



Innovating Together: Modern Work, Modern Infrastructure



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Here's what we've heard: market trends driving modernization



Modern Workplace

89%

agree it's critical that their AI PCs support AI-driven applications/ workloads¹



Modern Data Center

69%

agree their existing storage capacity capabilities are insufficient for their growing AI needs¹



Artificial Intelligence

84%

believe AI and GenAI will significantly transform their industry²



Cybersecurity & Resilience

#1

are the top technology areas organizations are investing in to stay competitive¹



Sustainability

93%

agree energy efficiency and product sustainability are key factors when selecting technology partners for their organization¹

¹Dell Technologies IT Strategy Pulse, a survey across 750 IT and business decision makers from US, UK, DE, FR and JP, November 2025.

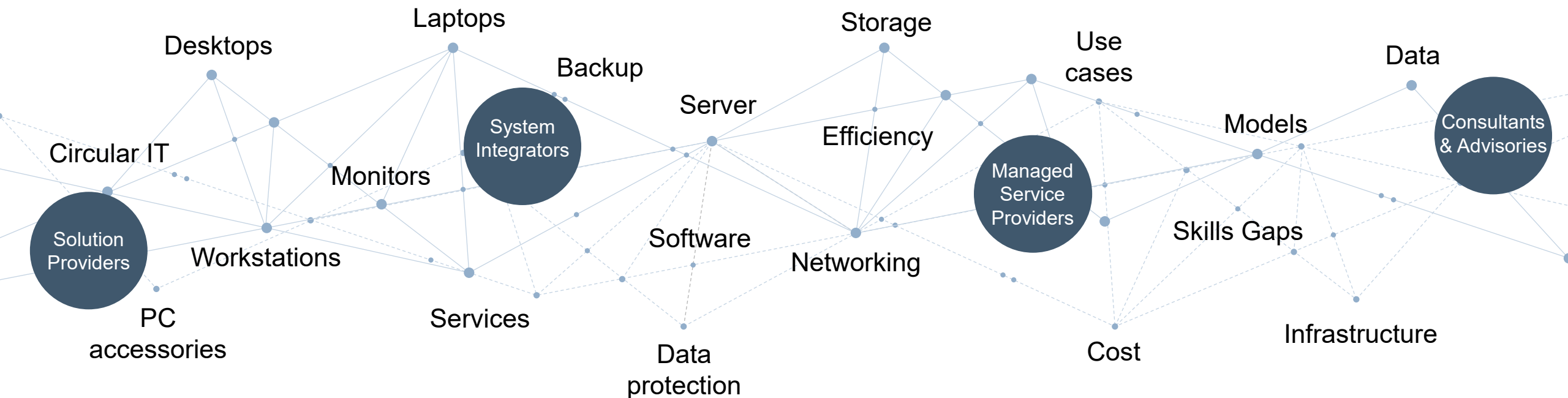
²Dell Technologies survey across 2,850 business and IT decision makers across 40 locations*, all segments, June 2025 (* US, UK, DE, FR and JP, Feb 2025).

Staying ahead in a rapidly changing technology landscape

Modern Workplace

Modern Data Center

Artificial Intelligence



Security / Resilience

Sustainability

Industry Realities: Innovation Under Pressure

Modern Workplace



Hybrid Work is the Norm

Artificial Intelligence



AI expectations are Rising

Modern Data Center



Cyber & Operations Risk Increasing

Budgets are tight, Prices are Rising & Supply uncertain

Supply Headwinds

Exponential AI infrastructure demand is straining supply chains rivaling Pandemic levels



globalcio.com
<https://globalcio.com/news>

RAM is going to AI: OpenAI has secured up to 40% of the ...

Dec 22, 2025 — OpenAI, the largest AI project, has secured up to **40%** of the world's **DRAM** supplies for the coming years. This is already impacting the RAM ... [Read more](#)



Notebookcheck
<https://www.notebookcheck.net/SK-hynix-sells-out-its-...>

SK hynix sells out its DRAM, NAND, and HBM chip supply ...

Oct 30, 2025 — **SK Hynix** has confirmed that all **DRAM**, **NAND**, and high-bandwidth memory (**HBM**) production through 2026 has been **sold out**, much of it to Nvidia ...



Tom's Hardware
<https://www.tomshardware.com/Storage/HDDs>

Western Digital is already sold out of hard drives for all ...

1 day ago — **Western Digital** is already **sold out of hard drives for all of 2026** — chief says some long-term agreements for 2027 and 2028 already in place. [Read more](#)



PCWorld
<https://www.pcworld.com/article/ram-is-so-expensiv...>

RAM is so expensive, Samsung won't even sell it to Samsung

Dec 3, 2025 — Due to rising prices from the "AI" bubble, **Samsung Semiconductor** reportedly refused a **RAM order** for new Galaxy phones from Samsung Electronics. [Read more](#)



PCMag
<https://www.pcmag.com/News/Components>

DDR5 RAM Can Now Cost More Than a PlayStation 5

3 days ago — The average price for 64GB of **DDR5 RAM** has skyrocketed past \$500. If you want 128GB, expect to pay more than what it costs to buy some **PCs**.



