Dell Technologies IT Strategy Pulse
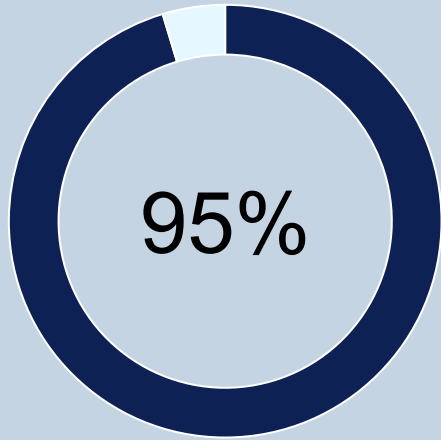
A survey by Vanson Bourne of 750 IT and business decision makers from US, UK, DE, FR and JP, November 2025

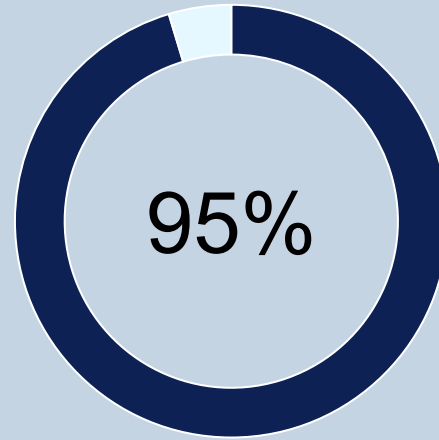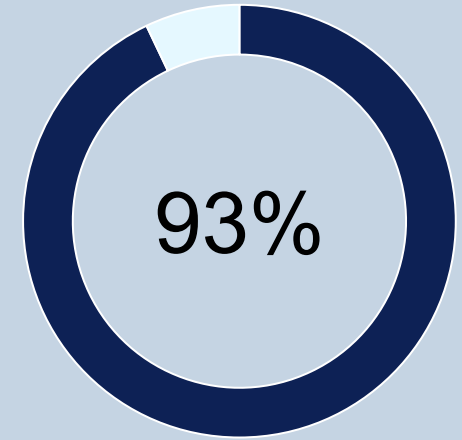**DELL**Technologies   VansonBourne

Choosing the right technology partner reduces risk and drives results.

95%

agree working with a trusted technology partner **reduces the risk associated with adopting new technologies.**

95%

agree working with a trusted technology partner helps them **achieve measurable outcomes** from their technology investments quicker.

93%

agree **energy efficiency and product sustainability are key factors** when selecting technology partners for their organization.

DELLTechnologies

Organizations are seeking a technology partner who strategizes with them to implement the right solutions for long-term success.

What is the most significant value a technology partner can provide for your organization?

Category	Value
Delivering end-to-end professional services to strategize, implement, adopt and scale new technologies, like AI	50%
Delivering solutions that provide the best long-term value and performance for my organization	50%
Increasing security posture and minimizing risks	50%
Enhancing workforce productivity and experience with AI-enabled technologies	50%
Improving our environmental sustainability by reducing energy use and waste (e.g., minimize IT carbon footprint, lower energy costs, recycle IT equipment etc.)	48%
Simplifying our IT environment to reduce complexity	42%
Providing scalable technology to support future growth	40%
Offering a comprehensive portfolio of AI solutions across devices, data centers and clouds, all through a single vendor.	40%

D∅LL Technologies

Most significant value a technology partner can provide

Top 3 by country

USA

1. Enhancing workforce productivity and experience with AI-enabled technologies
2. Delivering end-to-end professional services to strategize, implement, adopt and scale new technologies, like AI

(tie) Increasing security posture and minimizing risks

UK

1. Delivering solutions that provide the best long-term value and performance for my organization
2. Increasing security posture and minimizing risks
3. Enhancing workforce productivity and experience with AI-enabled technologies

France

1. Enhancing workforce productivity and experience with AI-enabled technologies
2. Delivering end-to-end professional services to strategize, implement, adopt and scale new technologies, like AI
3. Improving our environmental sustainability by reducing energy use and waste

