Michael Dell (01:55):

Thank you very much. Good morning and welcome to Dell Technologies World.

(02:05):

We are thrilled to bring you some of the leading voices in technology today. You'll also hear stories about customers who are just like you, putting their data to work, providing AI services to their customers, and reaping the rewards. We want to inspire you to reimagine your organization for artificial intelligence and we want to encourage you to act fast. Now, for many of you, the question is as basic as where and when to start. Our answer is pretty simple here and now. We have built Dell Technologies to be your trusted partner and although this moment feels like a new beginning, it's really just the next step forward in a journey that we've been on together for a very long time. Earlier this month, Dell celebrated our 40th birthday. Thank you. Thank you.

(03:13):

40 years since I was building PCs in my dorm room at UT, I could never have predicted how far we'd come our global reach and scale, the breadth and depth of our solutions and our incredible team members, customers, and partners. Above all, what humbles and inspires me the most is the downstream impact that Dell has had over decades. How all of you have put our innovation and solutions to work. Together, we put more power in the hands of more people around the world and it's been like an age of miracles from the growth and global prosperity to the dramatic increases in public health, welfare and education. From the discovery of far away galaxies to the blueprint of life itself. From subatomic particles to the darkest depths of the seas, human progress has advanced by orders of magnitude across every domain. I thank you. It's been one hell of a ride.

(04:30):

All that work and investment, the dramatic scale out of computing power and storage and connectivity, automation and intelligence, the instrumentation of the physical world that combined innovation is the foundation for this moment. All of that progress that came before was really just a pregame show and we're moving from computation towards cognition into the age of AI. How far and how fast we'll go is no clearer to me now than it was 40 years ago when that 19-year-old kid launched a PC company. But I'm more excited and more confident than ever in the opportunity than I've been at any time in my life. We are unleashing technology that will accelerate scientific discovery and development with the power to transform our organizations, our lives and our world. Now to understand where we are, it may be helpful to look back. Let's go way back. The earliest factories were mills, water or wind turned the wheel and the wheel did the work. Anything that you wanted to automate had to attach to the wheel. And then when electricity came along, what did they do? They used electricity to turn the wheel. It took years before we ran electricity through the building and automated way more tasks with smaller purpose-built machines that plugged into the wall and that's kind of where we are right now with AI. So my advice, don't use AI to turn the wheel reimagine and reinvent your organization to harness this hyper intelligence. It's a generational opportunity for productivity, innovation, and growth.

(06:42):

I spoke about all the work that's gone into this moment and that work includes partners and friends who've been by our side the whole way and we're now leading in bringing this AI opportunity to the enterprise. It's my pleasure to introduce a fantastic partner and my friend Bill McDermott, chairman and CEO of ServiceNow.

Bill McDermott (07:21):

How y'all doing out there? Hey, their in Las Vegas. How y'all doing out there? Alright, let's go

Michael Dell ([07:25](#)):

Bill, thank you so much for being here. It's great to see you. We've kind of been at this a long time now haven't we?

Bill McDermott ([07:33](#)):

We have, when I see you and I think about that 40 year anniversary, some men see things as they are and say why you dreamed things that never were and said, why not? At 19 years old with a thousand bucks, you change the world. Congratulations, Michael Dell, congratulations Michael Dell.

Michael Dell ([07:55](#)):

Thank you. Thank you. So tell us a little bit about what ServiceNow is up to and how you're thinking about this AI opportunity.

Bill McDermott ([08:07](#)):

I'd love to Michael. ServiceNow is an idea and just like Michael Dell had his dream for Dell, I have my dream for ServiceNow and that is to make sure it becomes the defining enterprise software company of the 21st century or as my friend Jensen would say, the AI operating system for the enterprise. And so now I think we'll find ourselves in a very unique situation. The world is capitalized on the industrial revolution and Moore's law and now we're into the AI revolution powered by an unprecedented magnification of scale laws that are driving unbelievable GPU acceleration. And for me, every workflow in every enterprise, in every industry, in every corner of the world will be reinvented with gen AI and that's why I believe that this business transformation is of a generational magnitude and just think about this, 11 trillion in GDP impact will be felt by the global economy in the next three years alone. So this is really big, really big and it's moving really fast. And I must say something really off the cuff here, I was here about 10 days ago on this stage with our company and I was also joined by Jensen then and one of the things that he said, and I think it's appropriate is when a train is moving by really fast, it's like you can't even believe how quick it looks, but when you get on the train, it doesn't seem like it's moving that fast at all. Think about it.

