



FUTURE-PROOF

Elevating the voice of Gen Z to shape
the economies of tomorrow

A Dell Technologies report to Inform, Inspire, and Instigate
Future-Ready Digital Transformations across Governments,
Public Sectors, Businesses & Communities

DELLTechnologies



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FOREWORD

The challenges and opportunities we face today are legacy-defining. Listening to, learning from, and elevating the voice of those who will be impacted in the long-term by today's digital decisions is key.

Taking the time now to collaborate, plan, and secure our world's future prosperity, security, and health is a vital step for governments, businesses, and civic society.

As President of International Markets for Dell Technologies, I am pleased to introduce this research on how technology can be harnessed to benefit and support the next generations, as seen through the eyes of Gen Z. As a father of two Gen Zers, I see first-hand how crucial it is that we listen to and seek to understand the voice of this tech-savvy generation. They are the first true digital natives and deserve the chance to shape their own futures.

Looking at our findings, it is clear Gen Z is calling for governments to lead the way digitally, through investing in future-proof technologies to support and empower our most vital sectors and industries. It is also clear that Gen Z sees strategic collaboration through a partnership approach between public and private sectors as preferable, both in bridging digital skills gaps and enhancing online accountability.

As finding solutions for the climate crisis remains front of all our minds, it is encouraging that almost two-thirds of Gen Zers (64%) view technology as having an important role to play in addressing this challenge. Deeper analysis of these figures, however, shows a stark geographic divide – with respondents from Italy strongly agreeing on the importance (88%) with Japan less likely to agree (42%).

The power of governments in unlocking the potential of data-driven digital technologies to improve public services and drive economies can have seismic impact. Still, the situation's complexity is evident in that despite 29% having high confidence in government investments leading to a flourishing economy, 38% report being undecided on this front.

Many governments have made great strides in tech adoptions in recent years through rapid digital transformation programs, and the pathway to further accelerate this progress is here, today.

Through a continued focus on closing the digital divide by investing in internet connectivity, and improving access to healthcare, central government services, and education, governments can meet the expectations of Gen Z.

We are at a critical juncture. Through technology we can empower the next generation and help them to unlock their potential in work, in the services they use, and in future learning, while supporting our planet and its resources.

Now is the time to enable and drive human progress by skilling, collaborating, investing in infrastructure, and leveraging sustainable innovations that set future generations up for success.

Aongus Hegarty

Aongus Hegarty

President International Markets,
Dell Technologies



Executive Summary

As the largest generational cohort in history, Gen Z's attitudes and expectations should be central to shaping their future.

The Covid-19 pandemic has been a generation defining event, and as members of this generation mature and become future leaders, consumers, workers and voters, their views are incredibly important.

The decisions and investments that global governments and public sectors make today, will have a significant

and long-lasting bearing on the societies and economies that future generations inherit.

The challenges being faced today across many facets of public life are well documented. From the cost of living to energy supply, geopolitical conflict and healthcare, the scale of the task facing decision makers is vast.

What is clear from our findings is that Gen Z views the role of technology as central to addressing and preparing for some of the greatest challenges we face today, and will face in the future.

This research explored Generation Z adults' (18 – 26 years) views on how smart digital investments today can support the development of a digitally resilient future. Designed to guide governments, policy makers, and communities, we explored how technology could help:

1. Build resilient economies of the future
2. Play a role in sustainability, health, and the future of work
3. Master our digital futures



METHODOLOGY & SAMPLE SIZE

This study was conducted across 15 locations globally, focusing on 'Generation Z' adults (those aged 18-26), with nationally representative quotas set for gender and region in each country.

The findings of the study are collated from a sample size of 15,105 participants.

- **Australia** (1,018 respondents)
- **Brazil** (1,021 respondents)
- **Canada** (1,011 respondents)
- **France** (1,014 respondents)
- **Germany** (1,020 respondents)
- **Italy** (1,063 respondents)
- **Japan** (1,021 respondents)
- **Korea** (1,020 respondents)
- **Mexico** (1,005 respondents)
- **Netherlands** (1,013 respondents)
- **New Zealand** (811 respondents)
- **Singapore** (1,022 respondents)
- **Spain** (1,019 respondents)
- **United Kingdom** (1,041 respondents)
- **United States** (1,006 respondents)

Savanta:
ComRes

The research was commissioned by Dell Technologies and undertaken by Savanta ComRes; a market research consultancy based in London, England.

KEY FINDINGS AT A GLANCE

ON GOVERNMENT TECHNOLOGY INVESTMENTS



Our findings suggest that Gen Z's confidence in public sector technology investments to deliver a flourishing economy within 10 years is in the balance: a third (32%) have low or no confidence, while 38% are undecided and 29% have high or total confidence. **This suggests that there is an opportunity for governments to show Gen Z that they can invest well in their country's digital future.**

Policy Recommendation: Highlight Successes/Show Impact

Governments should highlight how their technology investments will benefit their country's digital future by demonstrating the problems they are solving, as well as the short and long-term impact those solutions have on communities, societies, and economies. For example, hospitals might highlight recent technology investments in healthcare that resulted in shorter wait times (cited as the primary reason Gen Z put off health care visits over the past 2 years) and enhanced access to overall healthcare services.

