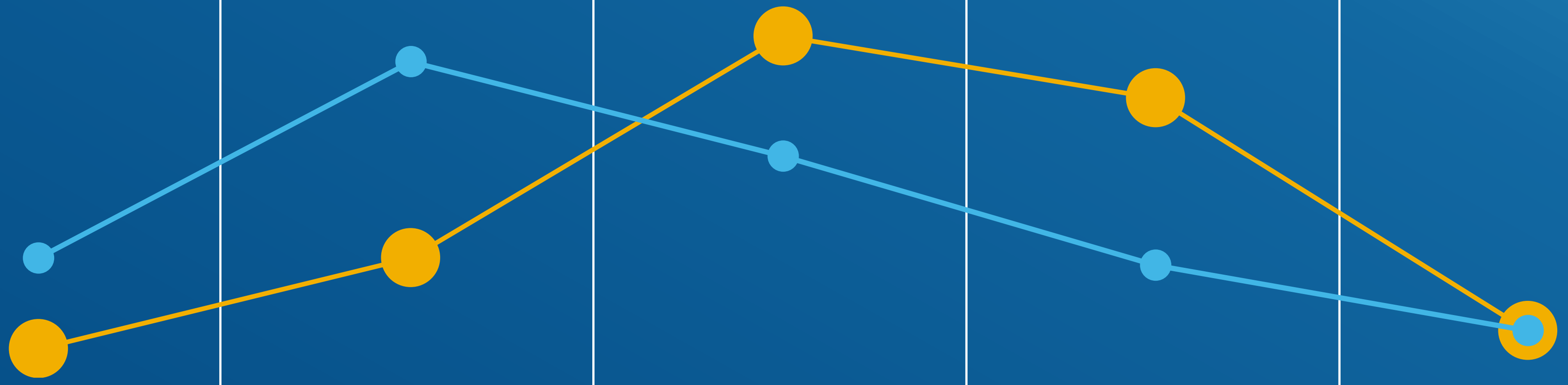
Digital Transformation Index 2020 – Singapore

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
2%	14%	45%	36%	4%



Digital Transformation Index Over the Years Singapore

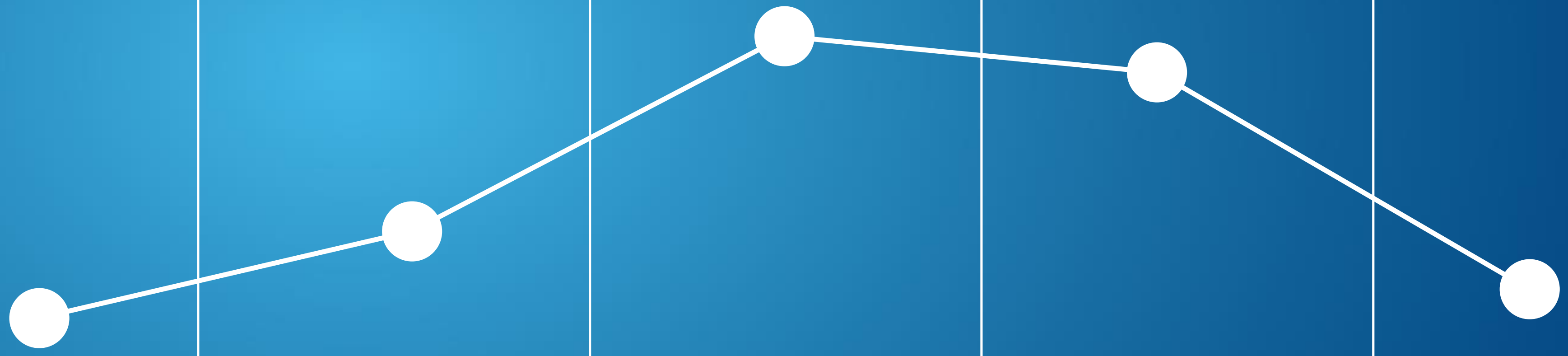
	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
	Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business
2020	**2%**	**14%**	**45%**	**36%**	**4%**
2018	14%	41%	28%	13%	4%



EUROPE

Digital Transformation Index 2020 – Europe

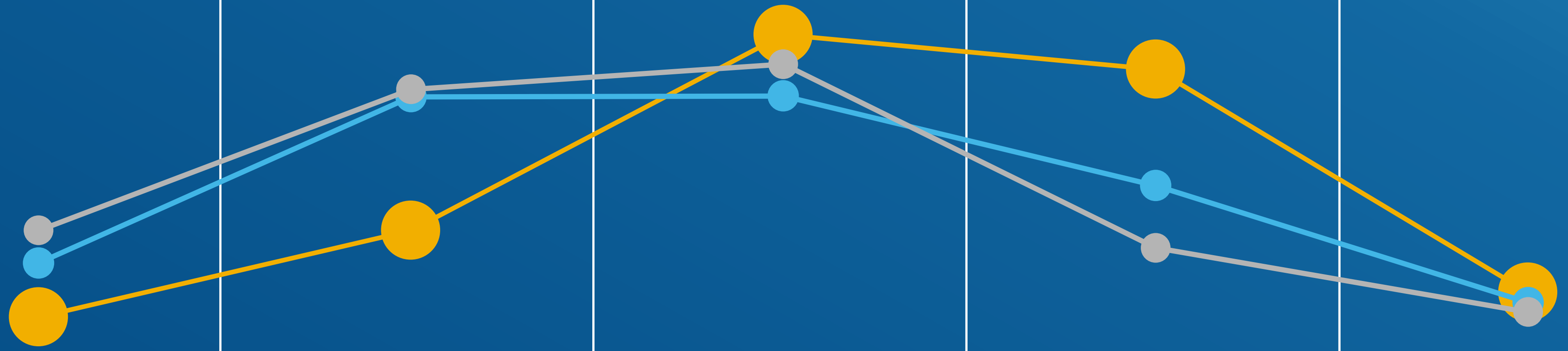
Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
2%	14%	41%	36%	6%



DELL Technologies

Digital Transformation Index Over the Years
Europe

	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
	Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business

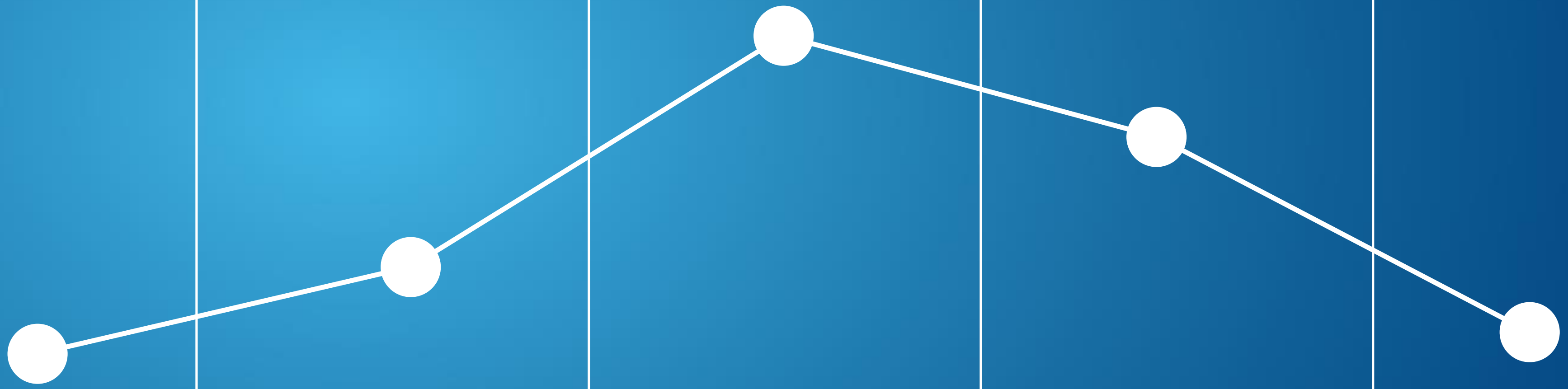


	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**2%**	**14%**	**41%**	**36%**	**6%**
2018	10%	33%	33%	20%	4%
2016	14%	34%	37%	12%	3%