Michael Dell ([10:02](#)):

Time to get on the train.

Bill McDermott ([10:03](#)):

Time to get on it.

Michael Dell ([10:04](#)):

So we've had a great partnership, Bill, you and I both at ServiceNow and for a long time. Great track record of innovating together and once again, you're at the forefront of this conversation now with AI. How are you preparing for what's to come and how do you see this sort of playing out over the next few years?

Bill McDermott ([10:28](#)):

Sure. Well, I believe that every company has to become an intelligence company in the era of AI. And all industries are going to be entirely reinvented and speed will end up being the ultimate competitive advantage. And I call this artificial capable intelligence because it has to drive a new chapter in the experience economy. So just think about gen AI driving natural conversation and at the same time massive calculations that solve business problems that tech couldn't solve before. So I think this artificial capable intelligence is leading us to a new era, a new era where employees are going to get an entirely different experience where customers are going to expect that everything will be digitized, that their experience in any channel will be automatic and that the innovators of course are going to have a human-like interface to text with natural language and automatically have software code invented for them.

(11:42):

This is already driving 50% productivity improvements. But just think about companies like Aston Martin, Aramco, you spent a lot of time looking at various markets around the world. Aston Martin Aramco does one 10th of a second transforms their company because if they miss on the track by one 10th of a second they lose the race. I'm working with the largest retailer in Europe, the Schwartz group. There're in many, many businesses, but what they are doing is reimagining the whole retail experience. Before you get there, when you're in store, how they know what you want before you get there, how they demand plan for what you want, the experience that you get in the store. And just think about this, okay, if you have one bad experience with a customer in a retail establishment, they are one third less likely to ever do business with your company again. So there's a precision to this, there's a sustainability effect to this and there's a speed effect to this and we just can't make any mistakes. So what are we doing? I'll sum up for you. It's a mess out there ladies and gentlemen. The enterprise is a mess. When you have people swivel cheering among 17 applications a day, no wonder why they don't want to come back to the office.

(13:21):

Okay? What we do is we put a clean pane of glass on the mess. We become the AI platform for business transformation. What does that enable you to do? It enables you to access all the repositories, all the systems. It lets you apply intelligence to those systems and it automates for you the next best action. You see, transforming knowledge into business outcomes requires really two main things. What do you know? And then what do you do with what you know? And that's where we come in. We're on a quest for exponential leadership based on knowledge. And this AI revolution is not about incrementality, it's not about year over year, probably we can improve by 10%. This is about exponential thinking, a complete breakthrough take cost out, improve productivity, and absolutely empower your people. They don't want to do spreadsheets and emails and texts all day to get around these systems. They want a human revolution where their own spirit can become the next great generation where they can lead the enterprise and lead business and have an unbelievable future. That's what they want.

Michael Dell (14:50):

Thank you Bill. I couldn't agree more. Very well said. You've been a leader in the use and expansion of AI in the enterprise and we're super proud to be a partner of yours in ServiceNow in this incredible journey. Talk a little bit about what you've been bringing to market for your customers and also some of the ways that we've been partnered together and Dell's been helping you along that journey.

Bill McDermott (15:19):

First of all, trust is the ultimate human currency and I can think of no person I trust more than Michael Dell and I can think of no better company than Dell Technologies. Okay, that's how we roll and that's in the bottom of my heart and he knows that. So I think we're talking backstage about this revolution that's going on and I think what Dell and ServiceNow do uniquely is we help each other, we help each other help you so we know more about you, we can care more about you and we can do more for you. And that's the essence of the partnership. But I also want to say this, ServiceNow is not just the fastest growing enterprise software company in the world because of our great software. It's also because our cloud runs 24 by seven as the reliability gold standard in the enterprise on Dell, and that's a fact.

