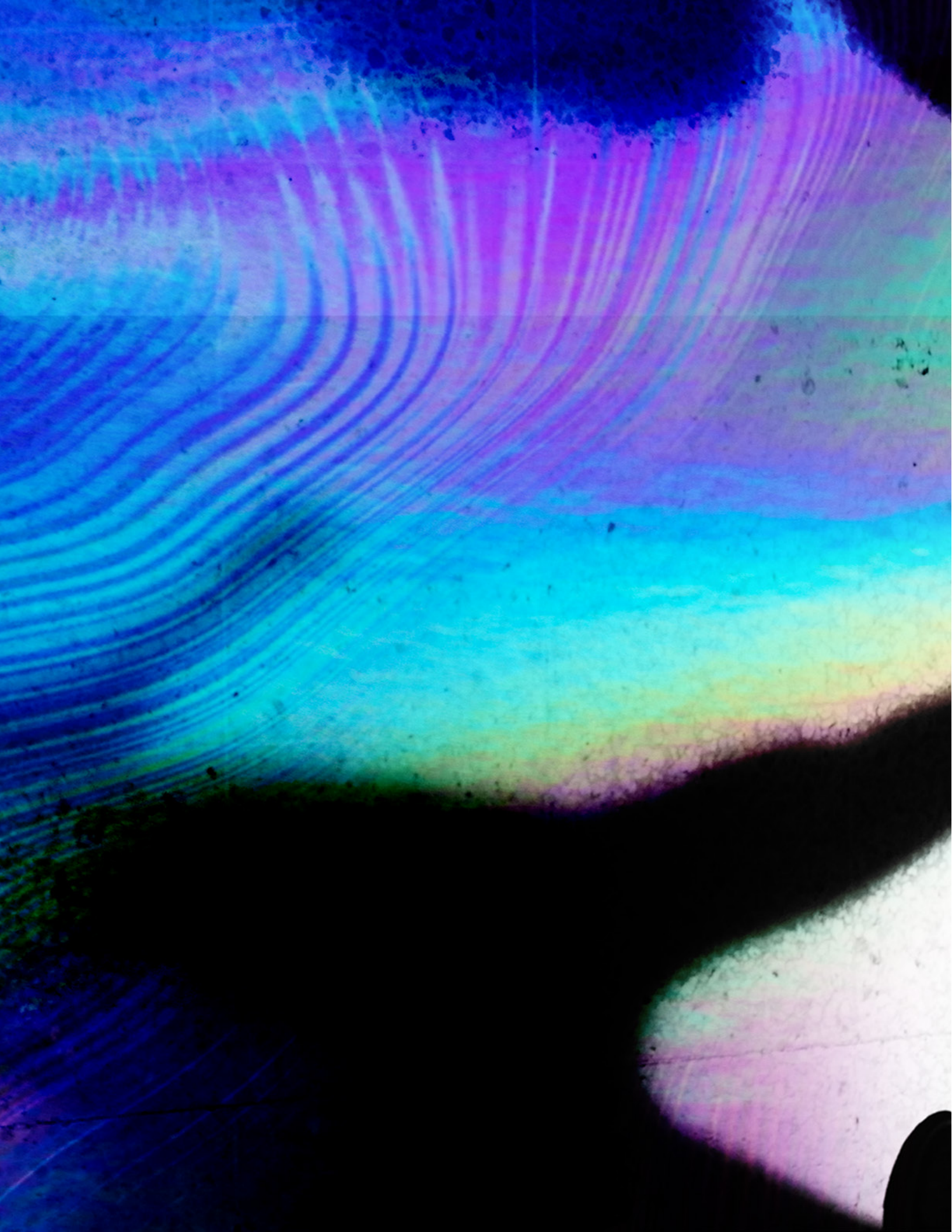
2025 科技趨勢

此份報告由勤業眾信
聯合會計師事務所發行

Deloitte.
Insights

目錄

(本內容為摘錄整理版，完整內容謹請參閱原文報告)