DELL Technologies

Digital Transformation Index 2020 – UK

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
2%	14%	46%	32%	5%



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Digital Transformation Index Over the Years UK

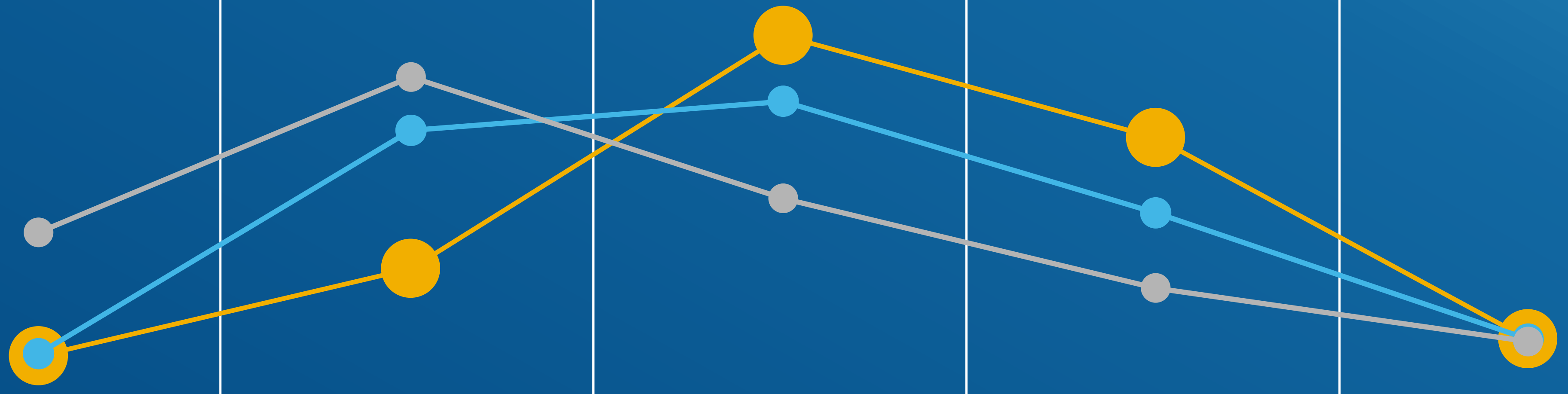
Digital Laggards
Do not have a digital plan; limited initiatives and investments in place

Digital Followers
Very few digital investments; tentatively planning for the future

Digital Evaluators
Gradually embracing digital transformation and planning for the future

Digital Adopters
Have a mature digital plan, investments and innovations in place

Digital Leaders
Digital transformation is ingrained in the DNA of the business

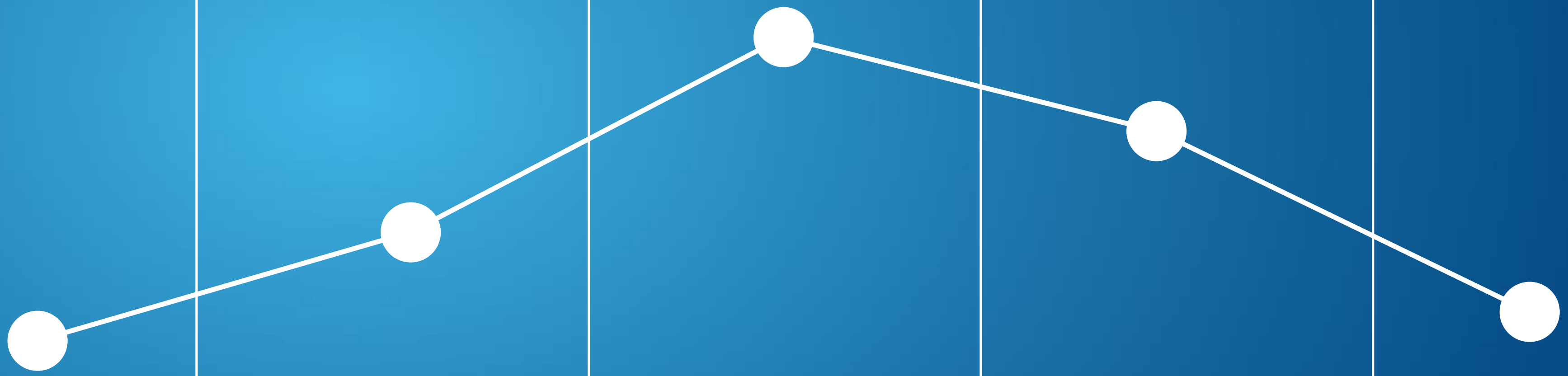


	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**2%**	**14%**	**46%**	**32%**	**5%**
2018	3%	33%	37%	22%	5%
2016	19%	41%	24%	12%	4%

DELL Technologies

Digital Transformation Index 2020 – France

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
2%	17%	44%	31%	6%



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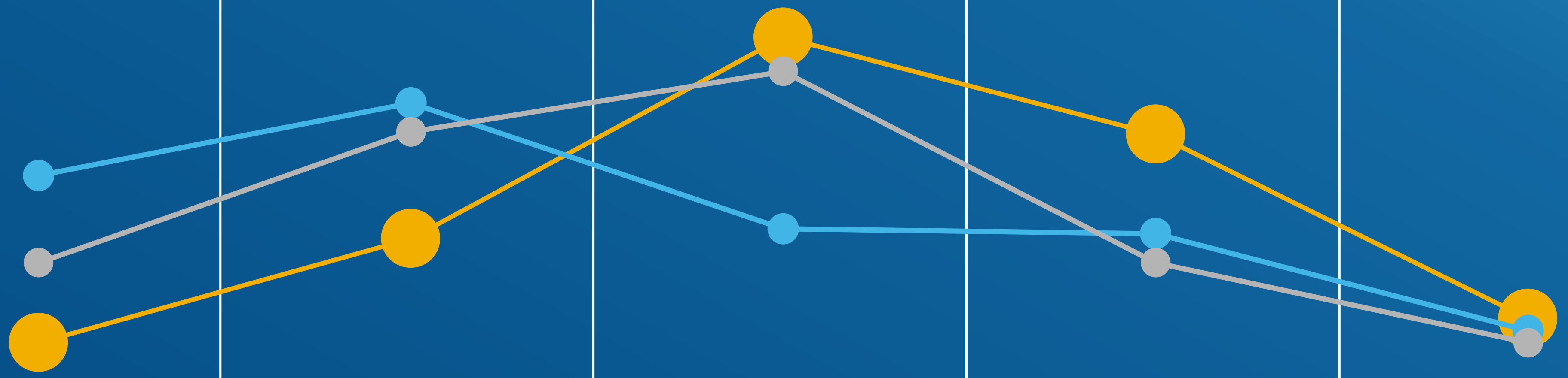
Digital Transformation Index Over the Years
France