ON THE ROLE OF TECH IN ADDRESSING SOME OF OUR GREATEST CHALLENGES



Gen Z views investment in technology as key to securing universal internet connectivity, enhancing digital healthcare, improving digital access to central government services, and bettering digital education.

Almost two thirds (64%) believe that technology will play an important role in the fight against the climate crisis.

To support sustainability, Gen Z ranked sustainable energy, enabling a circular economy, and more sustainable public transport as the top three areas for governments to prioritize.

Asked for their views on where governments should prioritize investments to help close the digital divide experienced across different locations, demographics and socio-economic groups, Gen Z sees access to devices and connectivity for disadvantaged groups and connectivity in rural areas as the top priority.

Thinking about the digital services they expect to use in their 20s and 30s, Gen Z would like governments to invest in enabling access through connectivity and devices, digital healthcare, and digital access to central government services.

39% of Gen Z believe governments should prioritise the creation of circular economies



Given the importance that Gen Z places on the role of technology in the fight against the climate crisis, governments, schools, businesses, and those involved in fighting climate change should consult and collaborate with Gen Z, work towards building circular economies, and ensure that technology is being invested in and leveraged as part of this fight.

Policy Recommendation: Leverage Technology and Partnerships to Create Circular Economies

The public sector should lead this effort by utilizing energy-efficient, scalable technology (IOT, AI, Cloud) to help identify, analyze, and prioritize climate-impacting challenges within their communities, then work with the private sector to address the challenges together. Collaboration through sharing insights and supporting enterprises between public and private sectors will demonstrate sustainable development practices and goals.

ON DIGITAL SKILLS

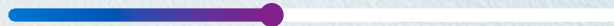


With digital skills gaps presenting a mounting challenge for global governments and industry sectors to address, **Gen Z wants sufficient provisions to be put in place to enable expanded learning opportunities both through education and as part of professional career opportunities.**

Gen Z recognizes the value of developing digital skills to help with their future careers and improve their chances of continuous employment. However, many said their education could have better prepared them with digital skills. Over two-fifths (44%) of respondents said that school only taught them very basic computing skills and around one-in-ten (12%) did not receive any education in technology or digital skills at all.

Collaboration and partnership between industry, schools and education-focused community organizations would help to better prepare future generations for the world of work.

44% of Gen Z generally feel as though both schools and businesses should work together to bridge the digital skills gap



Policy Recommendation: Bridge the Digital Skills Gap Through Innovative Partnerships & Programs

The public sector should partner with the private sector to expand existing technical and STEM training programs to different audiences. For example, Dell Technologies' Student Tech Crew has partnered with high schools throughout the world, leveraging an existing Dell Technologies technical certification program to prepare high school students to enter the workforce with demonstrable skills.

ON SECURING AND PROTECTING DIGITAL ECOSYSTEMS



With cybercrime on the rise, and having significant impact across many sectors and aspects of digital life, **Gen Z expressed strong support for robust legislations and investment in cybersecurity to protect national infrastructure.**

Asked how this should be achieved, Gen Z said that governments and businesses should work together and hold each other accountable.

Given that cybersecurity is a cornerstone of the digital ecosystem, it is crucial that global governments, industry partners and stakeholders work together to build a safe digital space for now and the future.

38% suggest a partnership between governments and business to build safe digital ecosystems



Policy Recommendation: Build Trust Through Transparency, Education and Partnerships

Governments should build trust and public awareness about cybersecurity through transparency, education and private sector partnerships built around best practice sharing.



SECTION 1:

SMART INVESTMENTS TODAY FOR RESILIENT ECONOMIES OF TOMORROW

- **Gen Z will inherit today's economic recovery efforts.** As public sectors around the world invest in transformations fit for the digital era, ensuring they are equipped with the right tech is vital. Smart technology investments will define the economies that flourish – and those that will falter.
- **Gen Z wants governments to accelerate digital investments** in cyber, devices, and connectivity to meet future economic and societal challenges.
- To develop trust and accountability, Gen Z wants **governments and the private sector to collaborate and build resilient economies for the future.**

GOVERNMENT RECOVERY INVESTMENTS:

Global governments will play a key role in unlocking and enabling the vast potential of digital transformation in the years ahead. The digital decisions and investments made today by governments will leave a lasting impact for Gen Z.

While 1 in 3 have low or no confidence in government investments leading to a flourishing digital economy in 10 years, a larger proportion are

unsure about what to expect, indicating that from a governmental standpoint, the pathway to gaining the confidence of Gen Z is very much open.

When reflecting on this finding, there is evident opportunity for governments to show Gen Z that they can invest well in their country's digital future.



TAKING A LONG-TERM ECONOMIC VIEWPOINT:

Our data suggests that nearly half of Gen Z is willing to accept short-term economic limitations for investment in a longer-term strategy that promotes green growth.

