

Technology Disruptors and their Impact

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Digital transformation - today's business imperative

Exponential change and opportunity



Implications ... Future People

Claire



Alex



Claire – a working mom ... lives life!

- Shops.. but never visits a shop
- Always online.. but never logs on
- Optimizes her digital ratings in real-time
- Never gets lost
- Drives a car.. but hasn't learned to drive
- Has 3 jobs tailored to her family life
- Never does housework - has a Robot called Jane!



Alex – just started work after college – he loves it ...

- Maintenance engineer - large manufacturer
- Smart watch – navigate to different facilities
- Tablet - displays schedule / work orders
- Smart glasses – machine instructions
- ‘How to’ videos via voice commands
- Has an expert AI coach on demand
- Operates like a seasoned pro .. after two weeks!



Early stages of another great wave of innovation

1993-2005 – Web/e-Commerce

- Email
- Free media
- Browse/search
- Choice/convenience
- Retail/payments

2006-2016 – Social/Mobile/Cloud

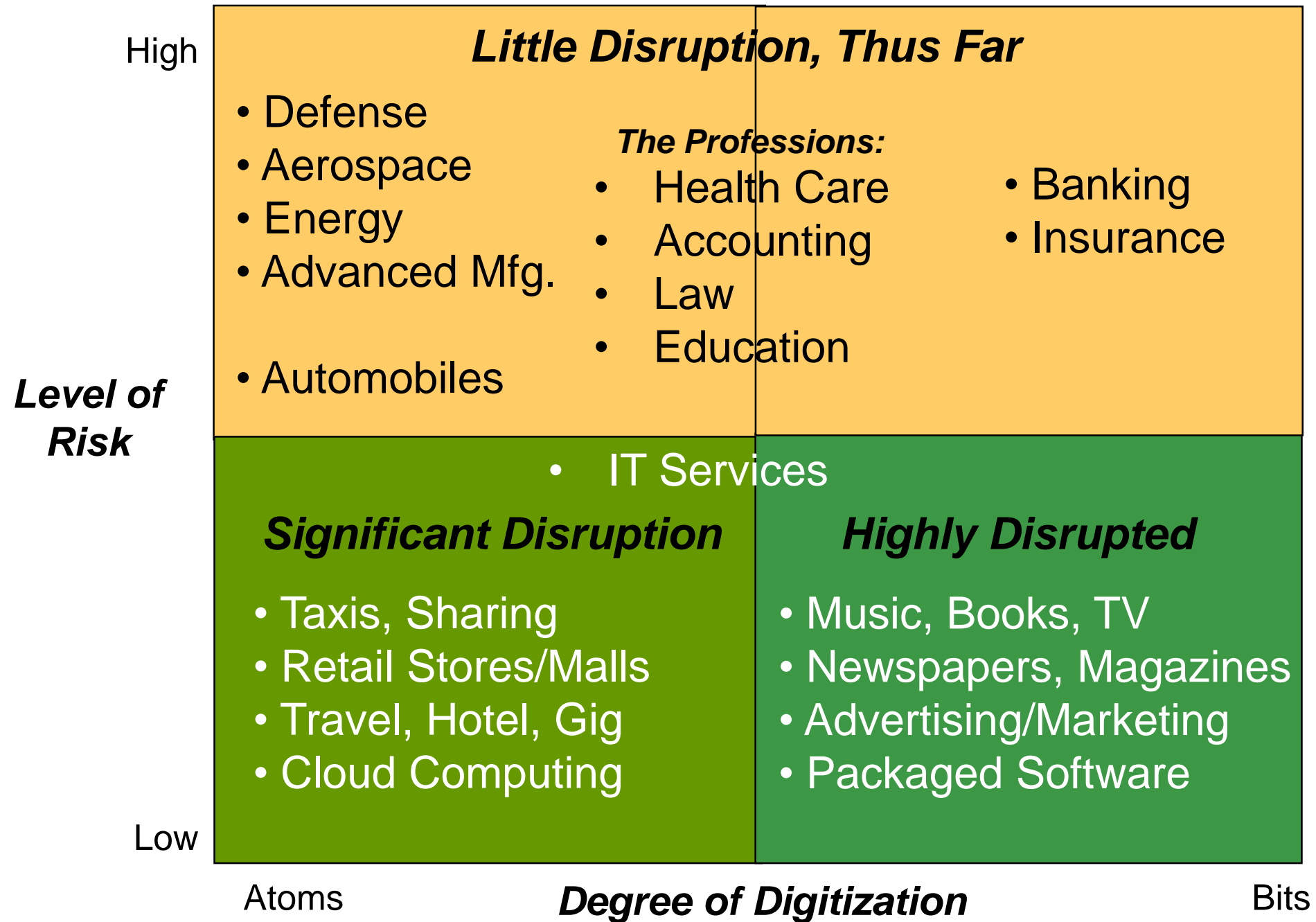
- Mobility/apps/location
- Cloud computing
- Software as a Service
- Social media/P2P
- Open source/sharing