	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
	Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business

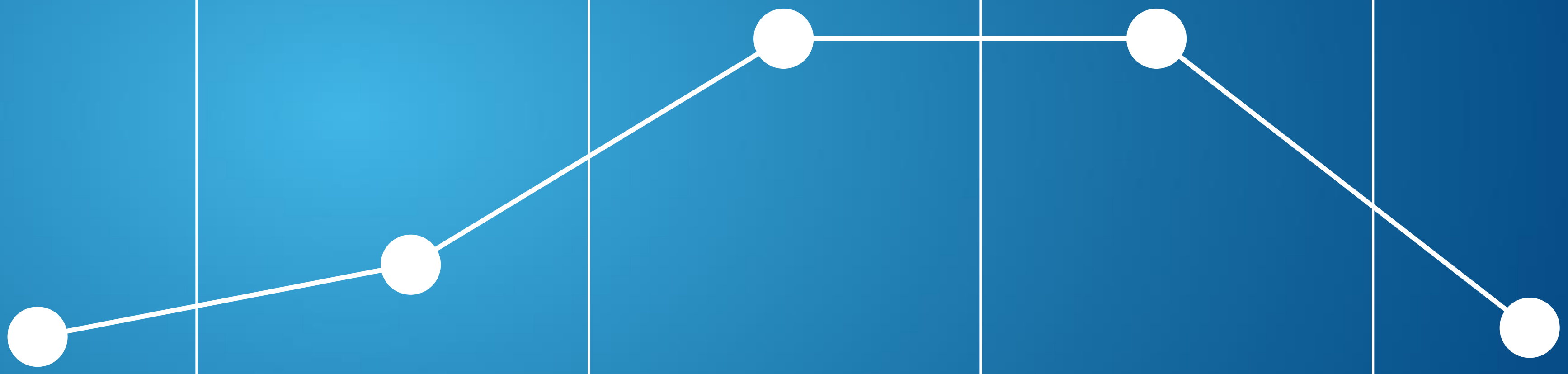


	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**2%**	**17%**	**44%**	**31%**	**6%**
2018	25%	35%	18%	17%	4%
2016	13%	31%	40%	13%	2%

DELL Technologies

Digital Transformation Index 2020 – Germany

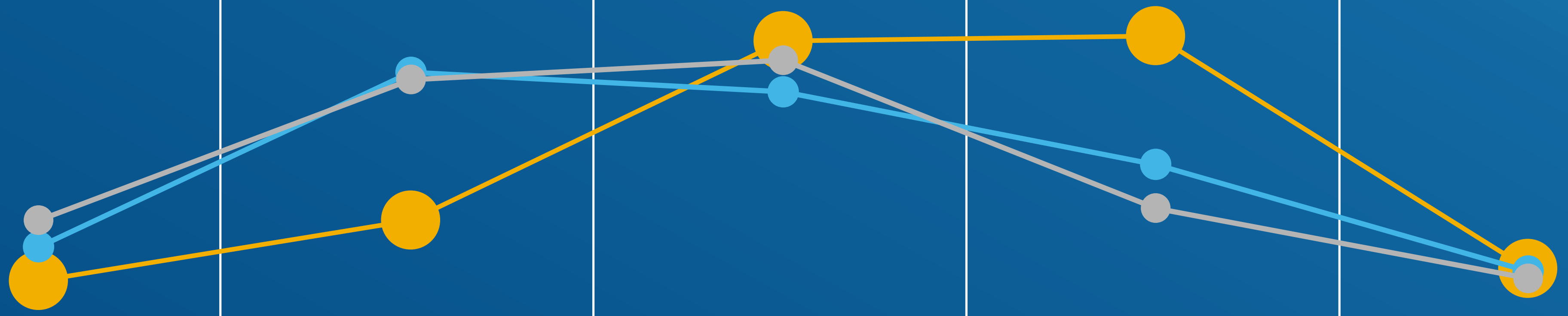
Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
5%	13%	38%	38%	6%



DELL Technologies

Digital Transformation Index Over the Years
Germany

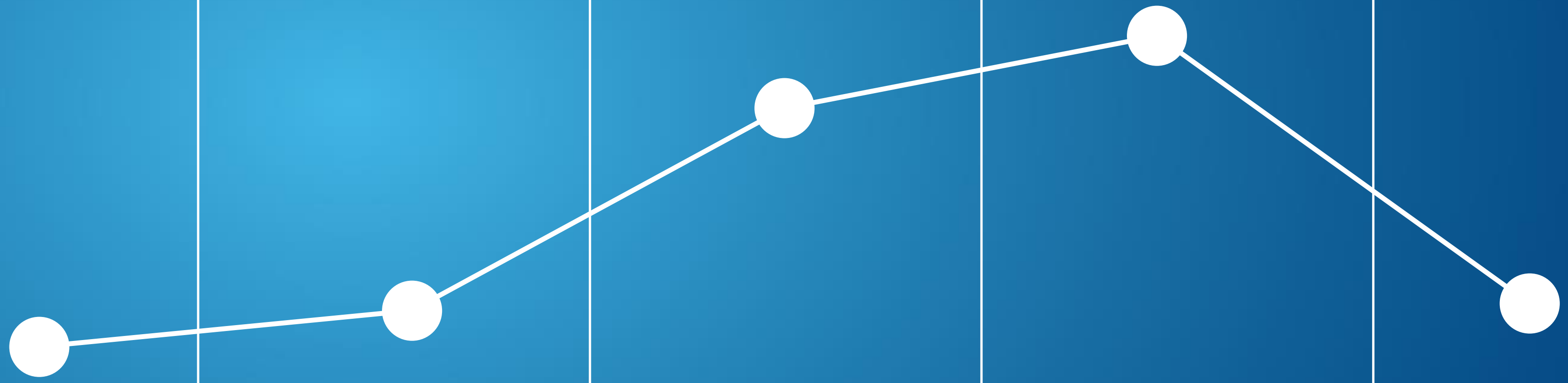
	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
	Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business
2020	**5%**	**13%**	**38%**	**38%**	**6%**
2018	9%	33%	31%	21%	4%
2016	13%	32%	35%	6%	2%



DELL Technologies

Digital Transformation Index 2020 – Italy

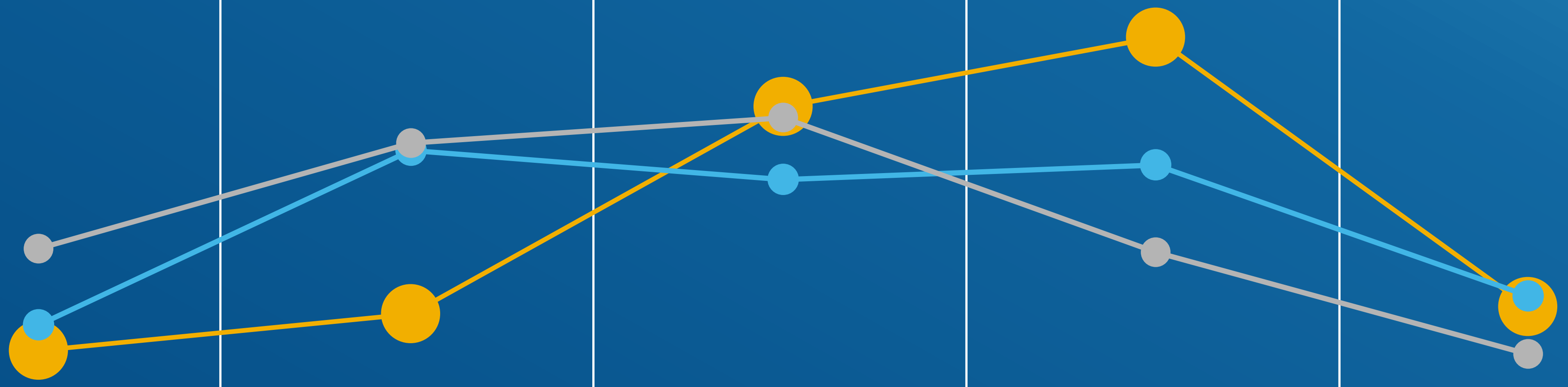
Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
3%	8%	36%	46%	9%