By clearly highlighting and communicating the longer-term benefits of green growth in policies, our findings show that support for a longer term, strategic investment approach, even with short term challenges would increase amongst the Gen Z cohort.

47%

of Generation Z would be willing to accept short-term economic limitations to enable policymakers to invest in a longer-term strategy that promotes green growth.

This acceptance is particularly high among those with confidence in public sector recovery investments, and particularly low among skeptics.

Our data aligns with findings from previous studies and emphasizes Gen Z's desire for governments to take increased action to tackle sustainability issues.

Data across multiple studies has identified Gen Z's desire for governments to focus investment in promoting sustainability and green growth:

- Deloitte's Global 2022 Gen Z & Millennial Survey found that just 11% of Gen Z agree that their country's government is highly committed to tackling climate change.¹

¹ Striving for balance, advocating for change: The Deloitte Global 2022 GenZ and Millennial Survey



PUBLIC SPENDING PRIORITIZATION:

Public services have been brought sharply into focus across the world following the onset of Covid-19. Generational cohorts are now more aware and have stronger views on investment priorities for governments.

Asked for their top three priorities to support economic growth, nearly half of respondents believe their government should focus on improving healthcare services and more than a third called for investment in education. Investing in sustainable / green infrastructure is the third action highlighted as an investment priority for governments.

Improving healthcare services remains the first-ranked priority across countries in our study, except for Mexico and Brazil who quote investment in education as more important (nearly 2 in 3 in Brazil) compared to other countries. Reducing national debt is a particular focus area in Italy, and Japan places higher emphasis on investing in digital inclusion and in digital infrastructure. Singapore favors investment in cybersecurity resilience.

SECTORAL INVESTMENTS:

Having seen healthcare services stretched during the pandemic,

55% of Gen Z believe that enhanced government investments in healthcare should be a top priority,



with education and energy the other sectors most quoted as requiring investment.

Looking at the global picture, public healthcare sector investment is the most-chosen priority for all locations included in the study and is particularly high in the UK (64%) and Brazil (79%).

The second-most chosen sector investment priority varies by country. Italy and Singapore chose helping Small & Medium Businesses, while those in the UK & France selected energy sector investments. Respondents in Japan selected Private Healthcare, with IT & communications the second-most selected sector for Korean respondents.



INVESTING IN SERVICES:

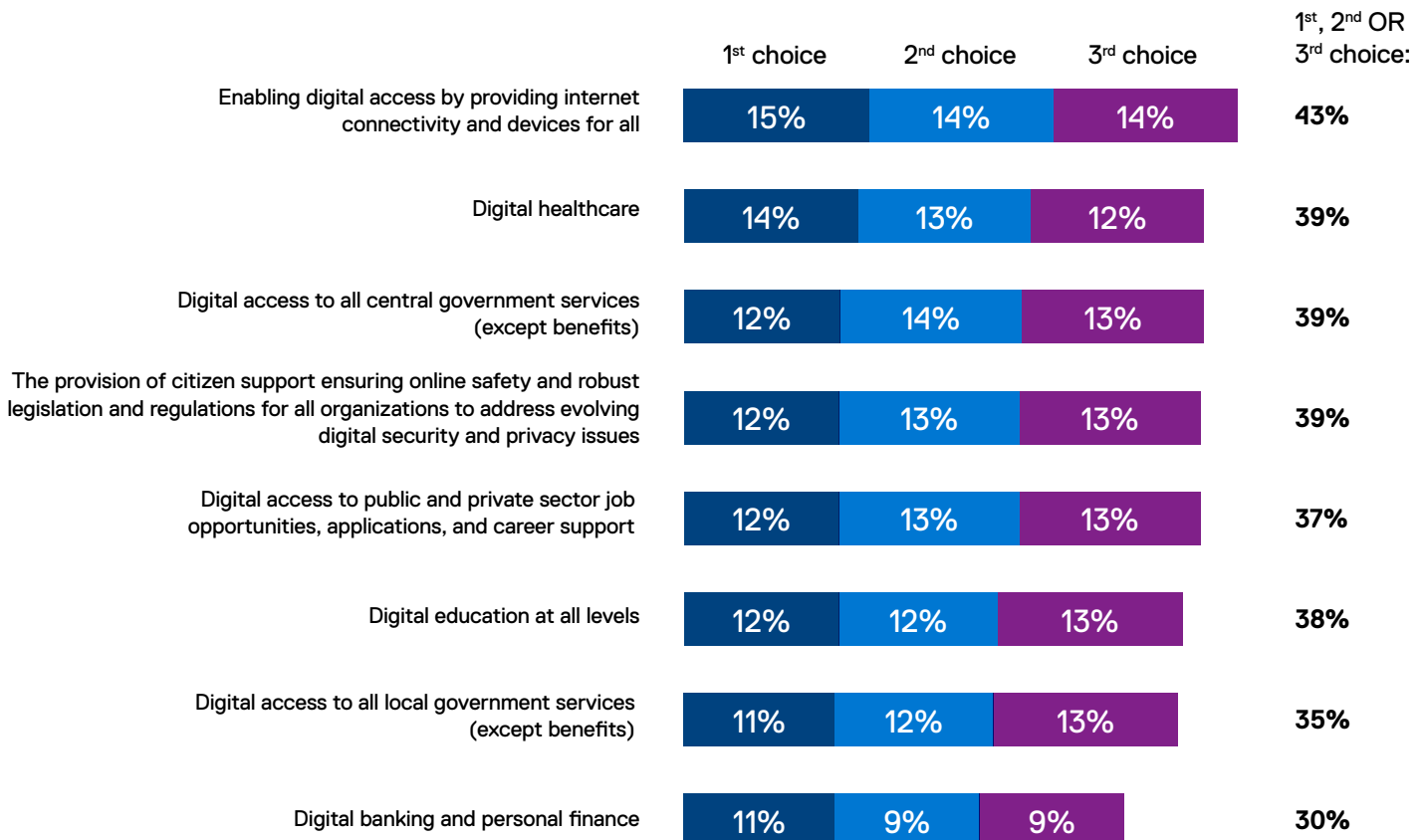
When looking at how government investments can improve digital experiences, 'enabling digital access by providing internet connectivity and devices for all' was amongst the top 3 priorities for 43% of respondents. Digital healthcare and digital access to central government services, and digital access to job opportunities attaining similar levels of buy-in (35-39%).