2017-2030 – Post-Cloud Intelligence & Automation

1. Machine learning
2. Speech/image processing
3. Agents/bots/algorithms
4. IoT, sensors, 3DP, serverless
5. Vehicles, drones, robots, 5G
6. Smart products/systems
7. Wearables/implants, AR/VR
8. Biometrics/brain interfaces
9. Blockchains, digital cash
10. GPUs, custom, quantum

This wave targets the industries in the top half



The digital world and the enterprise

All enterprises aspire to provide simpler more relevant customer experiences, leaders for innovation, operating as digital-first organizational ecosystems



New business models



Transportation



Shopping



Music

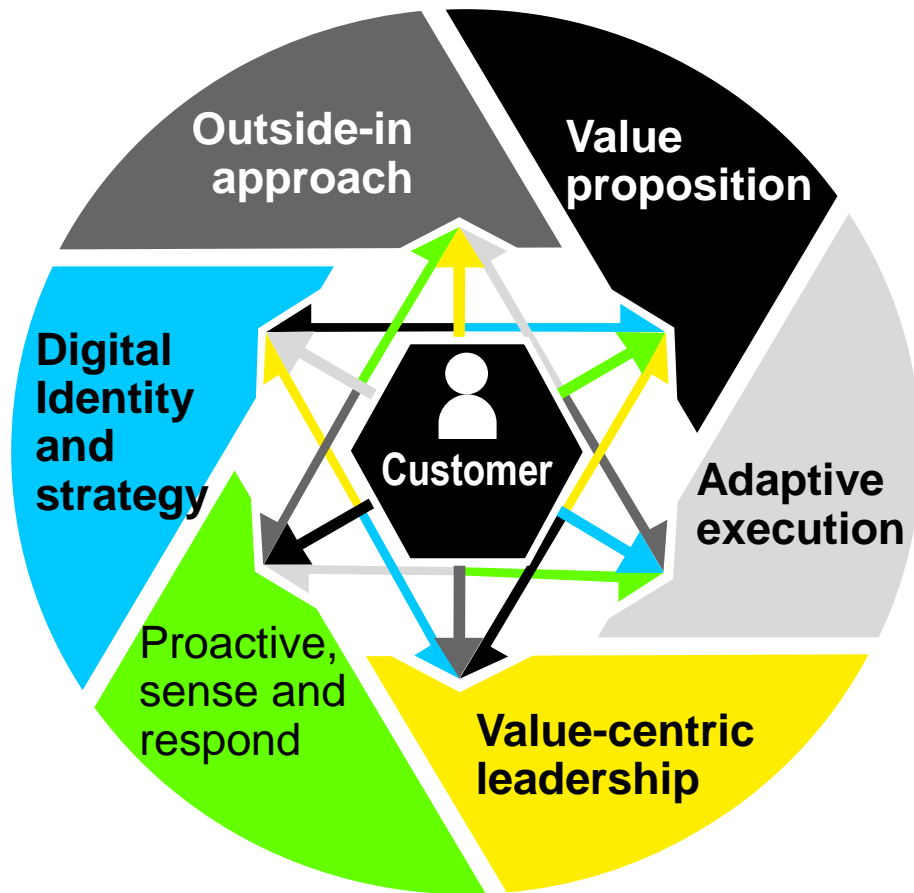
Platform-based models

- Increasing brand value
- High market capitalization
- Reputation for being ahead
- Increased agility and flexibility
- Good employers
- Trusted
- Vast partner ecosystems
- Trending upward

Only 1 in 5 Enterprises are successfully making the change

This is because this requires new organizational thinking and culture...