Germany

1. Delivering end-to-end professional services to strategize, implement, adopt and scale new technologies, like AI
2. Delivering solutions that provide the best long-term value and performance for my organization
3. Improving our environmental sustainability by reducing energy use and waste

Japan

1. Increasing security posture and minimizing risks
2. Delivering solutions that provide the best long-term value and performance for my organization
3. Delivering end-to-end professional services to strategize, implement, adopt and scale new technologies, like AI

DELLTechnologies

Most significant value a technology partner can provide

Top 3 by industry

Financial Services & Insurance

1. Delivering end-to-end professional services to strategize, implement, adopt and scale new technologies, like AI
2. Enhancing workforce productivity and experience with AI-enabled technologies

(tie) Increasing security posture and minimizing risks

Healthcare & Life Sciences

1. Improving our environmental sustainability by reducing energy use and waste
2. Delivering end-to-end professional services to strategize, implement, adopt and scale new technologies, like AI
3. Enhancing workforce productivity and experience with AI-enabled technologies

Manufacturing

1. Delivering end-to-end professional services to strategize, implement, adopt and scale new technologies, like AI
2. Delivering solutions that provide the best long-term value and performance for my organization
3. Enhancing workforce productivity and experience with AI-enabled technologies

Energy & Utilities

1. Enhancing workforce productivity and experience with AI-enabled technologies
2. Delivering end-to-end professional services to strategize, implement, adopt and scale new technologies, like AI

(tie) Increasing security posture and minimizing risks

(tie) Simplifying our IT environment to reduce complexity

Public

1. Increasing security posture and minimizing risks
2. Delivering solutions that provide the best long-term value and performance for my organization
3. Enhancing workforce productivity and experience with AI-enabled technologies

DELLTechnologies

Most significant value a technology partner can provide

Top 3 by organization size and respondent type

Large organizations

1. Increasing security posture and minimizing risks
2. Enhancing workforce productivity and experience with AI-enabled technologies
3. Delivering end-to-end professional services to strategize, implement, adopt and scale new technologies, like AI

Medium-sized organizations

1. Delivering end-to-end professional services to strategize, implement, adopt and scale new technologies, like AI
2. Delivering solutions that provide the best long-term value and performance for my organization
3. Improving our environmental sustainability by reducing energy use and waste

Small-sized organizations

1. Enhancing workforce productivity and experience with AI-enabled technologies
(tie) Improving our environmental sustainability by reducing energy use and waste
3. Delivering solutions that provide the best long-term value and performance for my organization

IT decision maker

1. Delivering end-to-end professional services to strategize, implement, adopt and scale new technologies, like AI
2. Enhancing workforce productivity and experience with AI-enabled technologies
3. Improving our environmental sustainability by reducing energy use and waste

Business decision maker

1. Delivering solutions that provide the best long-term value and performance for my organization
2. Increasing security posture and minimizing risks
3. Enhancing workforce productivity and experience with AI-enabled technologies
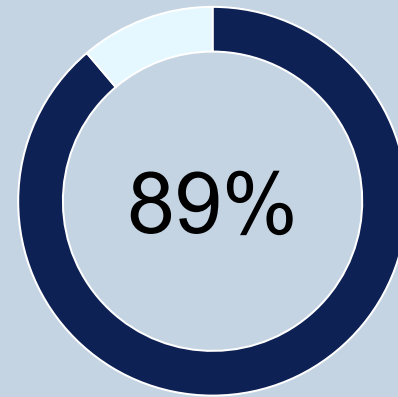
DELLTechnologies

# AI-ready infrastructure is now a business imperative.

90%
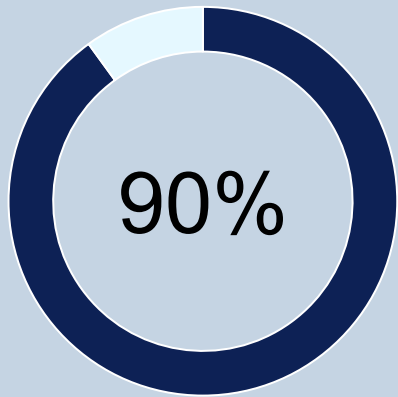
agree bringing AI to their data creates **more value for their organization** because they control it, the data is fresh and they have secure access.