Digital banking and personal finance featured least often in respondents' top 3 (30%), perhaps because it is already perceived to be more advanced or is considered of lesser importance in relation to broader scale in public services.

When examining the global picture, digital healthcare ranks as the top investment area for the UK, New Zealand, and Canada. Banking tops the rank in Germany and central government services is the top priority for the USA and Australia. Singaporean respondents chose local government services.

Results reflect the divergence across countries and continents and highlights the importance of bespoke regional investments to enhance digital experiences for Gen Z in each location.

Which areas should see the most investment by governments to deliver secure and effective digital and/ or virtual experiences?





CYBERSECURITY AND NATIONAL INFRASTRUCTURE:

The role of cybersecurity in reducing vulnerability and mitigating digital threats is now well accepted. From Small and Medium-Sized Enterprises (SME) to national infrastructure, a strategic approach to cyber is paramount in a world where cyber-attacks are increasing and the protection of data is more critical than ever.

56% of respondents are for robust legislations and investment by governments in cybersecurity to protect national infrastructure.

Asked who they trust most to protect their data from cyber threats, amongst private, public sector or governments to protect their data from cyber threats, 25% said they trusted them equally while 17% said they didn't trust any. Of those that do not trust either private or government, 74% have had no formal training on cyber threats. With additional access to cyber education, increased trust in this area could be gained.

Support for government legislations and investment in cybersecurity to protect national infrastructure:

Yes, we need robust legislations and investment in cybersecurity

56%

No, cybersecurity legislation and investment is at the right level currently

14%

We need less legislation and investment. Individual companies and public sector organizations should set their own standards

14%

Unsure

16%



CYBER FINDINGS:



Nearly 1 in 4 of those who received no formal training on cybersecurity and safety do not trust private, public sector or government on cyber.



Gen Z is skeptical that any entity can protect their data from cyber threats with only 18% saying government bodies, ministries, and departments can. While 17% chose private sector companies and 25% said they trust both equally.

This finding also highlights the opportunity for public and private sectors to work together to achieve trustworthy and impactful results in cybersecurity.



The top concern in cyber threats amongst Gen Z relates to personal data or photos being shared.



Financial loss is the biggest cyber worry for Gen Z in Singapore, while blackmail by cyber criminals is of more concern in Korea. Japan ranked remarkably low regarding concerns for blackmail (19%).



Those who have received technology skills education are less worried about cyber threats that affect personal data sharing and finances than those who say they didn't receive education on this subject.



Like those citing a lack of adequate tech education, those who do not trust private or government systems worry more about cyber threats that affect personal data share and finance. This highlights the importance of education on how to protect from cyber threats and ensure online safety.

SECTION 2:

INDUSTRY SPOTLIGHTS

“Redefining transformation isn’t easy. Emerging technologies are transforming our world at blistering speeds and have ushered in huge opportunities, as well as their fair share of challenges.”¹

Unlocking the potential of digital transformation for many key industries and sectors is no longer an aspiration, but a necessity to future-proof, secure, and flourish in the years ahead.

Governments have a key role to play in enabling and maximizing that potential through infrastructures that support sectors in addressing challenges and realizing opportunities.



SUSTAINABILITY

Almost two thirds of Gen Z believe that technology will play an important role in the fight against the climate crisis, indicating that Gen Z recognizes the true value, and potential of technology in relation to addressing one of the biggest societal challenges in future decades.

To support sustainability, respondents ranked sustainable energy (42%), enabling a circular economy (39%) and more sustainable public transport (29%) as the top three areas for governments to prioritize. A quarter of respondents (25%) also expressed support for greater education for citizens so they can make more sustainable choices.