(16:24):

And so that compute platform powering our cloud has enabled us to execute beautifully and maintain a near 99% retention rate, which is unheard of. I would also like to say that Dell makes now AI more intelligent because we use Dell servers to train our large language models and we're putting AI to work for people, which is really what it's all about now is live with gen AI solutions on Dell compute and 48% acceleration to innovate two times greater deflection rates on both the employee experience and the customer experience with conversational self-service. This is enabling people to do things they never dreamed of before. I always laugh, they always say, oh, probably will this cost people jobs. In 1966, time Magazine said the same thing, oh, will the computer cost people jobs? They came up with a theory that 90% of the executives would still have jobs but 90% of the people wouldn't.

(17:37):

So the government would have to subsidize the people on a welfare state. This is how wild it gets. So that's 90 million jobs ago. So I always hear, will this take the job away from the call center agents as an example, they turn over 35% a year, give them a break, maybe they'd like to stay and enjoy the work. So that's why we believe that the 1 million business processes, the 40 billion workflows and the 4 trillion LED transactions driving a billion hours of productivity on the ServiceNow platform with Dell is kind of a big deal. And we also believe that that will increase 10 x in the next five years. So Michael, we collaborate because we believe in you and your company and we believe that together we can give the customers our very best and it's truly an honor to team up with you.

Michael Dell (18:37):

Thank you Bill. It's a great partnership. Thanks for your innovation. Thanks for your inspiration.

Bill McDermott (18:41):

Thank you brother. Thank you for being here.

Michael Dell (18:42):

The best. The best. Thank you. Ladies and gentlemen, bill McDermott. Leaders like Bill McDermott and companies like ServiceNow are making the investments today so that their customers can innovate in the future. Building AI services for their own AI factory running on Dell. That makes a lot of sense and what we've learned over time is that you don't want to bring all your data to a public centralized cloud of services. You get locked in and as your data grows, you want to put it to work, it gets harder and it gets more expensive. According to your recent studies, inferencing for large language models can be 75% more cost effective on-prem versus a public cloud. And 83% of enterprise CIOs plan to repatriate some of their workloads from the public cloud in 2024. This is driven by two things, inference and data gravity.

(19:57):

You want to bring AI to your data, not the other way around. Hosted on accelerated optimized AI infrastructure, Dell Technologies and our amazing ecosystem of partners, well that's what we do. We build AI factories for you with your data performance services, costs and security under your control. It's your data center for the future. Built and designed from the ground up with an AI first mindset. Data has been and is at the center of everything. It's the rocket fuel, so let's go where the data is and no company in the world has provided more storage capacity than Dell. We are the storage leader and we're pulling away. Let's start with structured data. Data from mission critical applications like databases provides important context about your company and PowerStore is the adaptable intelligent architecture you need and I'm especially excited about today's announcement of PowerStore Prime. Built on four years of market momentum PowerStore has become the largest and fastest growing storage product in the industry. With tens of thousands of customers served around the world and PowerStore Prime combines a massive update of advanced all-flash technology with new customer and partner benefits with up to 66% more performance, the most flexible QLC array on the market and world-class efficiency with a five to one data reduction guarantee. The industry's best.

(21:57):

Cloud mobility and secure snapshots with storage direct integration to our leading data protection portfolio. Another place where Dell is number one. And the best part, if you're already one of the more than 10,000 power store customers, many of these features are available at no cost with a non-disruptive software upgrade, you're going to hear much more about this and many other new exciting innovations in tomorrow's session, including Arthur's section. So from structured data, let's go to unstructured data and the massive data sets that are used to train your foundational models. The new PowerScale F910 delivers a significant boost in streaming, read and write performance. It accelerates all phases of the AI pipeline with high speed data ingest at scale, it brings AI to your data wherever it lives. With flexible public cloud integration, embedded federal grade security and exceptional efficiency, the F910 is designed to feed the beast of accelerated computing. GPUs just devour storage and data at unprecedented rates much, much more than CPUs and I've never seen so much innovation in silicon happening so quickly With more choice, more capability and lower cost of ownership coming online even as we speak. Now at the heart of your AI factory is the Dell PowerEdge XE9680 with eight GPUs in a single node, four terabytes per second of GPU throughput and 50% more GPU direct storage access during data ingested writing the highest in the industry.