87%
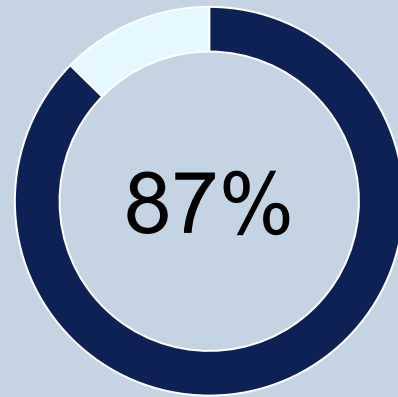
agree that thanks to AI, they can now **better prevent, detect and recover from security threats.**
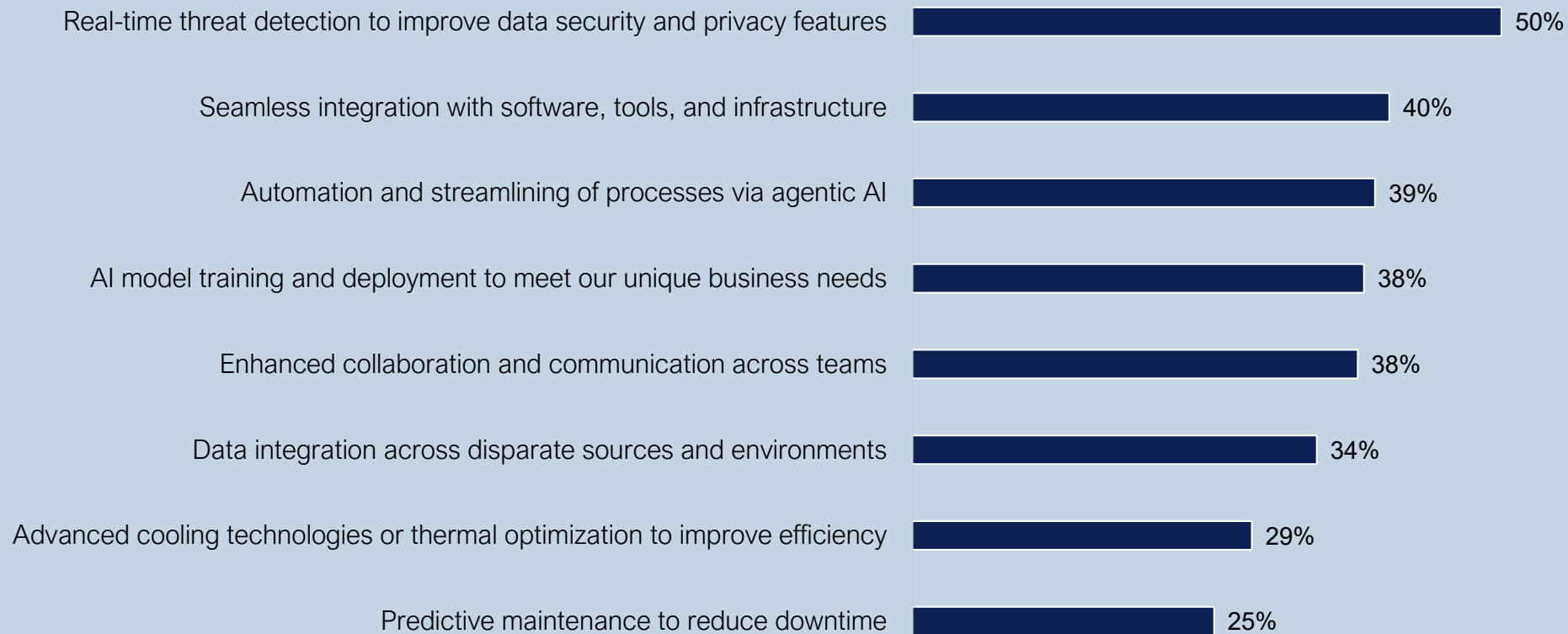
89%

agree that it is **critical that their PCs support AI-driven applications/workloads.**

69%
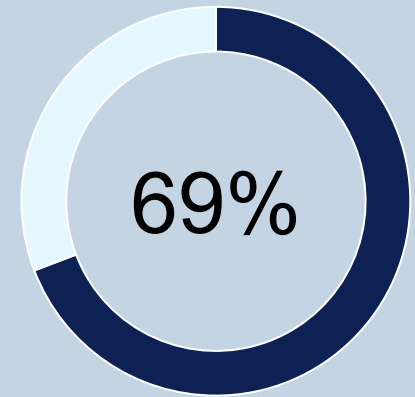
agree that existing storage capacity and capabilities are **insufficient for their growing AI needs.**

DELLTechnologies

Organizations are looking for seamless AI integration and security.