Investing.com Canada
<https://ca.investing.com/analysis/micron-faces-a-rera...>

Micron Faces a Rerating Moment as Sold-Out HBM Supply ...

8 days ago — Micron Technology (NASDAQ:MU) at \$396.57 — **HBM4 One Quarter Early, 2026 Supply Sold Out**, \$8.58 EPS on March 18, and the \$1,000 Price Target ... [Read more](#)



Persistent Upward Cost Pressure

AI data centers are consuming most of the available memory and wafer supply, and new capacity won't fully ramp for years.

Plan for sustained component cost pressure into 2028.

↑ Supply Constraints

- Manufacturers shifting capacity to High-Capacity NAND and HBM for AI
- Up to 70% of the global memory and storage supply for 2026 is already allocated to AI data centers*
- Manufacturers controlling output to protect pricing — no aggressive expansion
- New fabrication plant require 6-10 years to reach full-scale production due to complexity, capital, planning and yield ramping
 - Construction (1-2 Years)
 - Equipment Installation, Tooling, Qualification (3-5 Years)
 - Production Yield Ramp-up / Phased Expansion (1-3+ Years)
 - *Micron Singapore*, \$24B NAND fab forecasts 8 years for full capacity; *Micron New York*, \$100B 4-fab project forecasted to hit full, multi-fab capacity in 2045)

📊 Demand Surge

- Enterprise AI pilots are scaling to production, making demand more durable and less cyclical
- AI infrastructure spending over \$700B in 2026
- Hyper-growth in AI silicon is monopolizing advanced foundry output, crowding out other sectors
- Panic buying and stockpiling amplifying the shortage further

Critical Timeline: Next 1 to 3 years will be the most acute phase of this supply challenge. No meaningful price relief is expected before 2028 at the earliest.

Modern Work: Hybrid, Intelligent, Secure

Modernization Can't Wait

With industry-wide PC price increases & tight supply constraints

Drivers of modernization:



Rising user expectations



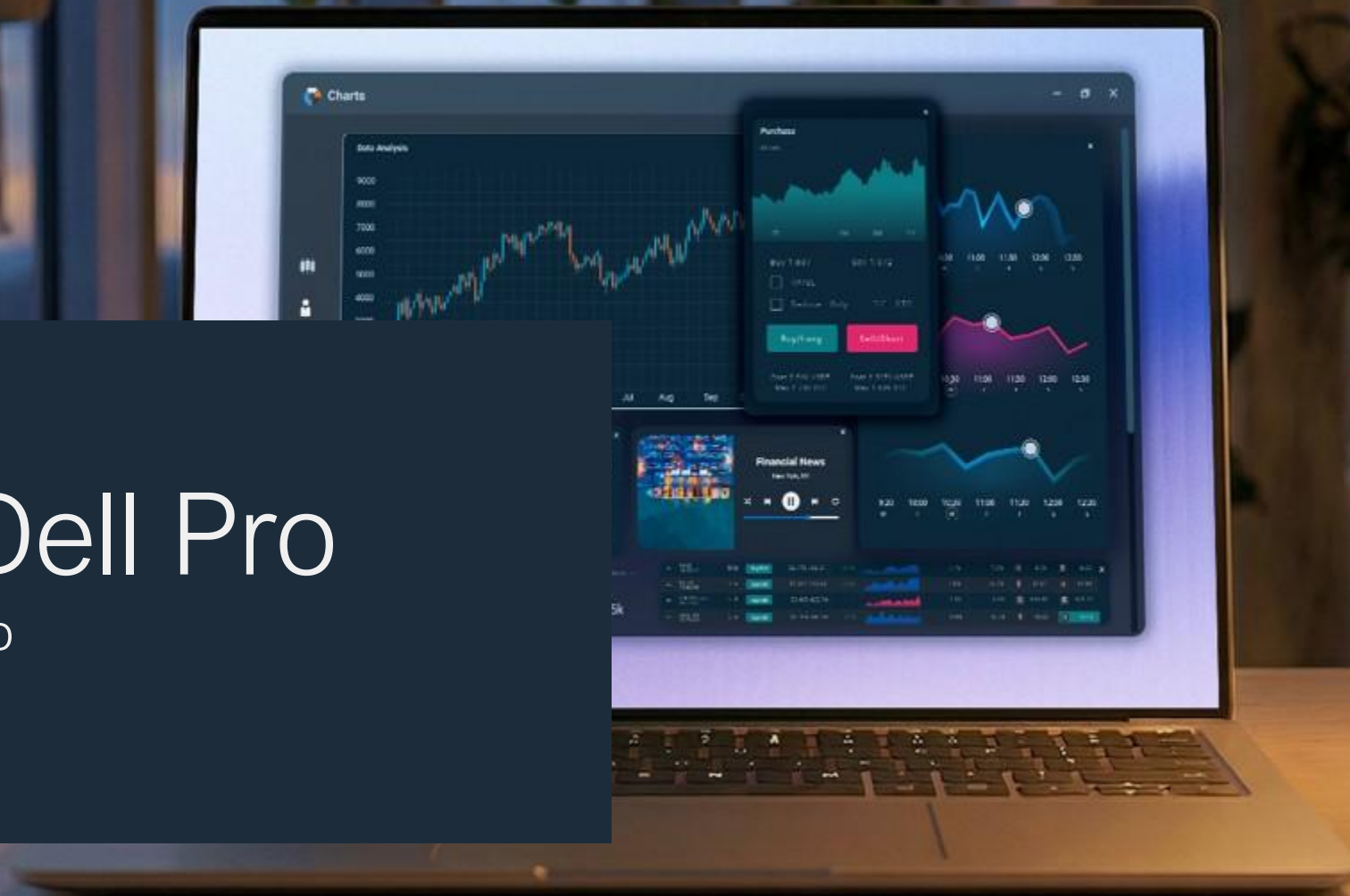
Growing security concerns & IT complexity