Change dimensions...



Change dynamics...



Major culture shift...

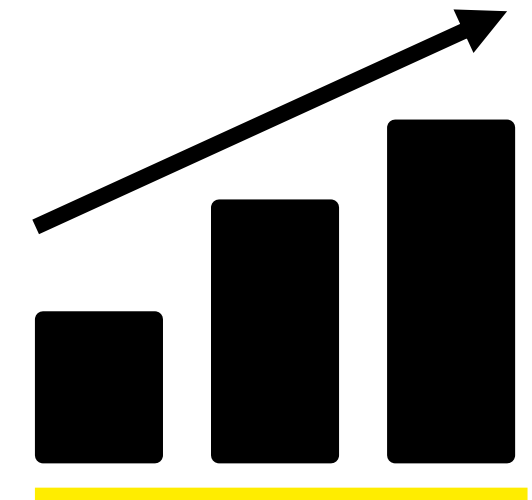
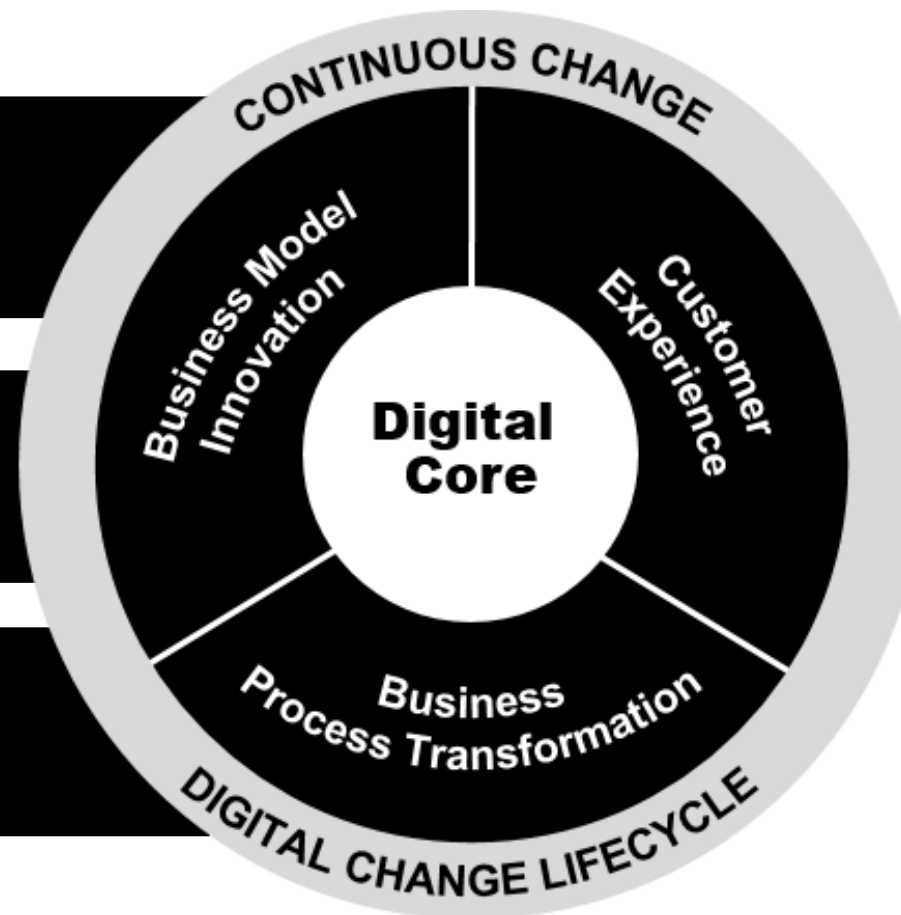