Thinking about AI technologies (PCs or infrastructure), what are the most valuable capabilities they bring to your organization or role?

Capability	Percentage
Real-time threat detection to improve data security and privacy features	50%
Seamless integration with software, tools, and infrastructure	40%
Automation and streamlining of processes via agentic AI	39%
AI model training and deployment to meet our unique business needs	38%
Enhanced collaboration and communication across teams	38%
Data integration across disparate sources and environments	34%
Advanced cooling technologies or thermal optimization to improve efficiency	29%
Predictive maintenance to reduce downtime	25%

DELLTechnologies

Most valuable capabilities of AI technologies

Top 3 by country

USA

1. Real-time threat detection to improve data security and privacy features
2. Seamless integration with software, tools, and infrastructure
3. Enhanced collaboration and communication across teams

UK

1. Seamless integration with software, tools, and infrastructure
2. Real-time threat detection to improve data security and privacy features
3. Automation and streamlining of processes via agentic AI

France

1. Real-time threat detection to improve data security and privacy features
2. AI model training and deployment to meet our unique business needs

(tie) Enhanced collaboration and communication across teams

Germany

1. Real-time threat detection to improve data security and privacy features
2. Seamless integration with software, tools, and infrastructure
3. Data integration across disparate sources and environments

Japan

1. Real-time threat detection to improve data security and privacy features
2. Automation and streamlining of processes via agentic AI
3. Seamless integration with software, tools, and infrastructure

DELLTechnologies

Most valuable capabilities of AI technologies

Top 3 by industry

Financial Services & Insurance

1. Real-time threat detection to improve data security and privacy features
2. Automation and streamlining of processes via agentic AI
3. AI model training and deployment to meet our unique business needs

Healthcare & Life Sciences

1. AI model training and deployment to meet our unique business needs
2. Seamless integration with software, tools, and infrastructure
3. Real-time threat detection to improve data security and privacy features

Manufacturing

1. Real-time threat detection to improve data security and privacy features
2. Automation and streamlining of processes via agentic AI
3. Seamless integration with software, tools, and infrastructure

Energy & Utilities

1. Real-time threat detection to improve data security and privacy features
2. Data integration across disparate sources and environments
3. Advanced cooling technologies or thermal optimization to improve efficiency

(tie) Automation and streamlining of processes via agentic AI

Public

1. Real-time threat detection to improve data security and privacy features
2. Enhanced collaboration and communication across teams
3. Seamless integration with software, tools, and infrastructure

DELLTechnologies

Most valuable capabilities of AI technologies

Top 3 by organization size and respondent type

Large organizations

1. Real-time threat detection to improve data security and privacy features
2. Seamless integration with software, tools, and infrastructure
3. Automation and streamlining of processes via agentic AI

Medium-sized organizations

1. Real-time threat detection to improve data security and privacy features
2. Seamless integration with software, tools, and infrastructure
3. Enhanced collaboration and communication across teams

Small-sized organizations

1. Real-time threat detection to improve data security and privacy features
2. Automation and streamlining of processes via agentic AI
3. Data integration across disparate sources and environments