(24:04):

Thank you. The XE9680 makes generative AI more accessible for more organizations to train larger models, reducing data center footprints, lowering TCO and gaining competitive advantage. And we're connecting it all with lightning fast networks. Dell has partnered with Broadcom and with Nvidia to offer AI fabrics that can handle the massive volumes and throughput density required for these intense AI workloads. And one of the plots of these systems is to connect them all together with super fast networks. Cognitive routing increases the number and reliability of return paths of workloads resulting in more efficient workloads solutions. But of course not all the models are large and not all AI workloads run in a data center. When it comes to data centers. Think about training model storage and hosting. It's higher cost, it's power intensive, it's higher latency and it's running on a rack of AI enabled servers, but it's at the edge where the vast amount of data lives and where the vast amount of AI workloads eventually are going to run. When it comes to the edge, think inferencing, personalization and AI assistance, it's inexpensive, it's energy efficient, it's fast, and it's running on devices and it's everywhere. Our PCs are an essential part, Our PCs are an essential part of the compute engine for inferencing at the edge as well as driving workforce productivity. Just today Microsoft is announcing the Copilot Plus PC, a new class of device that brings the intelligence of AI to wherever you are. And here at Dell Technologies

world, we are announcing five new AI PCs with Copilot Plus. These new Copilot Plus PCs are powered by the latest Qualcomm Snapdragon X Series processors with more models and options coming later this year.

(26:39):

Yes, we are using an advanced architecture with a CPU, a GPU and an NPU to manage complex workloads, sending the right task to the right engine. The speed and efficiency of these systems are unmatched with all day battery life and this braking performance makes tasks easier and workflows run much smoother and we're integrating it all into the broadest open ecosystem with silicon from Nvidia, Intel, AMD, Qualcomm and more and services with ServiceNow, Azure, Databricks, Snowflake, IBM, and many more, as well as open source models like Hugging Face and Meta's Lama 3 and many more. You'll hear more about it tomorrow. Our ecosystem is bursting with innovation and through our professional services we help you get started from training to implementation and inference. This includes retrieval, augmented generation and generative AI jumpstart with our precision workstations. Dell technology is delivering a comprehensive set of AI solutions all in one place and customers are already benefiting. One of those customers is Samsung SDS. It's at the heart of Samsung's global technology and innovation agenda and they are investing now to deliver AI services for the entire Samsung group and beyond. It is my distinct pleasure to welcome to the Dell Technologies world stage, Dr. Sungwoo Hwang CEO of Samsung SDS.

(28:39):

Good morning and welcome to the Dell Technologies World stage. So great to have you here.

Dr. Sungwoo Hwang (28:45):

It's my pleasure, Michael. So great to be joining you, your customers and partners to talk about what we are doing at Samsung SDS.

Michael Dell (28:55):

Fantastic. So a lot of exciting things are happening with how Samsung SDS is using AI. Could you tell us a little bit about what you're doing and what you aim to deliver to your customers?

Dr. Sungwoo Hwang (29:08):

Sure. Samsung SDS is a company that provide IT and Cloud services to corporate customers. Our goal is to ensure that company's work is done most efficiently and safely through our services. So we provide managed service that combine SaaS and legacy based on Samsung Cloud platform tuned for efficient and safe business operations. You know what processes in manufacturing sites are standardized and they can be automated to a large extent by rules. However, human language is dominant in offices and it has been difficult to automate office works by similar rule-based methods. Since large language model can understand human language and its intention well it'll be of great help for office automation. We call this Hyper Automation. Samsung SDS has been working very hard to find a way to automate our own solutions and services by language and this year we successfully launched Brity Copilot and FabriX. Brity Copilot is on-prem, Copiloted mail messenger meeting drive services. FabriX is a pass that helps app suite language interfaces easily go up on the cloud.

Michael Dell (30:35):

And you invested in your own AI models and you've done this on-prem to make this happen. Can you tell us why you chose an on-prem solution?