DELL Technologies

Digital Transformation Index Over the Years
Italy

	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
	Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business

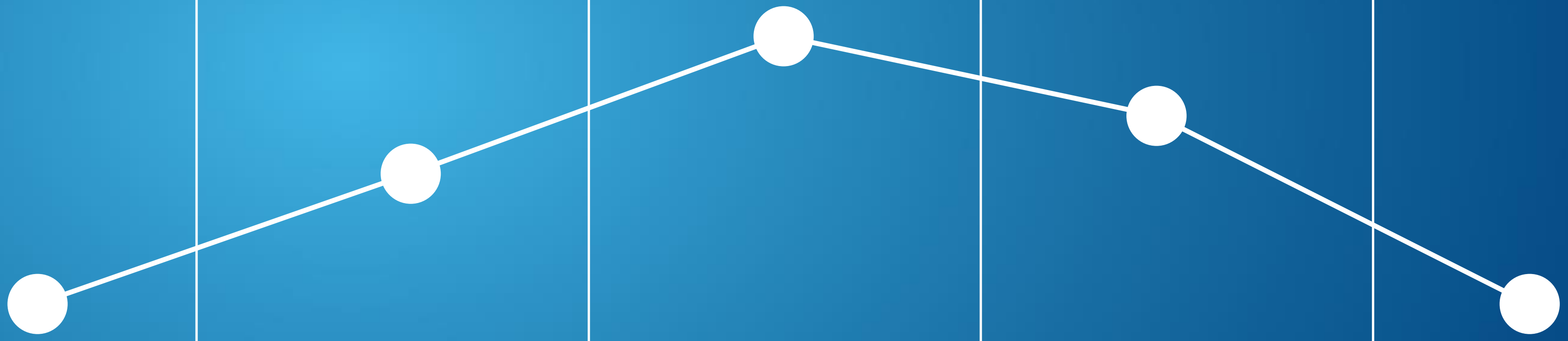


	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**3%**	**8%**	**36%**	**46%**	**9%**
2018	6%	30%	26%	28%	10%
2016	17%	31%	35%	16%	2%

DELL Technologies

Digital Transformation Index 2020 – Netherlands

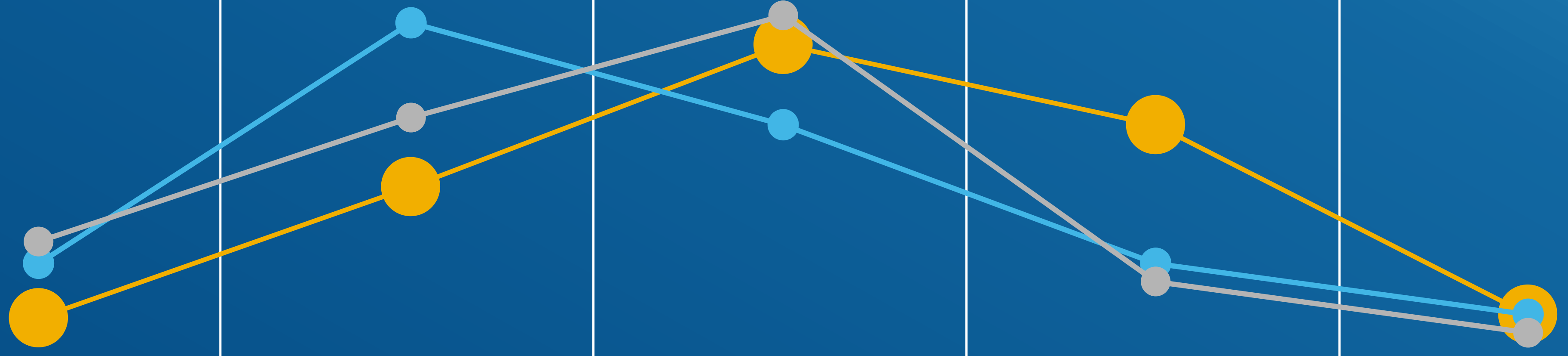
Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
4%	22%	41%	30%	4%



DELL Technologies

Digital Transformation Index Over the Years
Netherlands

	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
	Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business

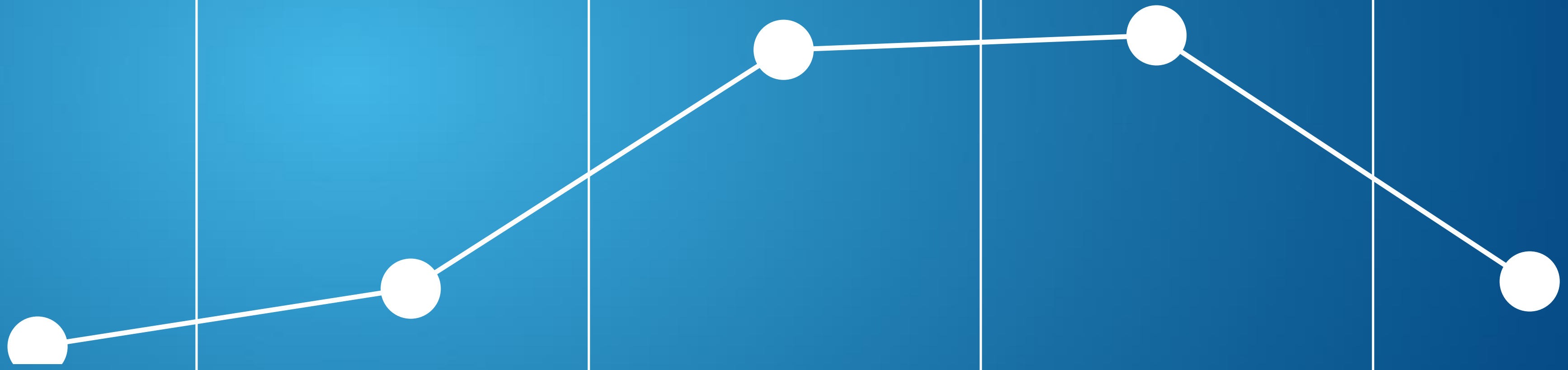


	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**4%**	**22%**	**41%**	**30%**	**4%**
2018	11%	44%	30%	11%	4%
2016	14%	31%	45%	9%	2%