IT decision maker

1. Real-time threat detection to improve data security and privacy features
2. Automation and streamlining of processes via agentic AI
3. AI model training and deployment to meet our unique business needs
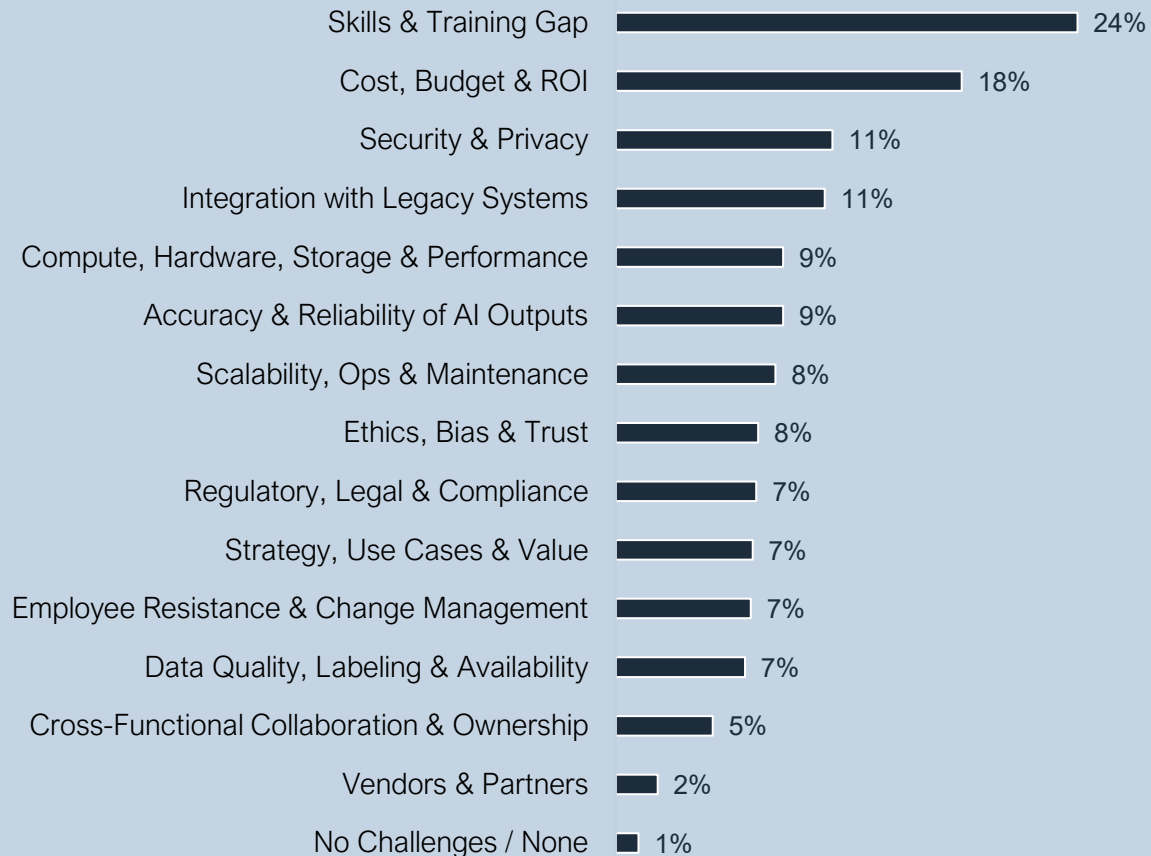
Business decision maker

1. Real-time threat detection to improve data security and privacy features
2. Seamless integration with software, tools, and infrastructure
3. Enhanced collaboration and communication across teams

DELLTechnologies

Modernization efforts stalled by skills gaps and legacy systems

Analysis of 692 verbatim answers

AI Implementation Challenges - Thematic Mentions

| Challenge	Percentage
Skills & Training Gap	24%
Cost, Budget & ROI	18%
Security & Privacy	11%
Integration with Legacy Systems	11%
Compute, Hardware, Storage & Performance	9%
Accuracy & Reliability of AI Outputs	9%
Scalability, Ops & Maintenance	8%
Ethics, Bias & Trust	8%
Regulatory, Legal & Compliance	7%
Strategy, Use Cases & Value	7%
Employee Resistance & Change Management	7%
Data Quality, Labeling & Availability	7%
Cross-Functional Collaboration & Ownership	5%
Vendors & Partners	2%
No Challenges / None	1%

AI adoption is being slowed by a shortage of **skilled talent** and **organizational readiness** for change. **Financial constraints** and **trust-related concerns** (such as data security, privacy, and model reliability) are also major hurdles. Additionally, legacy systems and **infrastructure limitations** continue to impede modernization efforts, making strategic alignment and investment critical for success.