Digital is not a thing – it's a revolution – that's just starting

Continuously introducing disruptions that shape new sources of value creation

Three truths of the digital era → Four sources of digital value creation

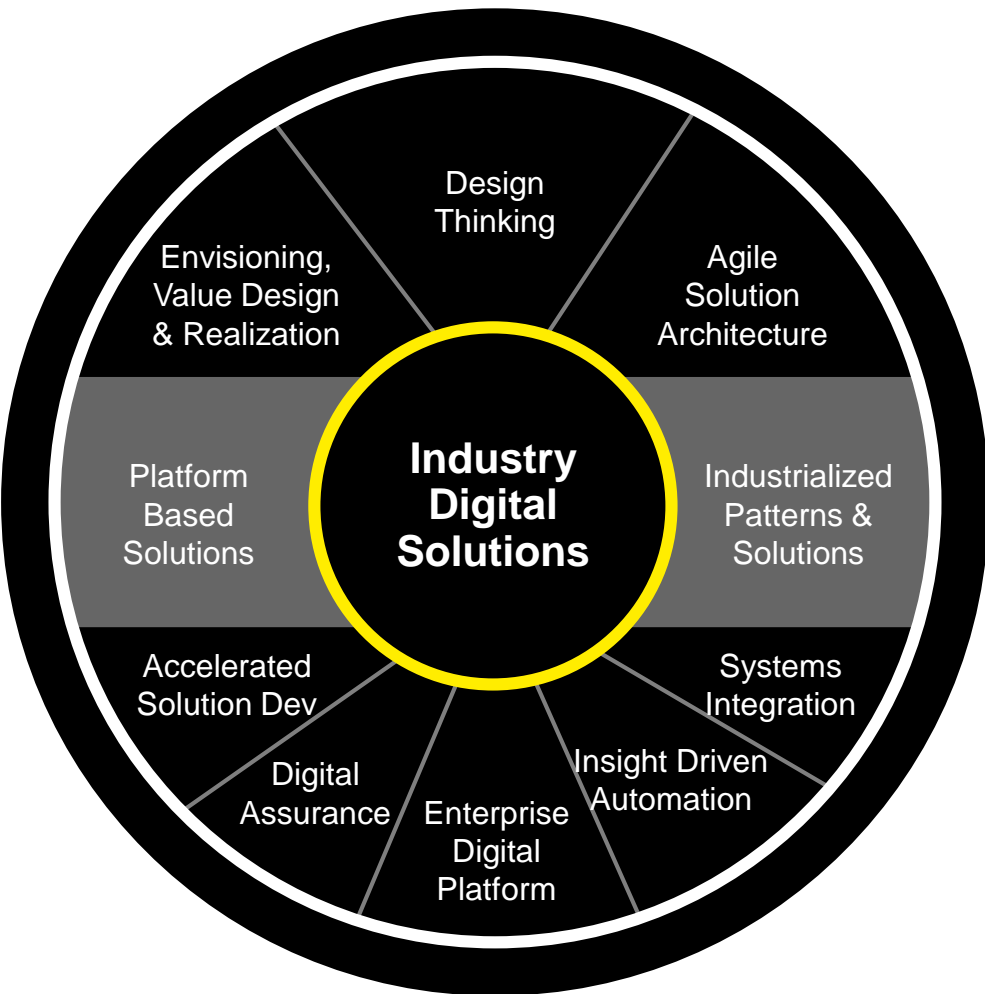
- 1** Digital consumers are in control
defining the next move
- 2** Platforms disrupt value chains
asymmetric competition is normal
- 3** Winners exploit platform effects
cultures of continuous change