趨勢追蹤

	INTERACTION		INFORMATION		COMPUTATION		BUSINESS OF TECHNOLOGY		CYBER AND TRUST	CORE MODERNIZATION
2025	Spatial computing takes center stage		What's next for AI?		Hardware is eating the world		IT, amplified		The new math	The intelligent core
2024	Interfaces in new places		Genie out of the bottle		Smarter, not harder		From DevOps to DevEx		Defending reality	Core workout
2023	Through the glass		Opening up to AI		Above the clouds		Flexibility, the best ability		In us we trust	Connect and extend
2022			Data sharing made easy		Blockchain: Ready for business	Cloud goes vertical	DEI tech: Tools for equity	The tech stack goes physical	Cyber AI	IT, disrupt thyself
2021	Rebooting the digital workplace	Bespoke for billions	Machine data revolution	ML Ops: Industrialized AI			Strategy, engineered	Supply unchained	Zero trust	Core revival
2020	Human experience platforms		Digital twins				Finance and the future of IT	Architecture awakens	Ethical technology and trust	
2019	Intelligent interfaces	Beyond marketing	AI-fueled organizations		NoOps in a serverless world		Connectivity of tomorrow		DevSecOps and the cyber imperative	
2018	Digital reality		Enterprise data sovereignty		API imperative	Blockchain to blockchains	No-collar workforce	Reengineering technology		The new core
2017	Mixed reality		Dark analytics	Machine intelligence	Everything as-a-service	Trust economy	IT unbounded	Inevitable architecture		
2016	Internet of Things	AR and VR go to work	Industrialized analytics		Democratized trust		Right speed IT	Autonomic platforms		Reimagining core systems

Note: To learn more about past Tech Trends, go to www.deloitte.com/us/TechTrends

Source: Deloitte analysis.