FUTURE OF WORK

The digital workspace is a mission-critical essential for the future of work (FOW). A flexible digital workspace enables workers to easily and securely access the applications and resources they need to do their jobs, no matter where they are or what device they are using. Gen Z perceives flexible and remote working as important considerations when choosing an employer (29%). However, 29% also see value in, or favor 9am-5pm office-based roles.

HEALTHCARE

When considering future healthcare provision, Gen Z’s most-chosen concern was gaining access to healthcare appointments and treatments in a timely fashion. Gen Z also cite the potential poor quality of these services as a concern.

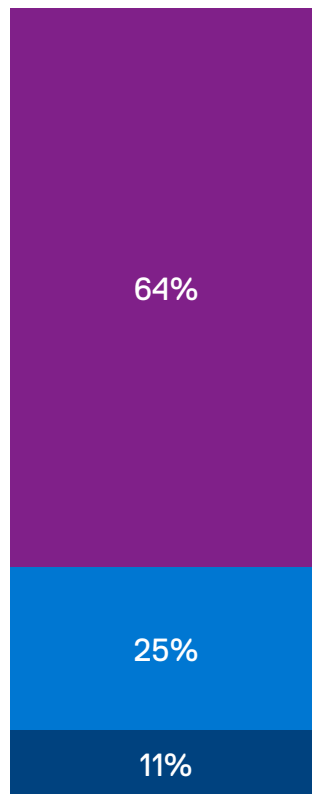
Long wait times have been the primary factor causing Gen Z to put off making a health appointment within the last 2 years (38%). Long phone queue times (24%) and the inability to book appointments online (21%) were also cited as key reasons.

Over half of Gen Z (57%) have low or neutral confidence in their personal data being stored compliantly by healthcare providers, indicating that more should be done to reassure them that sufficient data protection is in place.

¹ Dell Technologies Digital Transformation Index, 2022.

Importance of the role of technology in the fight against the climate crisis:

- Not important
- Neutral
- Important



SUSTAINABILITY DEEP DIVE

Almost two thirds of Gen Z believe that technology will play an important role in the fight against the climate crisis.

The importance of the role of technology in fighting climate change is identified most strongly amongst those willing to accept short term economic limitations for longer term green investment (79%).

Those stating higher confidence in public sector recovery investments (77%) also identify higher importance regarding technology's role in fighting the climate crisis.

At the country level, Italian respondents were most likely (88%) to identify the importance of the role of technology in fighting the climate crisis, while those asked in Japan were least likely (42%).

Across locations, there is evident variance in the importance of the role of technology, with a possible need to provide educational information on its potential as a catalyst to support climate action, locally and globally.

In applying our findings to meet the expectations and priorities of Gen Z, sustainability efforts should center on both mitigating emissions from energy, by offering more sustainable solutions, and working towards creating circular economies.

While the drive towards investing in sustainable energy solutions has been apparent for many years now, Gen Z's prioritization of a circular economy is particularly notable, as we typically see less media 'buzz' generated around this topic.

Italy shows the greatest support for prioritizing investments in both the circular economy and sustainable energy, with Germany and Netherlands placing less importance on these investment options.

In the USA, Gen Z see the prioritization of a circular economy as key, while in the UK, strong prioritization is placed on sustainable energy.

HEALTHCARE DEEP DIVE



Gen Z is most concerned about gaining access to adequate healthcare services in a timely fashion, followed by the quality of these services and patient safety.

The desire to see a doctor face-to-face is viewed as a higher priority in the UK and Canada than other regions, potentially highlighting that digital healthcare provision in these locations requires improvement.

Only 6% of Gen Z rank getting face-to-face appointments as their greatest concern for healthcare provision, potentially indicating digital healthcare provision is already an accepted norm.

Concern over wait times for appointments and treatment was most apparent in Spain and Italy, while worries surrounding poor quality of healthcare is the top concern for Mexico and Brazil.

Governments should target efforts to reduce wait times for appointments and to increase the quality of healthcare, potentially by applying more digital healthcare provisions to ease demand for face-to-face appointments.

Asked what has caused them to put off making an appointment in the last two years, long wait times for appointments and long phone queues were the top responses.

Healthcare providers could look to digital services like appointment systems and remote consultations to help increase the likelihood of Gen Z gaining timely medical treatments.