Economic Value Added
and Return on Invested Capital

Digital Capabilities, Technologies and Partnerships

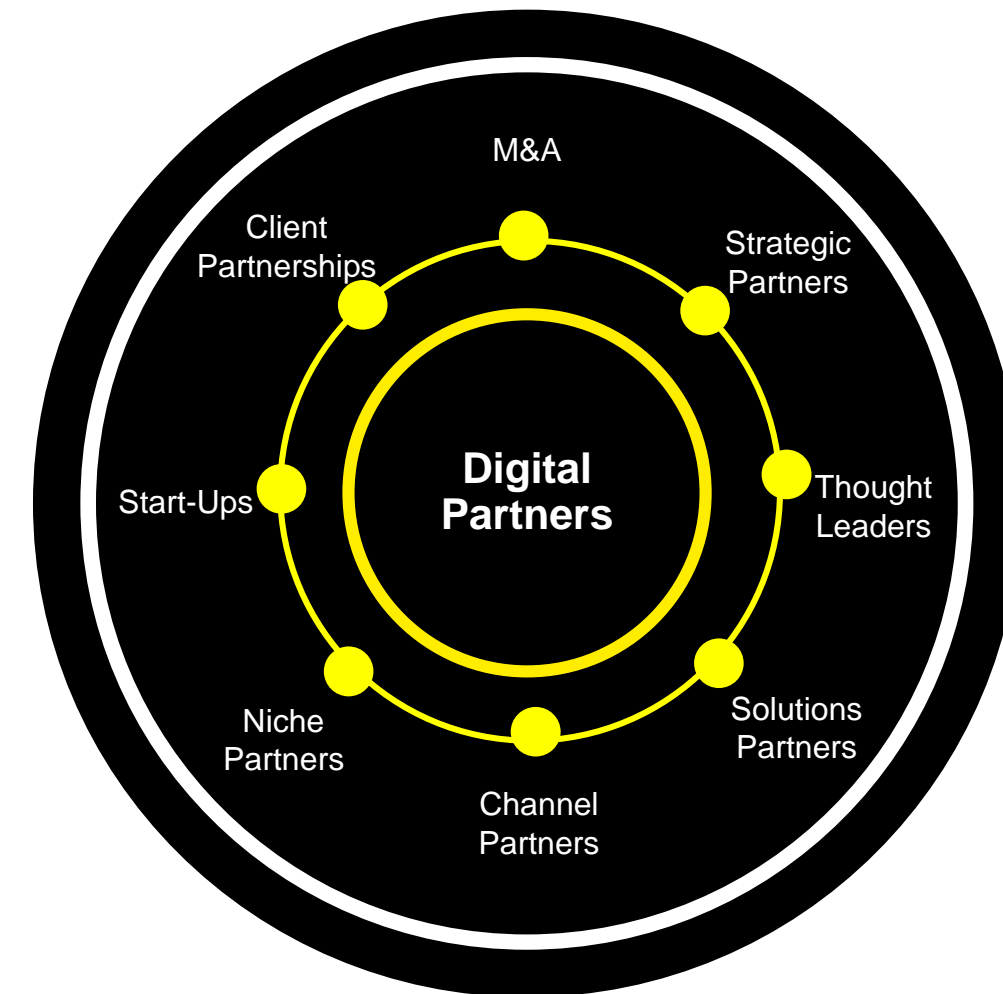
Develop and invest in digital skills, capabilities, technologies and partnerships



CAPABILITIES

Internet of Things (IoT)	Wearables	Augmented Reality (AR)	Virtual Reality (VR)
Artificial Intelligence (AI)	Robotic Process Automation	Machine Learning (ML)	Cognitive Computing
Blockchain	Drones	Autonomous Vehicles	3D Printing
Cloud	Analytics	Mobility	Security

TECHNOLOGIES



PARTNERSHIPS

Digital Delivered.



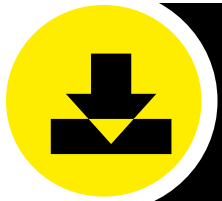
New business model innovations



Better – more relevant customer experiences



Improved process efficiency and effectiveness



Greater cost reductions to increase business agility and value



Thank you