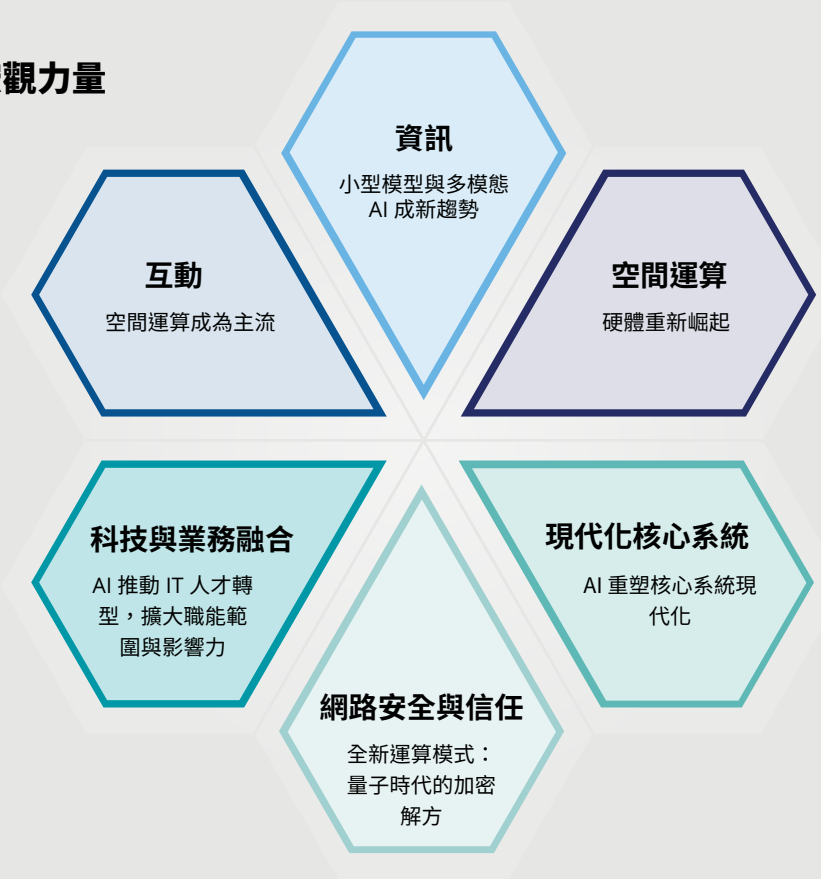
摘要

《科技趨勢》作為 Deloitte 的重要科技洞察報告，將從宏觀科技力量的角度，深入探討科技趨勢發展，並依影響範疇分類為三大推動力（互動、資訊、運算）與三大基礎支柱（科技與業務融合、網路安全與信任、核心系統現代化）（請參閱圖 1）。

在總結本報告時，Deloitte 技術長辦公室團隊深刻了解到，AI 已成為貫穿所有趨勢的共同元素。本報告預測，AI 在未來將深度融入企業營運與日常生活，成為無形卻不可或缺的科技。

圖1

資訊科技六大宏觀力量



互動

空間運算成為主流

空間運算因具備打破資訊孤島之能力，且能為員工與顧客提供更加直覺的資訊互動模式，而得以持續吸引企業之關注。目前，已有許多企業在實際案例上取得成功，例如透過高階模擬技術測試不同應用場景，藉此評估各項條件如何影響業務營運。

而隨著企業進一步聚焦於高效管理空間資料，組織將得開發更具前瞻性的應用。在未來幾年內，AI 的進步將使空間運算體驗更加流暢，並有望提升系統互通性，最終讓 AI 代理（AI Agent）能夠預測並主動滿足使用者需求。

資訊

小型模型與多模態 AI 成新趨勢

隨著生成式 AI 持續帶動熱潮，許多企業為充分運用其優勢，皆導入大型語言模型（LLMs）以協助優化各式應用場景。然而，有部分企業則已開始放眼未來。儘管 LLMs 具有廣泛的適用性，但其未必能解決所有企業的需求。

因此，有些企業目前正考慮採用小型語言模型與開源解決方案，以便在規模較小卻更精準的資料集上訓練大型語言模型。此類新型態 AI 結合多模態模型與 AI 驅動的模擬技術，不僅能回答使用者的問題，更能進一步完成指定任務，協助企業得以「針對個別任務選擇最適合的 AI」。

未來，企業對於 AI 應用深度與執行力的需求將推動代理型 AI（Agentic AI）的新時代，並重塑工作與生活體驗。

空間運算

硬體重新崛起

在歷經長期由軟體主導的時代後，硬體正重新成為焦點。隨著 AI 對專用運算資源的需求增加，企業紛紛轉向採用先進晶片來支援 AI 工作負載。此外，搭載 AI 晶片的個人電腦可顯著提升知識工作者的工作效率，使其能夠在離線環境下使用 AI 模型，同時確保技術基礎架構與時俱進、降低雲端運算成本並強化資料隱私保護。

儘管 AI 的高耗能為永續發展帶來挑戰，但能源資源與效率的進步也讓 AI 硬體不再遙不可及。展望未來，AI 將深度整合至各類裝置中，為物聯網與機器人技術帶來革命性的影響，並透過更加智慧化的裝置推動產業轉型。

科技與業務融合

AI 推動擴展科技 IT 人才轉型
擴大的職能範圍與影響力

多年來，科技領域致力於邁向精簡化與「一切即服務」（Everything-as-a-Service）的發展模式。IT 部門一直以來都是企業內部數位轉型的關鍵，如今更全面擁抱 AI 轉型。

生成式 AI 在程式開發、軟體測試與強化科技人才能力等領域應用，正在改變企業的技術發展模式，促使技術領導者加速推動基礎建設、工程、財務營運、人才發展與創新轉型。隨著傳統 AI 與生成式 AI 的持續進步，技術發展將從「人類主導」逐步轉向「人機協作」。最終，透過公民開發者（Citizen Developers）與 AI 驅動的自動化技術，將加速邁向新型態的精簡模式（Lean IT）。