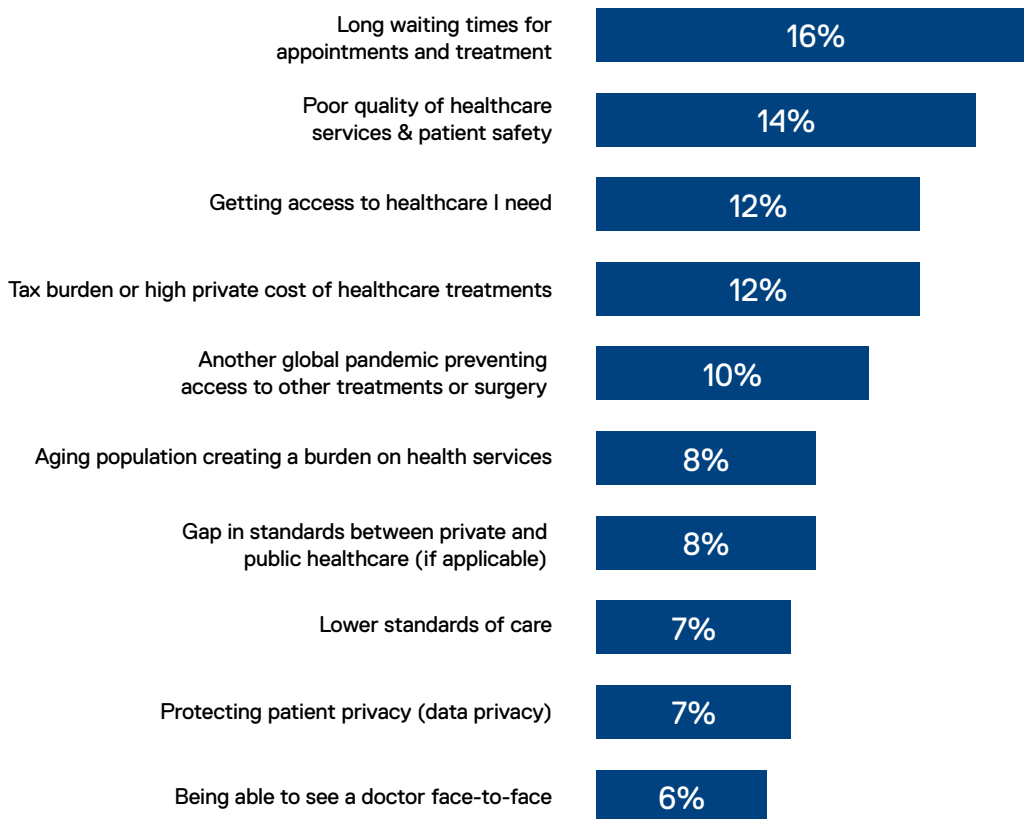


Over half of Gen Z have low or neutral confidence in their personal data being stored compliantly by healthcare providers.

This suggests that there is a need for governments to educate and reassure Gen Z surrounding health data protection, particularly in Japan, France, and Korea.



What is your greatest concern for future health services provision?





FUTURE OF WORK DEEP DIVE

At Dell Technologies, we believe work is not tied to where you are but what you do. To build a productive and inclusive ‘work from anywhere’ culture, leaders need to invest in people, processes and technologies. Digital innovation is continuing to transform the world of work, providing organizations and their leaders with the opportunity to deliver agility, flexibility, and resilience into the workplace. As a result, we can leverage new technologies for a more productive and inclusive hybrid workplace.

The digital workspace is a mission-critical essential for the future of work. A superior digital workspace enables workers to easily and securely access the applications and resources they need to do their jobs, no matter where they are or what device they are using.

But flexible and remote work as part of the ‘future of work’ is about more than just technology and access to devices. It’s about culture and empowerment.

Asked about considerations when choosing an employer, our findings show:

- While flexible and remote working are important and a consideration for Gen Z when choosing an employer (29%), few view this as critical (8%)
- Almost 1 in 5 recognize the value of flexible and remote work, but favor a 9–5pm office-based structure

Data from previous studies (across a variety of ages) identify higher levels of support for remote and flexible working than seen within Gen Z, supporting findings that show while flexible work is valued (37%), many also favor the 9am–5pm office based model (29%).

Data across various studies has shown that Gen Z exhibit a stronger desire to work in an office environment than older segments of the workforce:

- A 2021 Hubble study indicated that Gen Z reported notably higher levels of neutral or negative experiences working from home (36%) when compared with Millennials (29%) and Gen X & Baby Boomers (28%).¹
- Further data from the study indicated that 21% of Gen X and Baby Boomers would like to work remotely every day, with this figure at just 7% for Gen Z.
- A 2021 McKinsey study identified that 63% of employees (across all ages) favor a hybrid or remote working model. This is considerably higher than the 55% of Gen Z identifying the importance of flexible/ hybrid working in Dell’s 2022 study.²

In order to effectively attract talent, employers should seek to offer a range of flexible working options, alongside technology resources, particularly remote access to files, cloud resources and high-speed connection both remotely and in the office.

When asked about the most important tech consideration when deciding to take a new job, robust data protection and cyber-security is desired most strongly in Korea and Mexico, with almost 1 in 4 identifying this as the most important factor.

Employers within these markets should seek to provide sufficient reassurance around such issues when recruiting talent.

¹ Hubble, Why Gen Z and Millennials Prefer the Office to Gen X and Baby Boomers, November 2022

² McKinsey, What employees are saying about the future of remote work, April 2021.



SECTION 3:

MASTERING OUR DIGITAL FUTURES: EQUIPPING THE NEXT GENERATION WITH SKILLS THEY NEED TO SUCCEED

By plugging the skills gap and delivering on the infrastructures required for the economies of the future, public sectors can leverage essential digital transformation to drive human progress.