DELL Technologies

Digital Transformation Index 2020 – Poland

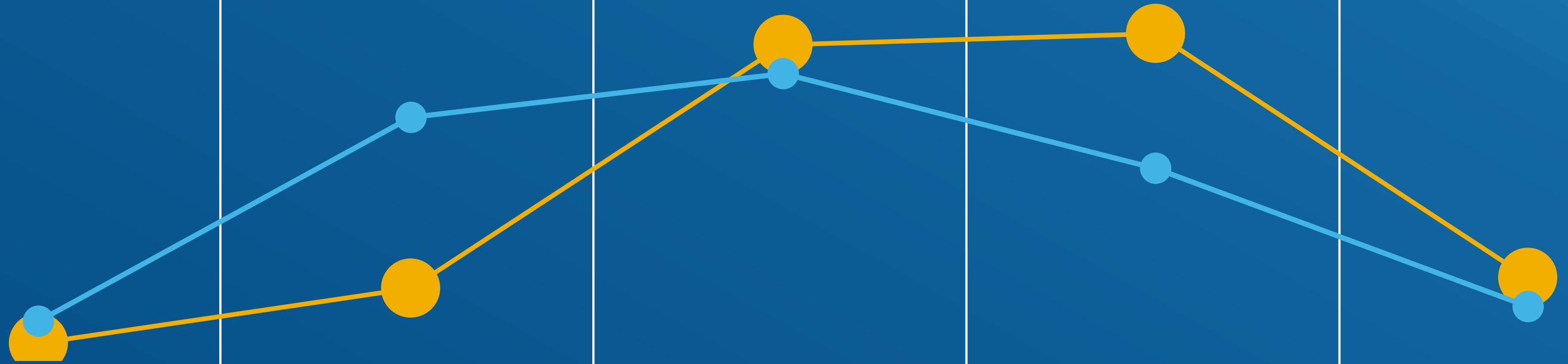
Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**



0%	8%	41%	43%	9%

Digital Transformation Index Over the Years
Poland

	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
	Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business



	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**0%**	**8%**	**41%**	**43%**	**9%**
2018	3%	31%	37%	24%	5%

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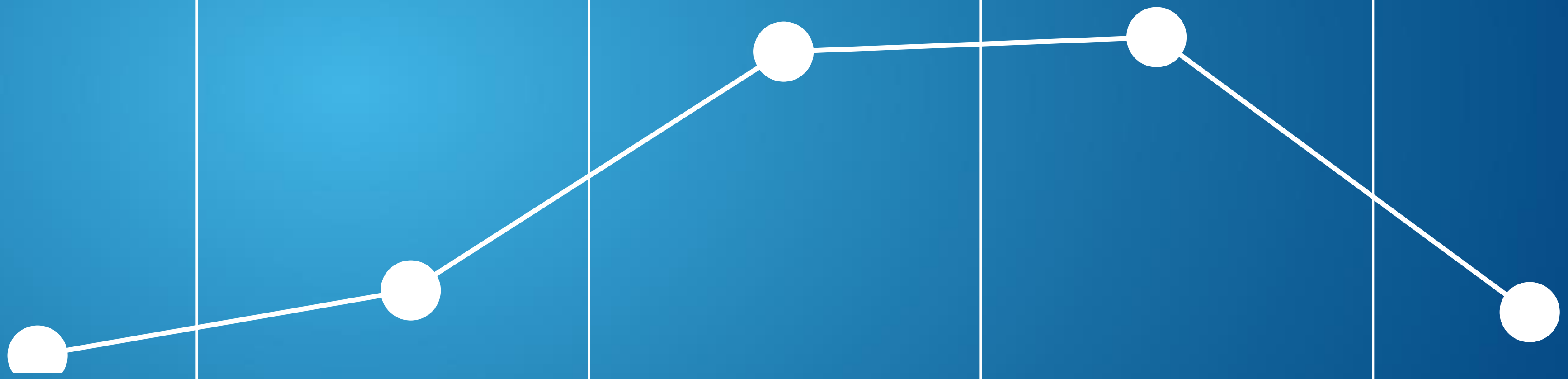
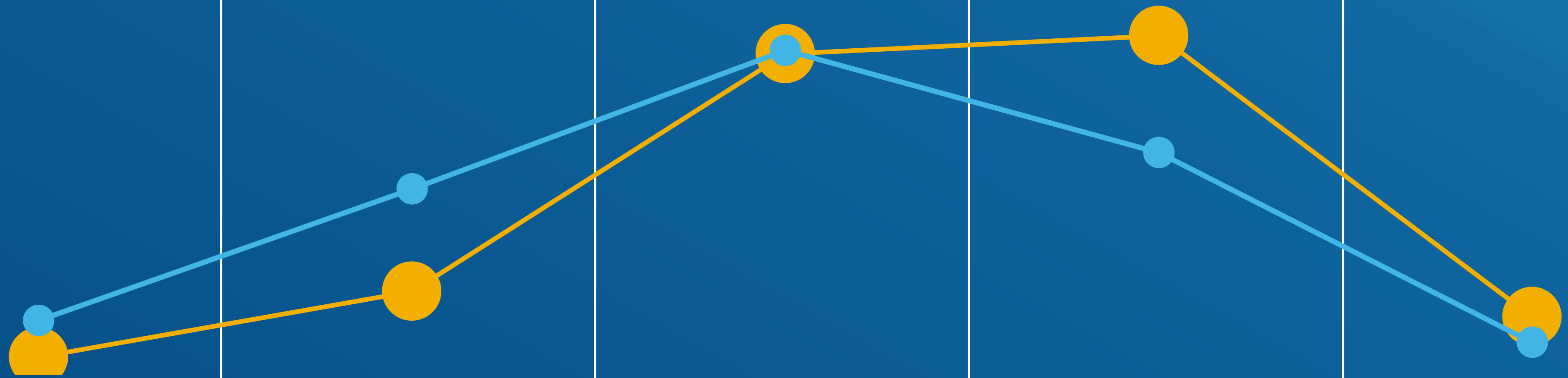
Digital Transformation Index 2020 – Spain

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
0%	9%	42%	44%	6%



Digital Transformation Index Over the Years
Spain

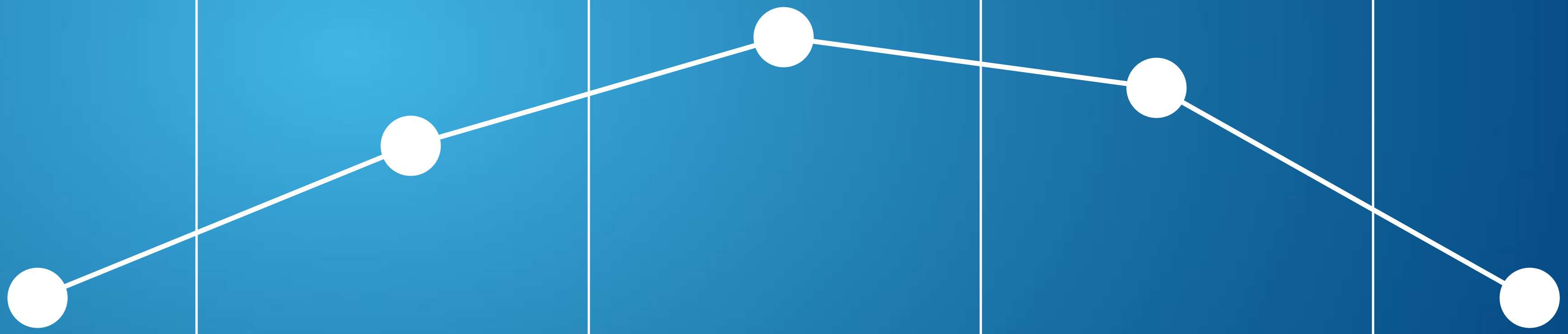
Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business