網路安全與信任

全新運算模式：量子時代的加密解方

在應對千禧年危機（Y2K）時，企業因及時採取應對措施而成功化解其中風險。如今，科技領域正面臨全新挑戰，因此企業需積極展開應對。

專家預測，量子電腦可能在未來 5 至 20 年內趨於成熟，其能夠破解現有加密技術與數位簽章，將對網路安全造成重大影響，進而威脅到數據與通訊的完整性及可靠性。

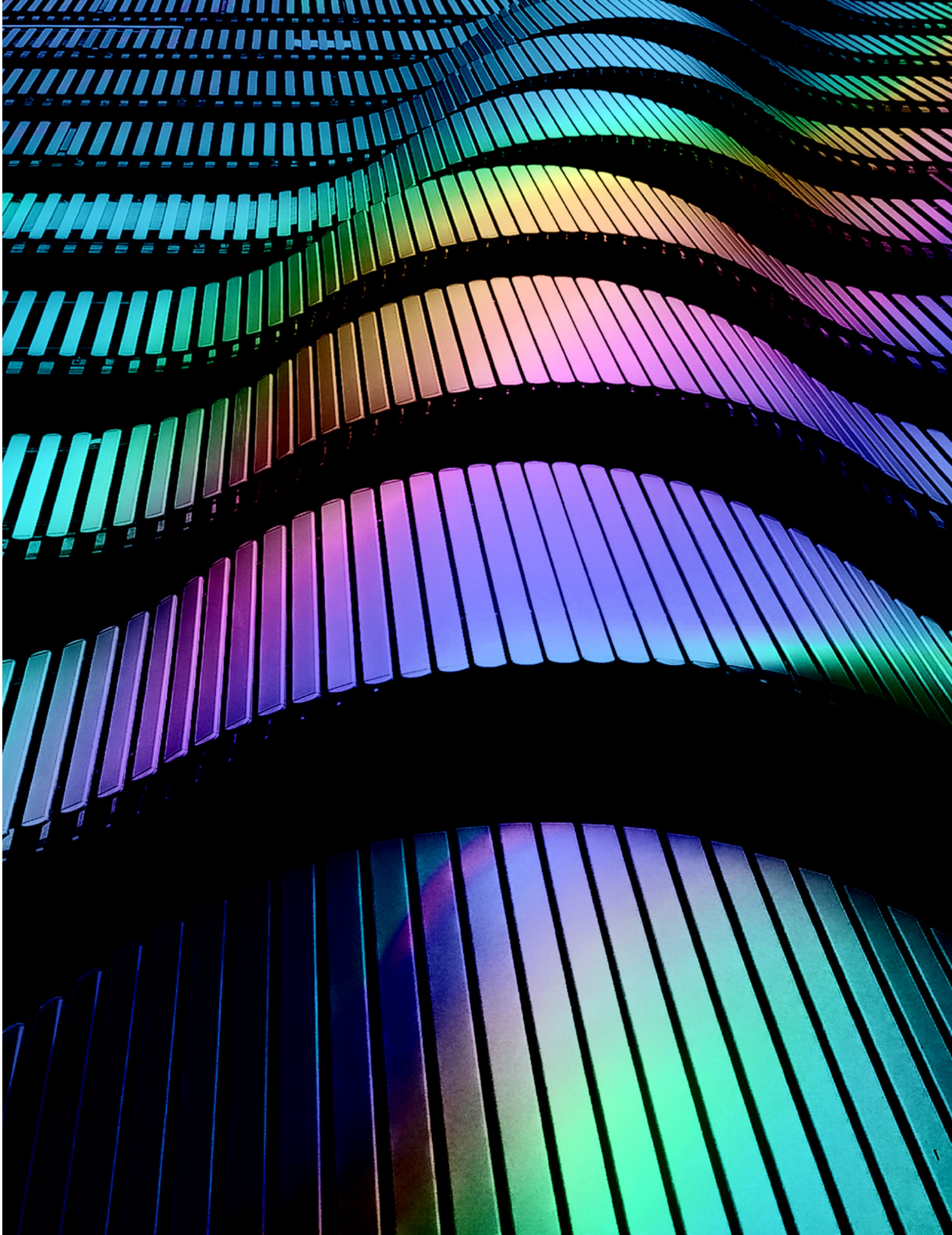
然而，其實際發展進程仍存在不確定性，後量子加密技術（Post-quantum Encryption）的重要性卻也不容忽視。新興的加密標準將有助減緩相關風險，雖然更新加密手法相對簡單，但也較為耗時，因此企業組織應在潛在威脅出現前盡快採取行動。此外，針對其他與網路衛生（Cyber Hygiene）及加密靈活性等相關問題，也需一併納入考量並妥善解決。