- Having joined the workforce at a time of significant technological change, Gen Z believe that providing access to devices and connectivity for both disadvantaged groups and rural areas is key to closing the digital divide for future generations.
- Gen Z don't think that schools, on their own, are able to adequately prepare them for the world of work, so there is a need for schools, community organizations and businesses to work together to help bridge the digital skills gap and prepare future Gen Z generations for the world of work.
- Gen Z recognize the value of acquiring new digital skills to help with their future career prospects, and there is an opportunity for governments, schools, and corporations to offer a platform to facilitate this hunger for learning

and development. Governments should invest in digital education to meet the needs of Gen Z and the demands of industries. Gen Z believe that improving accessibility and quality of technology courses and education across all levels should be prioritized to encourage students to choose a career in technology.

- Society is changing and we need to reimagine our relationship with the world and each other –and ensure we're empowering everyone through digital access to flourish in the future.
- It's time to match access to tech, with skills, and continuous learning to future-proof and prepare our workforces of tomorrow.

“Across the education sector, demand for hybrid learning experiences is increasing, as is the need for schools to equip teachers and students with the resources they need to deliver better learning outcomes.”¹

¹ <https://www.delltechnologies.com/en-gb/industry/education/index.htm#cobrand=intel>

44%

say that businesses and schools should work together to bridge the digital skills gap



“Our partnership with UNICEF USA and Giga is a step toward our digital inclusion mission to getting technology, skills, and networks in the hands of those who need it most, creating a path towards digital equity for future generations.”

Cassandra Garber, VP of Environmental, Social and Governance at Dell Technologies.

Bridging the digital skills gap must be a collaborative effort. Over two fifths (44%) of Gen Z felt that businesses and schools should work together to bridge the digital skills gap. Our findings show, Gen Z doesn't think that schools, on their own, are able to adequately prepare them for the world of work, so there is a need for schools, community organizations and businesses to work together to help bridge the digital skills gap and prepare future generations for the world of work.

Two-fifths (40%) of Gen Z consider learning new digital skills as essential to ensuring future career options. Over a third (36%) also plan to keep acquiring new digital skills to ensure continuous employment.

At a national level, Singapore identifies the greatest responsibility for public and private sector collaboration to bridge the digital skills gap, followed by Australia. Whilst the Netherlands and Italy place comparatively less focus on collaboration as a priority and greater emphasis on schools delivering in this area.

Over a third of Gen Z felt that their school education (under 16) did not prepare them with the technology skills needed for their planned career, with over half (56%) receiving either very basic or no digital skills

training. Our findings show a strong requirement for governments to assess the suitability of the curriculum to align with economies of the future.

There is notable variance across locations regarding provision of technology skills education, with high levels of education cited in Mexico, Singapore and the Netherlands, and considerably lower levels in Brazil, France and Italy.

Governments should target efforts to increase technology skills in educational settings to ensure the future success of the workforce.

Levels of education regarding key topics including rights as a digital citizen, how to protect personal data, and how data is managed in the cloud vary considerably between locations, with the highest levels of education reported by Singapore, and the lowest levels in Brazil.

Gen Z recognizes the value of acquiring new digital skills to boost their future career prospects, with over a third planning to continue to acquire skills.

There is an evident hunger amongst Gen Z to continue developing new digital skills and learning. Governments, schools, and corporations should seek to offer a platform to facilitate this development, that will benefit all sections of modern societies.



DRIVING SKILLS THROUGH IMPACT

With the skills gap remaining a growing challenge for governments and industries, there is a need to ensure sufficient provisions are in place to enable ongoing learning opportunities on digital skills and literacy.

Governments should invest in digital education to meet the needs of Gen Z and demands of industries of the future.

Learning new digital skills is perceived as particularly essential in boosting future career prospects in Brazil, Mexico and Italy.

Respondents based in the Netherlands see comparatively strong levels of satisfaction with their current digital skills, and a belief they will not need to acquire new skills.

Gen Z believe improving accessibility and quality of technology courses and education across all levels should be prioritised to further encourage students to choose a career in technology.

40% of Gen Z see learning new digital skills as essential to future career options.





SECTION 4:

Conclusion

As global economies and societies look to rebuild and future-proof following a tumultuous and testing period, our next steps must be informed and shaped by the generation upon whom much of the burden of future responsibility will fall.

On the topics that matter most – the global economy, the future of the planet and the health of its people – Generation Z’s answer is striking: Technology must play a central role. And, for a digital-first sustainable future, Gen Z is willing to be patient, accepting short-term economic limitations for a more stable future.

This research shows that Gen Z is willing to sacrifice their today for a better tomorrow. The actions taken by public and private entities will help drive toward the ultimate goal — a future where Gen Z, and the generations that follow, can benefit from a more equitable, inclusive, and future-facing society.