	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**0%**	**9%**	**42%**	**44%**	**6%**
2018	5%	23%	42%	28%	2%

Digital Transformation Index 2020 – Sweden

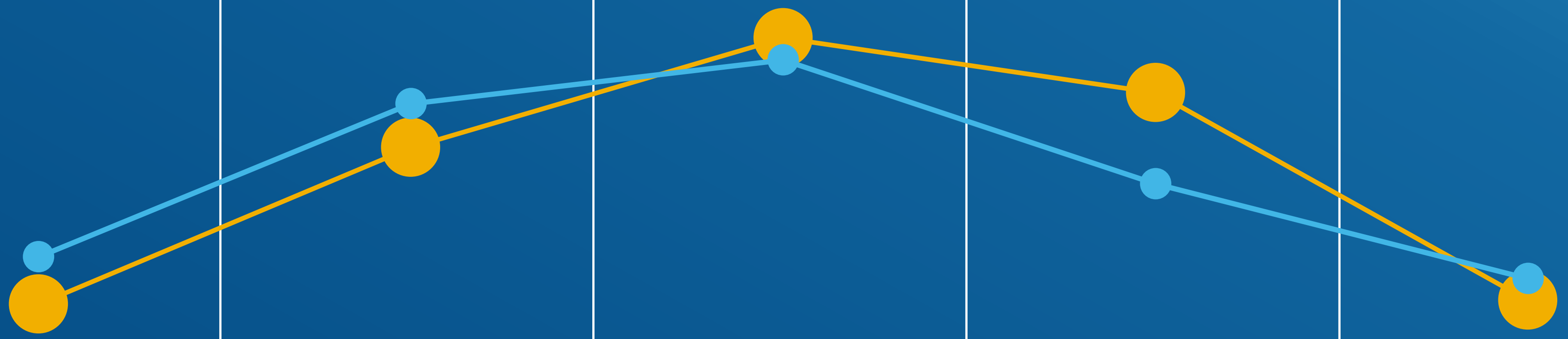
Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
3%	24%	39%	32%	3%



DELL Technologies

Digital Transformation Index Over the Years
Sweden

	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
	Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business



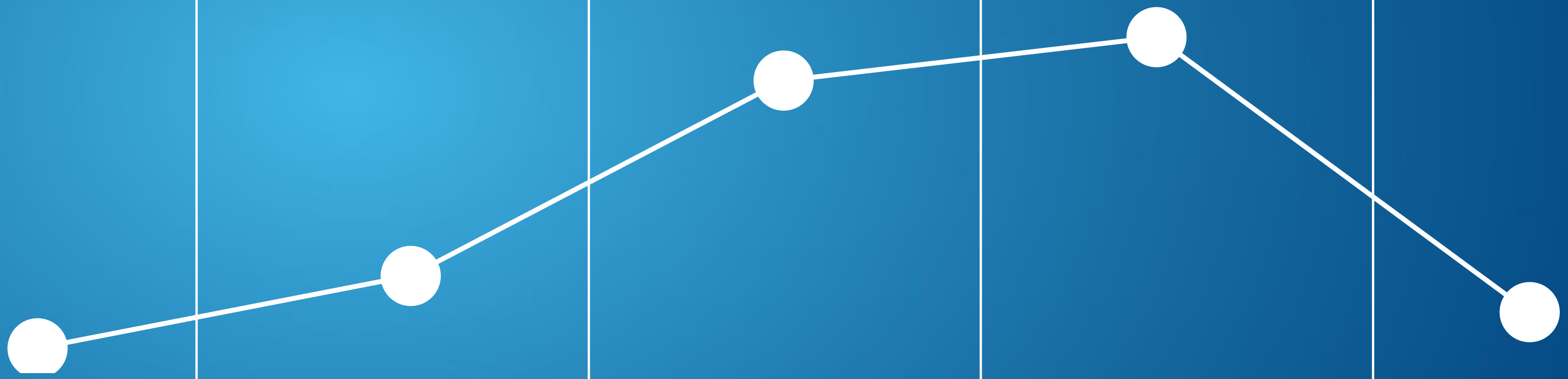
	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**3%**	**24%**	**39%**	**32%**	**3%**
2018	9%	30%	36%	19%	6%

DELL Technologies

Americas

Digital Transformation Index 2020 – Americas

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
1%	11%	38%	44%	6%



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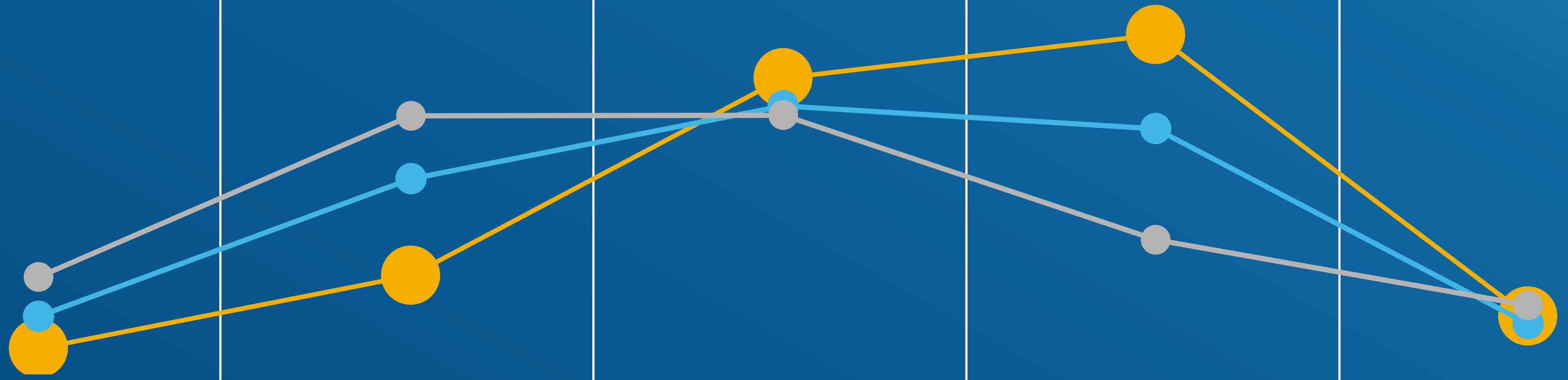
Digital Transformation Index Over the Years
Americas

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business



	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**1%**	**11%**	**38%**	**44%**	**6%**
2018	6%	24%	34%	31%	5%
2016	11%	34%	33%	16%	7%