Dr. Sungwoo Hwang (30:48):

Yeah, our enterprise customers are very interested in doing hyper automation using LLM, but they are worried about the security because they have to put their proprietary information into LLM have LLM referred to their core company's core data. Therefore it became very important to provide enterprises larger length tomorrow built on site.

Michael Dell (31:18):

Yeah, you want to protect that valuable Samsung intellectual property. So can you share some insights on what influenced you to partner with Dell and how our support has contributed to your success?

Dr. Sungwoo Hwang (31:33):

Yeah. Last year when there was a shortage of GPU servers, Michael, there was a big savior to me. I couldn't even come here today without his help.

Michael Dell (31:44):

We became good friends.

Dr. Sungwoo Hwang (31:53):

Thanks to you Michael. We are already providing gen AI services to our customer companies. Number of users exceed hundred thousand already. When enterprise users prompt LLM, they cannot bear long response times, but enterprises don't want to pay a lot of money even for best solution. We put a lot of technical effort into how to serve users quickly and inexpensively and their power to servers have played a big role in that. In addition, their AI factory launched based on NVIDIA partnership is expected to contribute to the establishment of data sovereignty for companies by enabling strong data security and customized AI service development. Samsung aims to continue creating customer value by providing more copilot services based on strong partnership with our trusted partner, Dell.

Michael Dell (32:59):

Well, it's been an honor to support you. What do you see as next in terms of this technology and what you're going to be able to do for your customers with all this power?

Dr. Sungwoo Hwang (33:11):

In the future, I think all the computer will be designed in a way to easily upload and run solutions and applications with language interfaces, perhaps era of GPU centric computer will come. Samsung SDS want to be the first before anyone else to change our own computing platform so that our customers can receive easy and affordable IT services with language interfaces. I hope Dell will be the most important partner in this interesting journey together with us.

Michael Dell (33:51):

Awesome. We look forward to that. Thank you so much for being here. Thank you for sharing your story with us. Thank you.

Dr. Sungwoo Hwang (33:56):

Thank you

Michael Dell (33:59):

Dr. Hwang from Samsung SDS. They're doing amazing work and to see the outcomes of that effort inside their organization, that's what we live for and Dell Technologies was really built for this moment. Our comprehensive solutions backed by our powerful and advanced and resilient supply chain wrapped in global sales supported services. Our team members around the world, united by a culture of innovation, customer focus, integrity, and they always get the work done that has fueled our organization through decades of reinvention. And we have all of you, our customers, our partners, these relationships, your incredible achievements, your collective genius, your passion, your creativity and your inspiration. Those power all of our work every single day we're listening to you. We call it having big ears and we're reinventing ourselves once again to be a better partner for all of you. We're focusing our own generative AI initiatives on the things that you care about most, engineering, product quality, support and services, security and supply chain.

(35:23):

We are getting faster, stronger, smarter to be by your side for what will be both a sprint and a marathon. In my conversations with all of you across industries, public and private sector, from IT professionals all the way to the most senior levels of government and commerce. The uptake and demand for AI is unprecedented. It will touch every industry in every organization, but each industry and each organization will have its own specific requirements and needs. Large language models are fantastic for language-based data and language-based tasks like coding, customer support, translation, content creation and management. If you have engineers and a call center and you're not using an LLM based assistant, you're already behind. But large language models don't create value on the factory floor. For those you need vision models, omniverse models and real world models, other models will tackle other problems and we're still in the early stages of model training and throughout our ecosystem there is amazing innovation taking place, domain specific models, integrated reasoning systems, referencing techniques to improve accuracy and of course Multimodal AI, the rate of innovation is amazing and it's accelerating.

(37:02):

Look, every week I'm blown away by the progress of open and close, large and small models by the exploding set of enterprise use cases for inference and for assistance. We're seeing small models that are incredibly capable, that are faster at inferencing and more efficient and lower cost. Soon personal devices will be running personalized models and will be going from AI assistance to coworkers and digital agents. The AI wave is massive and demand for tokens which are effectively human intelligence is really far bigger than we understand. In 2023, there were 10 trillion tokens created and that's expected to grow to one quadrillion tokens. By 2028, that's a hundred x increase. Eventually the application of AI will be as broad as the internet and that's how it'll be. It'll be ubiquitous like the internet, like electricity. And I get asked all the time, so how big is this AI thing?