GEN Z’S CALLS TO ACTION

- Make sustainability a mandate, not an afterthought
- Provide a variety of flexible work arrangement options
- Improve digital skill education
- Close the digital divide and democratize access to digital services
- Provide more transparency in investments and decision making to increase trust and confidence

Future-Proof Contributions

FUELING DIGITAL ADVANCES IN THE 5G ERA

Customer Profile

DELLTechnologies

Fueling digital advances in the 5G era

Verizon Business allows organizations to benefit from lightning-fast data processing at the edge.



Across industries, Verizon Business customers take advantage of edge computing with 5G connectivity, running on a Dell Technologies infrastructure. They find new ways to thrive, compete and serve customers as they re-create and streamline their operations.

Verizon was the first telecommunications provider to launch 5G services, which are practically without latency and much faster compared to earlier connectivity standards. Verizon's 5G enables peak data rates of 10 Gbps and supports up to 1 million connected devices per square kilometer. It allows devices to move up to 310 miles per hour and remain connected.

Transformations



Delivers data and applications at unheard-of speeds.



Enables organizations to break new ground as they create value, grow and compete.

Customer profile

verizon✓

Information Technology & Services | United States

Outcomes



Drives near real-time decisions and actions based on data intelligence.



Makes it possible to tackle issues once considered unsolvable.



Supports fast, insight-driven, high-value innovation.



Brings agility, intelligence, transparency and efficiency to business processes in many industries.

Future-Proof Contributions

HELPING GLOBAL ORGANIZATIONS REDUCE THEIR CARBON FOOTPRINTS

Customer Profile

DELLTechnologies

Helping global organizations reduce their carbon footprints

Hark enables companies to improve their buildings' energy efficiency with a cloud-based IoT offering built with Dell Technologies OEM Solutions.



Hark.

Hark | Energy | United Kingdom

Business needs

To facilitate rapid growth and meet customers' disparate requirements, Hark needed an original equipment manufacturer (OEM) provider to help design, build and distribute edge gateways that could operate in all types of environments and communicate with a range of devices such as industrial furnaces, air conditioners, microgrids and solar panels.

Solutions at a glance

- [Dell Technologies OEM Solutions](#)
- [Dell Edge Gateways for IoT](#)
- [Hark Energy and Asset Monitoring](#)

Business results

- Boosts buildings' energy efficiency and reduces carbon footprint.
- Saves one customer £1 million (\$1.38 million) in energy and asset costs over 1 year.
- Enables one customer to save enough energy in 1 month to power the equivalent of 800 homes for a year.



“By providing smart energy controls and partnering with Dell Technologies OEM Solutions, we help more companies understand how their buildings operate.”

Jordan Appleson
CEO, Hark

Future-Proof Contributions

ENERGY-EFFICIENT SUPERCOMPUTING HELPS DRIVE BREAKTHROUGH RESEARCH

Customer Profile



Customer profile



UNIVERSITY OF
CAMBRIDGE

Higher education | U.K.

Energy-efficient supercomputing helps drive breakthrough research

The University of Cambridge and Dell Technologies collaborate to support advanced and sustainable research through a reduction in power consumption and carbon-neutral energy innovation.



By providing powerful, energy-efficient supercomputing to scientists and organizations, the University of Cambridge enables breakthroughs in innovation that rely on AI, analytics and simulations performed on increasingly large data volumes. This helps to support the U.K.'s green energy ambitions, through state-of-the-art computational resources and the design of carbon-neutral fusion technologies.

Transformations



Delivering advanced technology and powering human progress with minimal environmental impact.



Enabling cross-industry collaborations and sustainable scientific research.

Outcomes



Achieves the best possible ratio of scientific output to energy consumption.



2x energy efficiency, 5x the simulations capability and 20x faster AI performance.



Eases the adoption of supercomputing for new entrants.



Provides a model for academic and industry collaboration to support the UK's green energy ambitions.

Future-Proof Contributions

HOSPITAL IMPROVES PATIENT OUTCOMES WITH DIGITAL HEALTHCARE PLATFORM

Customer Profile



Customer profile



โรงพยาบาลรามคำแหง
Ramkhamhaeng Hospital

Healthcare | Thailand

Hospital improves patient outcomes with digital healthcare platform

Patient services at Ramkhamhaeng Hospital gain strength with Dell Technologies, increasing the quality of healthcare at a critical time.



Outcomes



Reduces time patients spend at hospital during appointments from 3 ½ hours to 2 hours.



Gains nearly 100% uptime.



Ensures critical patient data is protected with automated failover.

Ramkhamhaeng Hospital wanted to start providing clinicians with more mobile access to patient data. And when the COVID-19 pandemic struck, the hospital's need for a solution to support remote patient consultations was accelerated. With Dell Technologies, Ramkhamhaeng Hospital was able to meet all of its goals, implementing a digital health platform that gives clinicians flexible access and telehealth capabilities while maximizing uptime.

Transformations



Gains modernized infrastructure that supports new service delivery models, such as telehealth.



Enables 2,000 clinicians to access patient data remotely using desktop and mobile devices.



Prevents disruption with data replication from the edge to the on-premises core and cloud.