Key AI **challenges are deeply interconnected**. Concerns about accuracy often coincide with issues of ethics, bias, and trust, highlighting the need for transparent and explainable models. Budget pressures are amplified by the cost of upskilling and infrastructure upgrades. Security and privacy concerns are tightly linked to regulatory, and compliance demands, underscoring the importance of robust governance frameworks.
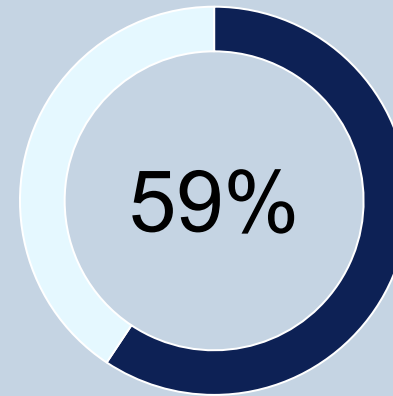
DELLTechnologies

Technology investments must align with long-term business goals.
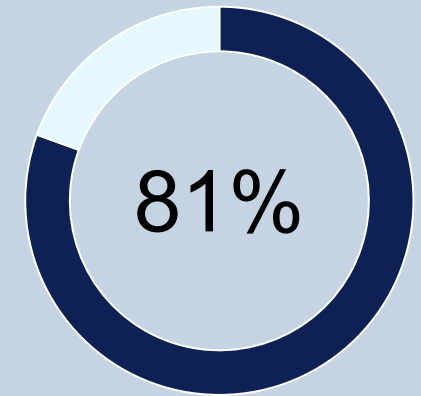
96%
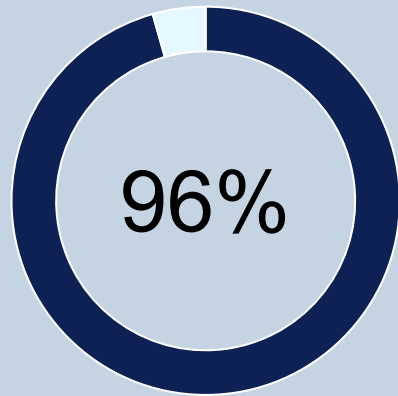
agree their technology **investments are aligned with their long-term business goals**

95%
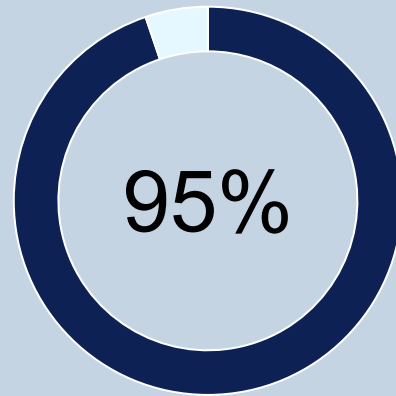
agree **enhanced security features are often a driving factor** in the selection of an infrastructure and/or PC purchase

59%

say they are **unsatisfied with the performance and reliability of their current PC fleet** and are considering a refresh

81%

agree their organization is **moving towards a disaggregated infrastructure model**

DELLTechnologies

Tech investments focus on agility, integration, and real-time insights.

Which of the following technologies is your organization investing in to stay competitive over the next 12 months?

Technology	Percentage
Cybersecurity and resilience to increase security posture	56%
Data management solutions to gain control of your data across workloads & environments	49%
Technologies to maximize agility, flexibility, and real-time insights across environments	46%
AI PCs, displays, and accessories to improve productivity and experience	44%
Agentic AI capabilities to augment our organization's existing capabilities.	44%
Data centers to run AI workloads	35%
Technologies that reduce energy and waste	34%
Data centers to power traditional workloads	28%

DELLTechnologies

Top 3 technology investments over the next 12 months

Top 3 by country

USA

1. Data management solutions to gain control of your data across workloads & environments
2. Cybersecurity and resilience to increase security posture
3. Agentic AI capabilities to augment our organization's existing capabilities