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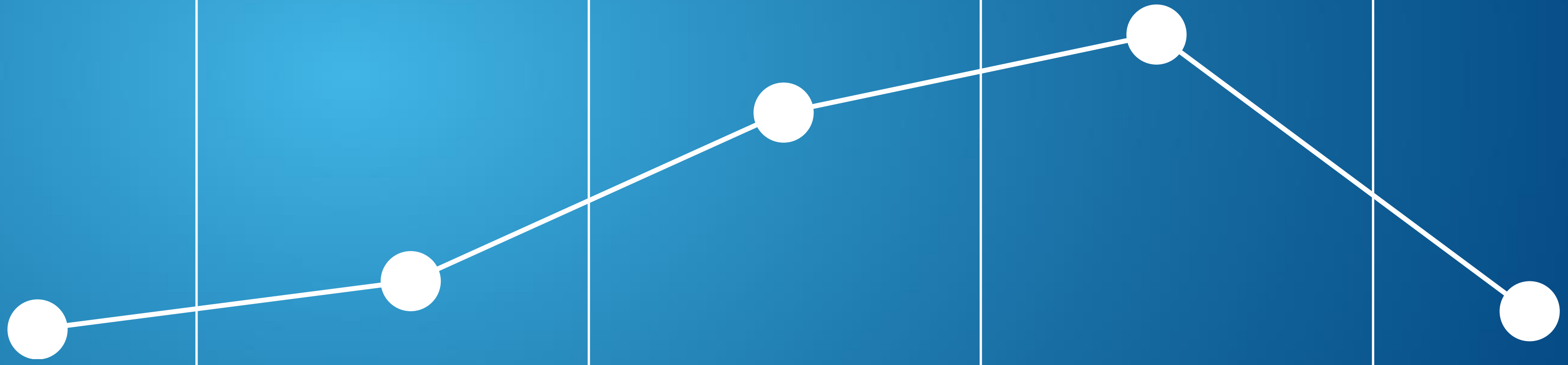
Digital Transformation Index 2020 – Brazil

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
1%	9%	37%	50%	4%



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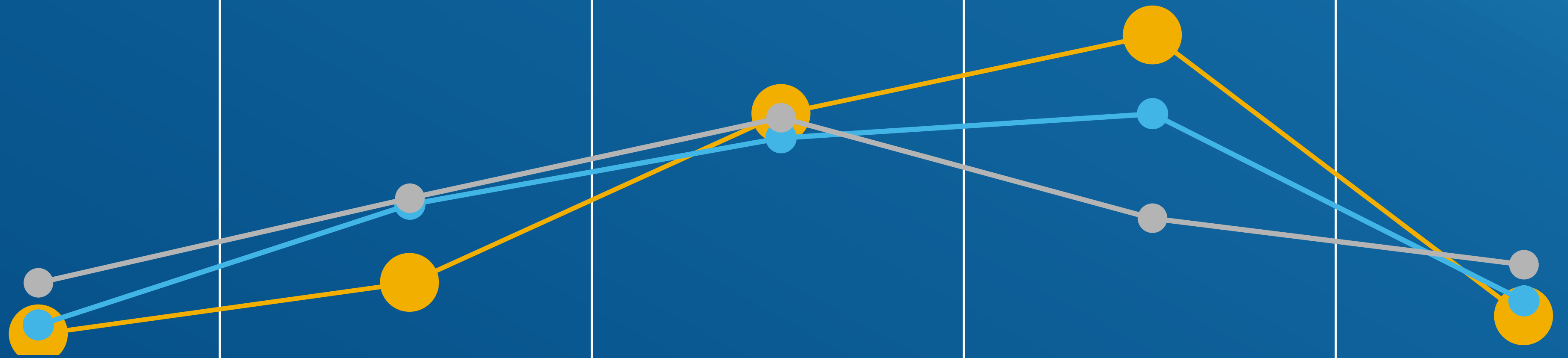
Digital Transformation Index Over the Years
Brazil

- **Digital Laggards**: Do not have a digital plan; limited initiatives and investments in place
- **Digital Followers**: Very few digital investments; tentatively planning for the future
- **Digital Evaluators**: Gradually embracing digital transformation and planning for the future
- **Digital Adopters**: Have a mature digital plan, investments and innovations in place
- **Digital Leaders**: Digital transformation is ingrained in the DNA of the business



	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**1%**	**9%**	**37%**	**50%**	**4%**
2018	2%	22%	33%	37%	6%
2016	9%	23%	36%	20%	12%

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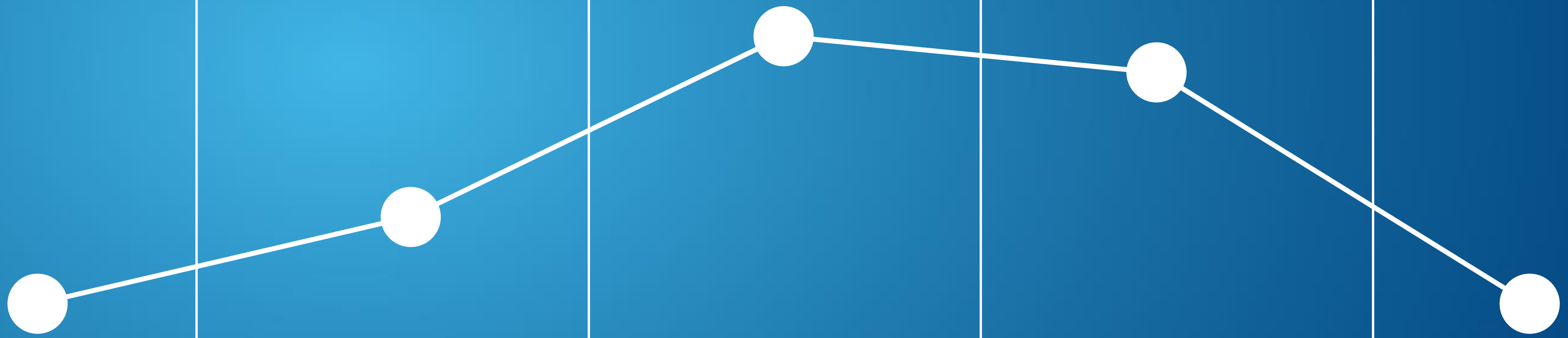
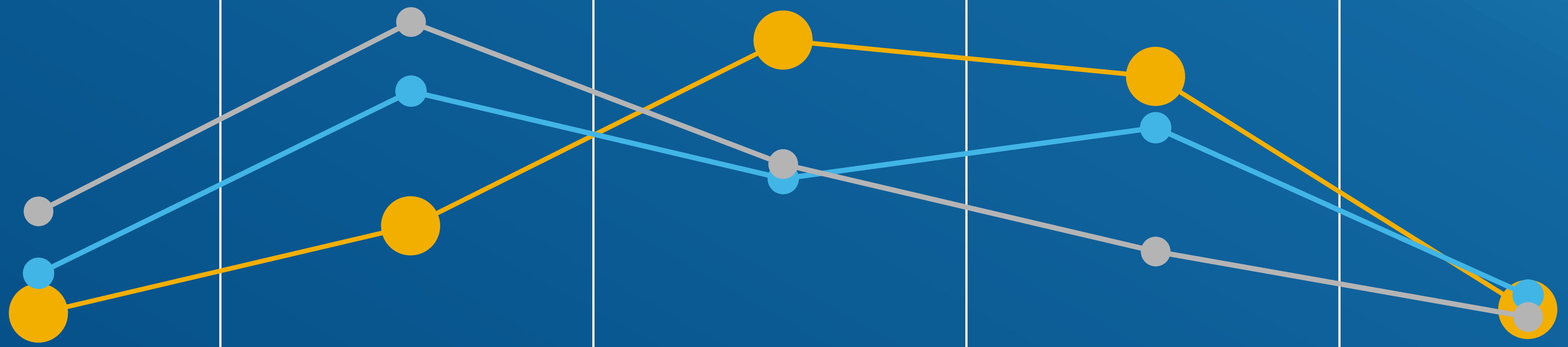
Digital Transformation Index 2020 – Canada