Increasing pressure to do more with less

2026 Dell Pro

Laptop Portfolio



A simplified product naming framework

Consumer

EVERYDAY

Dell XPS

Dell

GAMING

Alienware

OFFICE

Dell Pro

Commercial

PERFORMANCE

Dell Pro Precision

PURPOSE BUILT

Dell Pro Rugged
Dell Pro Essential
Dell Pro Education

Our most Innovative portfolio.

Cutting edge new designs optimized around latest architecture with elevated features now in our mainstream products.

- ✓ Thinnest Dell Pro portfolio ever with all new designs
- ✓ Cohesive magnetite color for seamless look/feel
- ✓ Next-gen processors from Intel and AMD
- ✓ More performance in our mainstream notebooks
- ✓ More N-1 coverage
- ✓ Higher brightness base panels and optional FHD OLED
- ✓ New 8MP cameras for better collaboration
- ✓ vPro, TBT, and continued N-gen CPU in Entry



Dell Pro Laptops



Dell Pro 3 Series

Durable, reliable, and equipped with commercial-grade security and manageability for everyday business productivity.

- Dell Pro 3 14 (P314260)
- Dell Pro 3 14 (P314265)
- Dell Pro 3 16 (P316260)
- Dell Pro 3 16 (P316265)

Dell Pro 5 Series

Industry's most scalable mainstream laptops offer a variety of configurations, including the highest performance options in the Dell Pro laptop portfolio.

- Dell Pro 5 14 (P514260)
- Dell Pro 5 14 (P514265)
- Dell Pro 5 16 (P514260)
- Dell Pro 5 16 (P514265)

Dell Pro 7 Series

Industry's thinnest mainstream laptops with a 2-in-1 option for the versatility to work in four different modes.

- Dell Pro 7 13 (P713260)
- Dell Pro 7 13 2-in-1 (P703260)
- Dell Pro 7 14 (P714260)
- Dell Pro 7 14 2-in-1 (P704260)

Dell Pro Premium

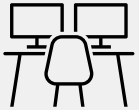
Ultimate in commercial mobility with a premium design, innovative experiences, and our lightest chassis.

- Dell Pro 14 Premium (PA14260)

*Above images are not representative of the entire portfolio.; please refer to product slides for details.
AI PC options not available on Dell Pro Micro Thin Client



Modernize your workplace with Dell Technologies



**Comprehensive
innovative
product portfolio**



**Trusted reliability
and durability**



**Most secure and
manageable
commercial PCs**



**Unmatched global
services**

World's Broadest AI Infrastructure Portfolio + Industry Leading Supply Chain

¹Based on Pwerc Consulting's paper commissioned by Dell, "Which Vendor Offers the Broadest AI Portfolio for Scalable Innovation?" October 2025



Data center modernization is ongoing, not a point in time

Realities facing today's IT leaders:



AI-driven workloads



Evolving security threats



Expanding cloud & edge environments



Cost & efficiency pressures



Continuous innovation



Why are so many organizations struggling to realize measurable impact from AI?



Pilot projects stalling without clear goals



Workload and data challenges



Existing infrastructure hindering innovation



Lack of AI tools slowing deployment



Skills gaps preventing AI adoption & success

Cybersecurity and resilience maturity enables agility

1 Secure by Design



Built-In



Built-On



Built-With

2 Cybersecurity Practice Areas



Reduce The Attack Surface



Detect & Respond To Cyber Threats



Recover From A Cyberattack

3 Cybersecurity and Resilience at Scale



Global security services



Extensive partner ecosystem



Forward-looking investments (post-quantum cryptography and secure AI)



Smarter Ways to Fund and Grow IT with Dell APEX



Brian O'Toole

Consumption & Software Sales Leader

Funding your technology investment

Dell Technologies Payment Solutions



Subscription Experience

Lifecycle Management solutions tied to the circular economy

- Dell APEX PC as a Service
- Technology Rotation



Consumption Experience

Pay per use solutions to enable more agility and control

- Dell APEX Subscriptions
- Dell APEX Data Center Utility



Ownership Experience

Solutions to spread cost over time with a goal to own the technology

- Technology Ownership
- Software Installments

Predictability, flexibility & choice

Thank You