(38:13):

Really? Like there's some super secret answer that only I know. Sorry, I don't know. Sure, there are a lot of estimates out there, but I don't think anybody really knows the answer to this question. What is the demand for intelligence? Is there a limit to the demand for intelligence? What is the appropriate investment in infrastructure to meet this potentially limitless demand? I can tell you this, the early movers are making massive bets and as my good friend Jensen Huang likes to say, we are at the beginning of a new industrial revolution. But rather than hear it from me, let's hear it from the man himself. Please welcome to the Dell Technologies World stage. My good friend, CEO and founder of Nvidia, Jensen Huang.

Jensen Huang (39:15):

Hey everybody.

Michael Dell (39:18):

Jensen,

Jensen Huang (39:19):

Welcome to Dell World. Like I say, it's Dell's world.

Michael Dell (39:26):

Thank you Jensen. Thanks so much for being here. Just a couple months ago we were at GTC together. What an awesome event that was.

Jensen Huang (39:33):

You took over the show, so Michael shows up and the whole time the camera was on him.

Michael Dell (39:42):

I think you told him to put the camera on me. Had nothing to do with that, but it was a lot of fun. It was a great show. It was incredible. And the innovations that Nvidia is striving for the industry are fantastic and we've been at this a long time. We were talking backstage about the NV1 and the G4256 back in the previous century.

Jensen Huang (40:07):

Nvidia inside the Dell dimension, the back cover of PC Meg. It was incredible.

Michael Dell (40:14):

Absolutely. So you've talked about how AI is kicking off this new industrial revolution. I would love to hear your thoughts on that.

Jensen Huang (40:24):

Well, over the course of the last 12, 14 years, we've now managed some really giant breakthroughs in computing and the first part of it was the transformer, of course allowed us to scale the learning of almost any information. This is the big idea. The big idea of AI is that irrespective of what the source of the information is, whether it's text or audio or video or sequences of proteins and amino acids, we could learn the meaning of that information from the data. The second breakthrough, which happened a couple of years ago was not only can we learn the meaning of it, but because we've learned multimodality, we can translate from one modality to another and even generate. So not only can we translate information, understand the meaning of it, but we can also generate text to image. For example, generate properties of a protein to maybe a virus, a vaccine for a virus, so so on and so forth.

(41:31):

We now have the ability to generate information. You mentioned earlier tokens. If you take a step back, what has happened is instead of just producing software, we're now producing intelligence. That intelligence is formulated in the form of tokens that could be then expressed in any information modality that we'd like it to be. And so very first time in history, we now have the ability to manufacture

intelligence. The last industrial revolution was the manufacturing of software. Previous it was manufacturing of electricity. Now we are manufacturing intelligence. This industry is incredible and so the opportunity for us is several folds immediately in our world. You've got a trillion dollars worth of data centers in the world that was created for the last generation of IT that's going to be completely modernized to this new form. The second on top of that, which is really the exciting part in some of the things that you and I have been talking about, is a whole new class of data centers that's designed for just one purpose.

(42:42):

The purpose of manufacturing intelligence at scale, we call it AI factories. The ability for these large infrastructures that has completely reinvented computing as we know it. Data comes into this factory and what comes out of it are tokens. And these tokens are being manufactured and that could be used in all kinds of different applications. Everything about computing since the time you and I first met has been reinvented from CPU, General Purpose Computing to GPU, accelerated computing from instruction driven programming and computing to now intention driven. Just let the computer know what you intend from retrieval based prerecorded content, essentially retrieval based data centers to now generative AI factories, every aspect of computing is being changed.

Michael Dell (43:44):

And what does it take for enterprises to sort of transform into this creating intelligence and generative AI businesses themselves?