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
4%	16%	41%	36%	4%



Digital Transformation Index Over the Years
Canada

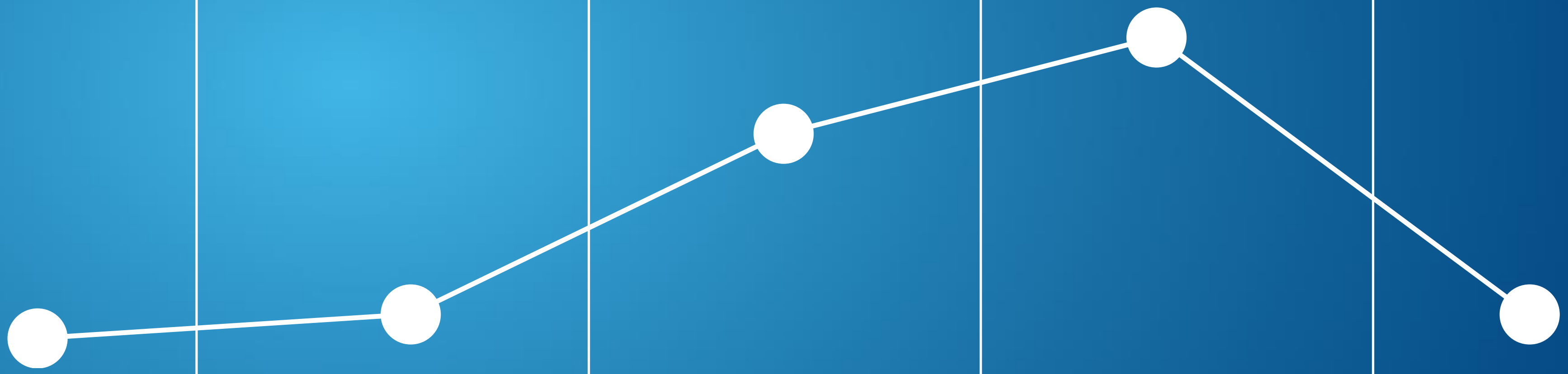
Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business



	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**4%**	**16%**	**41%**	**36%**	**4%**
2018	9%	34%	22%	29%	6%
2016	18%	45%	24%	12%	3%

Digital Transformation Index 2020 – Mexico

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**
2%	6%	36%	52%	6%



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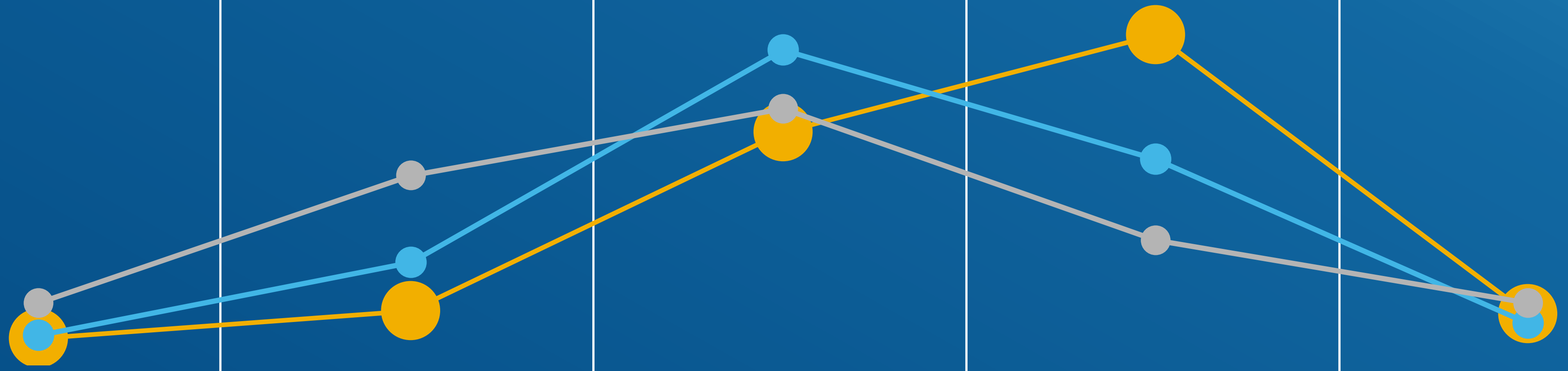
Digital Transformation Index Over the Years
Mexico

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	Very few digital investments; tentatively planning for the future	Gradually embracing digital transformation and planning for the future	Have a mature digital plan, investments and innovations in place	Digital transformation is ingrained in the DNA of the business



	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**2%**	**6%**	**36%**	**52%**	**6%**
2018	2%	14%	49%	31%	4%
2016	7%	28%	39%	18%	7%

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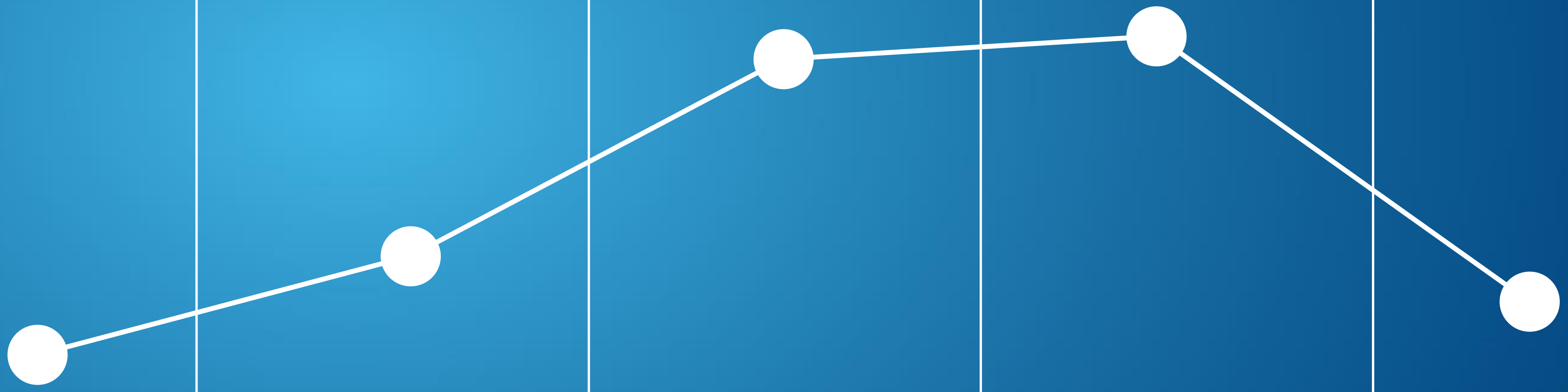
Digital Transformation Index 2020 – USA

Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
Do not have a digital plan; limited initiatives and investments in place	**Very few digital investments; tentatively planning for the future**	**Gradually embracing digital transformation and planning for the future**	**Have a mature digital plan, investments and innovations in place**	**Digital transformation is ingrained in the DNA of the business**



0%	13%	39%	42%	7%

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Digital Transformation Index Over the Years
USA

Digital Laggards
Do not have a digital plan; limited initiatives and investments in place

Digital Followers
Very few digital investments; tentatively planning for the future

Digital Evaluators
Gradually embracing digital transformation and planning for the future

Digital Adopters
Have a mature digital plan, investments and innovations in place

Digital Leaders
Digital transformation is ingrained in the DNA of the business

	Digital Laggards	Digital Followers	Digital Evaluators	Digital Adopters	Digital Leaders
2020	**0%**	**13%**	**39%**	**42%**	**7%**
2018	8%	24%	25%	38%	6%
2016	12%	41%	30%	13%	4%

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