UK

1. Cybersecurity and resilience to increase security posture
2. Data management solutions to gain control of your data across workloads & environments
3. Technologies to maximize agility, flexibility, and real-time insights across environments

France

1. Cybersecurity and resilience to increase security posture
2. Data management solutions to gain control of your data across workloads & environments
3. Technologies to maximize agility, flexibility, and real-time insights across environments
(tie) AI PCs, displays, and accessories to improve productivity and experience

Germany

1. Cybersecurity and resilience to increase security posture
2. Technologies to maximize agility, flexibility, and real-time insights across environments
3. Data management solutions to gain control of your data across workloads & environments

Japan

1. Cybersecurity and resilience to increase security posture
2. AI PCs, displays, and accessories to improve productivity and experience
3. Agentic AI capabilities to augment our organization's existing capabilities

DELLTechnologies

Top 3 technology investments over the next 12 months

Top 3 by industry

Financial Services & Insurance

1. Real-time threat detection to improve data security and privacy features
2. Automation and streamlining of processes via agentic AI
3. AI model training and deployment to meet our unique business needs

Healthcare & Life Sciences

1. AI model training and deployment to meet our unique business needs
2. Seamless integration with software, tools, and infrastructure
3. Real-time threat detection to improve data security and privacy features

Manufacturing

1. Real-time threat detection to improve data security and privacy features
2. Automation and streamlining of processes via agentic AI
3. Seamless integration with software, tools, and infrastructure

Energy & Utilities

1. Real-time threat detection to improve data security and privacy features
2. Data integration across disparate sources and environments
3. Advanced cooling technologies or thermal optimization to improve efficiency
(tie) Automation and streamlining of processes via agentic AI

Public

1. Real-time threat detection to improve data security and privacy features
2. Enhanced collaboration and communication across teams
3. Seamless integration with software, tools, and infrastructure

DELLTechnologies

Top 3 technology investments over the next 12 months

Top 3 by organization size and respondent type

Large organizations

1. Real-time threat detection to improve data security and privacy features
2. Seamless integration with software, tools, and infrastructure
3. Automation and streamlining of processes via agentic AI

Medium-sized organizations

1. Real-time threat detection to improve data security and privacy features
2. Seamless integration with software, tools, and infrastructure
3. Enhanced collaboration and communication across teams

Small-sized organizations

1. Real-time threat detection to improve data security and privacy features
2. Automation and streamlining of processes via agentic AI
3. Data integration across disparate sources and environments
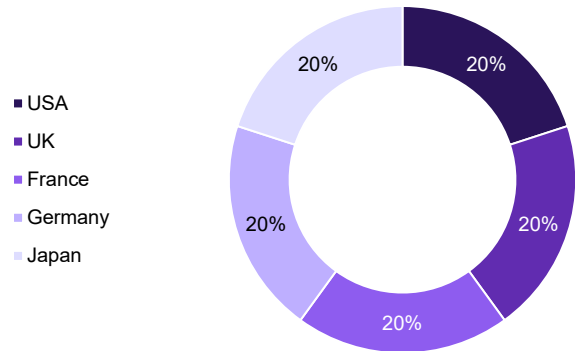
IT decision maker

1. Real-time threat detection to improve data security and privacy features
2. Automation and streamlining of processes via agentic AI
3. AI model training and deployment to meet our unique business needs

Business decision maker

1. Real-time threat detection to improve data security and privacy features
2. Seamless integration with software, tools, and infrastructure
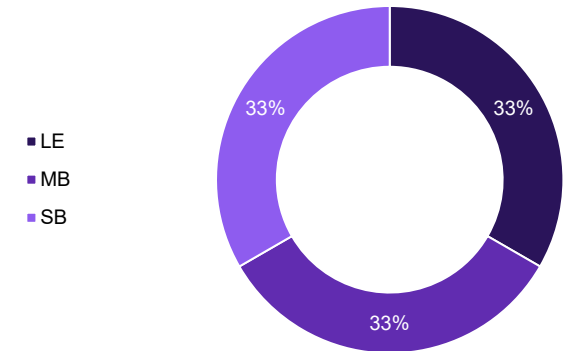3. Enhanced collaboration and communication across teams

D❤LL Technologies