Jensen Huang (43:55):

Well, the exciting part is that every company at its foundation is intelligence. Fundamentally, every company is an intelligence manufacturer, and if you were an intelligence, a biological intelligence manufacturer of the past in the future, you're going to want to augment that with digital intelligence. And so it's sensible that every company is going to become a tech company. Every company will become an AI company. Every company will be an intelligence manufacturing company. So that's sensible. The question is how now we know that just as I was talking about earlier, that the entire computing stack has now been changed, everything about it. Instead of human engineered applications and programs that are written by people, we're now going to have the same people now cobbling together, assembling AI teams, if you will. And these AI teams are built out of large language models. And so business applications in the future will have large language models, API calls, and these large language models integrated all over it, helping us solve problems to run that on-prem. You can run that in cloud of course, but in order to run that on-prem, you're going to have to essentially build state-of-the-art AI factories. And this is the giant new thing that we're doing together. This partnership between us is going to be the first and the largest generative AI go to market in history. We've put together everything. Yep, go ahead.

(45:29):

This is a giant deal. Only Dell. Only Dell has the ability to build, compute, networking, storage, integrate it with incredible software, whether you like it to be air cooled, liquid cooled, bring it to your company, help you stand it up with professional services and with your IT department, develop new applications that you can deploy. And so this partnership between us is really about that. Literally from the ground up, building AI factories and delivering it to the world's enterprise as a solution.

Michael Dell (46:04):

And you can build those NIMS on your new AI PCs and send 'em over to your AI factory. So let's talk about this new Dell AI factory built on Nvidia. This accelerated computing platform is important. You got to have it to harness the power of generative AI as you just talked about. And the pace of innovation is pretty amazing. It was just a couple months ago we were GTC, we were talking about it. We've got seven new announcements today on the Dell AI factory with Nvidia. It's the speed of advancement is pretty amazing. It's built on our decades of collaboration and we're making it easy for customers. We've sort of created the easy button for AI for enterprise customers, from the data center to the PC, Accelerated Systems, Software Services and solutions. And we've had a ton of success with the XE9680 with Hopper. And now we are super excited to bring the XE9680 L with direct liquid cooling. So it goes from a six U to a four U form factor. So we can put 72 of your B 200 blackwells in one rack. It's an amazing density.

Jensen Huang (47:36):

Only at Dell World do you talk sexy like that.

Michael Dell (47:42):

There's more tomorrow. This is just a warmup. This is so again,

Jensen Huang (47:49):

Don't sed seduce me with talk like that. That gets me super excited. 72 Blackwells in a rack. I love that.

Michael Dell (48:10):

So more to come. More to come.

Jensen Huang (48:13):

I hope so.

(48:15):

Well, the thing that's really incredible here, Michael, is that when we first met, this is some 20, almost 28 years ago, Dell made PC one click easy and you can configure your own pc, build it however you like. You made it easy to buy and sell. And now we're going to take this to a whole new level. I mean, these systems are incredible. These are giant supercomputers that we are going to build at scale, deliver at scale, and help you stand it up at scale. And so what appears to be incredibly complicated technology and it's very complicated technology, but we're going to make it easy for all of you guys to be able to enjoy it. The accelerated computing part of it, the GPU part of it, you have liquid cooled or air cooled, you have X86 or grace based. The networking stack is completely new because AI for networking.

(49:13):

Networking for AI is fundamentally different than AI for hyperscale and AI for enterprise. The distributed computing workloads puts a lot of burden on the east west traffic. All of the processors have to work together. The entire software stack is completely rewritten. And so everything from the operating system to the APIs that sits on top to the applications that people write, and these amazing AIs that we're going to put together into essentially a container we call NIMS, are going to be easy for you to deploy. So everything about the whole thing is going to be easy.

Michael Dell (49:47):

Awesome. So we had some great examples today with some other customers, Jensen, we've been at this for 30 years, but it does feel like it's just the beginning of tapping into all the intelligence in the world and accelerating scientific advancement, discovery, and just launching humanity into a new phase of opportunity and potential.

Jensen Huang (50:10):
We have two things we have to do.

Michael Dell (50:11):
Alright, give it to me.

Jensen Huang (50:14):
We have to go modernize a trillion dollars of the world's data centers. That's one check. Second, we have to build these AI factories for the rest of the a hundred trillion dollar industries. So that's easy peasy. We could do it.

Michael Dell (50:29):
We'll go make it happen. Awesome. Thanks Jensen. Thank you ladies and gentlemen Jensen Huang. Alright, look, we couldn't be more excited to partner with Nvidia on this journey. Jensen is a big thinker and he makes these big, great giant GPUs and he also sees the big picture. And I'd like us all to take a step back now and look at the big picture. Let's open up the aperture. And the real question isn't how big AI is going to be, but how much good is AI going to do? How much good can AI do for you? Well, that's up to you. Well, reinvention and re-imagining your organization, it's hard. It feels risky, even frightening. But the bigger risk and what's even more frightening is what happens if you don't do it. How much good can AI do for the world?

(51:37):
Well, that's really up to all of us. We are unleashing this super genius power. Everyone is going to have access to this technology and it's going to get smarter and more powerful quickly. Now in the wrong hands and put to the wrong means it's a powerful threat. AI should be trained within the parameters of our morality, our beliefs, our laws, and our humanity. Because eventually artificial intelligence will be at the center of all of our lives, our security, our commerce, our education, our science and healthcare advancing progress at breathtaking speeds. We also must face the fact that it's going to take a whole lot of infrastructure as Jensen just described, and a whole lot of energy. And we're doing our part. For decades, we've been designing systems to reduce the energy consumption in our solutions and we're committed to running the greenest infrastructure and helping you meet your goals.

(52:44):
Sustainable data centers keep energy costs down and minimize energy usage with more efficient hardware, smart power management, liquid and air cooling, and increasingly green and renewable energy sources. Our software tracks and forecasts, energy and emissions. It automates Power Thermal Management using Telemetry. And we also have leading asset recovery, refresh and recycle programs to responsibly retire the previous generation of systems. For us to realize the possibilities of AI, we need to do it responsibly and address the barriers to adoption holistically. Now, governments can adopt an AI first investment strategy with a focus on strong infrastructure development and agile regulations to empower innovation. And we stand ready to support government leaders and together shape a safe, innovative, and inclusive future for AI. By making the right decisions today, we can take advantage of an

opportunity that will define future generations. Now if we don't do that, it'd be a shame. It'd be a loss for all of us and for the world. But because in many ways, big and small, we've already seen how AI is changing lives for the better. We call it AI for human progress. And we'd like to share a few of those stories with you now.

Video (54:25):

What does AI mean for our future? We can see it already in ways big and small, like how doctors around the world are teaming up with AI to revolutionize healthcare building models to read x-rays, study patient data and fight diseases like cancer. And researchers are using energy efficient AI supercomputers to improve genomics, food security and agriculture across Africa, ensuring crops thrive and a more sustainable future blooms. team members in Brazil are finding new and inclusive ways to communicate and collaborate through an AI digital assistant for the deaf and hard of hearing. With the power of technology, everything is possible. And for my generation, we're just getting started. Take students like me who joined Dell's student tech crew to help peers with IT issues. And now I'm going to use AI tools to keep society safe and secure. Or the students in junior achievement who use simulations to solve problems in their local communities and those in the HOPEWORKS organization who are actively training a gen AI tool that will help people around the world prepare for job interviews. Who knew we'd be using AI to transform nerves into confidence and unlock job opportunities we didn't know were possible. With AI, we aren't just imagining the future, we're building it. Today's pioneers and tomorrow's pathfinders fueling human progress together one innovation at a time.

Michael Dell (56:19):

We are at the dawn of a new age of cognition, the age of AI and the possibilities are igniting the spirit of today's greatest innovators, some of whom we are so thankful could join us today. Like ServiceNow's, Bill McDermott, Dr. Sungwoo Hwang of Samsung, SDS and NVIDIAs, Jensen Huang

(56:51):

(56:51):

Thank you. Thank you. And even more important than today's innovators are what this super intelligence can mean for the next generation of innovators. Like those from Hopeworks or Student Tech Crew or from Junior Achievement. This is what it's all about, the power of the future. Because what's next is now. Thank you all so much. Have a great time here at Dell Technologies World. Enjoy the rest of the show.