現代化核心系統

AI 重塑核心系統現代化

核心系統供應商正積極投資 AI，讓產品和服務更加智慧化，而企業也紛紛將 AI 深入整合至系統中，以提升競爭力。這不僅讓日常工作自動化，更是從根本重新思考與設計流程，使系統更加智慧化、高效且具前瞻性。

由於 AI 整合的過程相當複雜，企業必須進行周詳規劃、針對技術與人才進行策略性投資，並建立穩健的治理架構，方能確保運作順暢。然而，企業也需留意「自動化悖論」（Automation Paradox），即隨著系統的複雜程度提升，人力的角色反而變得更重要。雖將 AI 整合進系統能簡化使用者體驗，惟系統架構也將愈發複雜，因此在管理系統時，仍需高度依賴專業技術以確保穩定與高效運行。



前言

AI 無所不在：源自演算法的強大能力

《2025 科技趨勢》揭示 AI 如何深植我們的日常生活，打造更加智慧化、迅捷且直覺的世界。

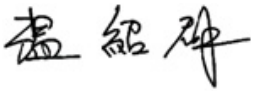
在過去兩年，AI 已迎來多項突破，並持續改變企業的營運模式與決策方式。我們正邁入「AI 無所不在」的時代，AI 不再只是輔助工具，而是驅動企業成長與創新的關鍵動能。如何讓 AI 無縫融入業務流程、優化使用者體驗，並推動組織的長期發展，已成為企業當前的重要課題。然而，AI 的廣泛應用也帶來決策透明度、數據安全與內容可信度等挑戰，企業必須強化 IT 基礎建設、數據治理與整體戰略，以提升 AI 的適應性與韌性，確保 AI 能夠穩健運作，進而支撐企業的長期競爭力。

根據 Deloitte 最新發布的《2025 CxO 前瞻展望：AI 價值實踐，企業決勝關鍵》報告指出，AI 已不僅是技術上的創新，更成為決定企業競爭力的核心動力。台灣企業面對的挑戰不僅止於技術導入，還涉及政策法規、人才培育、算力需求、數據治理與創新應用的多重考驗。然而，台灣在全球 AI 競爭中擁有強大的優勢，憑藉領先的半導體產業，若能進一步推動軟硬體整合，將有機會大幅提升競爭力，甚至在全球 AI 版圖中占據關鍵地位，真正實現「AI 即國力」之願景。

然而，AI 的普及也驅動企業內部 IT 架構的深度轉型，影響 AI 應用的廣度與深度。因此，企業決策者與高階主管應更積極評估 AI 如何重塑技術基礎，確保在新一波科技變局中維持競爭優勢。在變化快速的市場環境下，企業不僅要因應即時挑戰，更需掌握長遠方向，使科技布局與業務發展能夠同步推進。

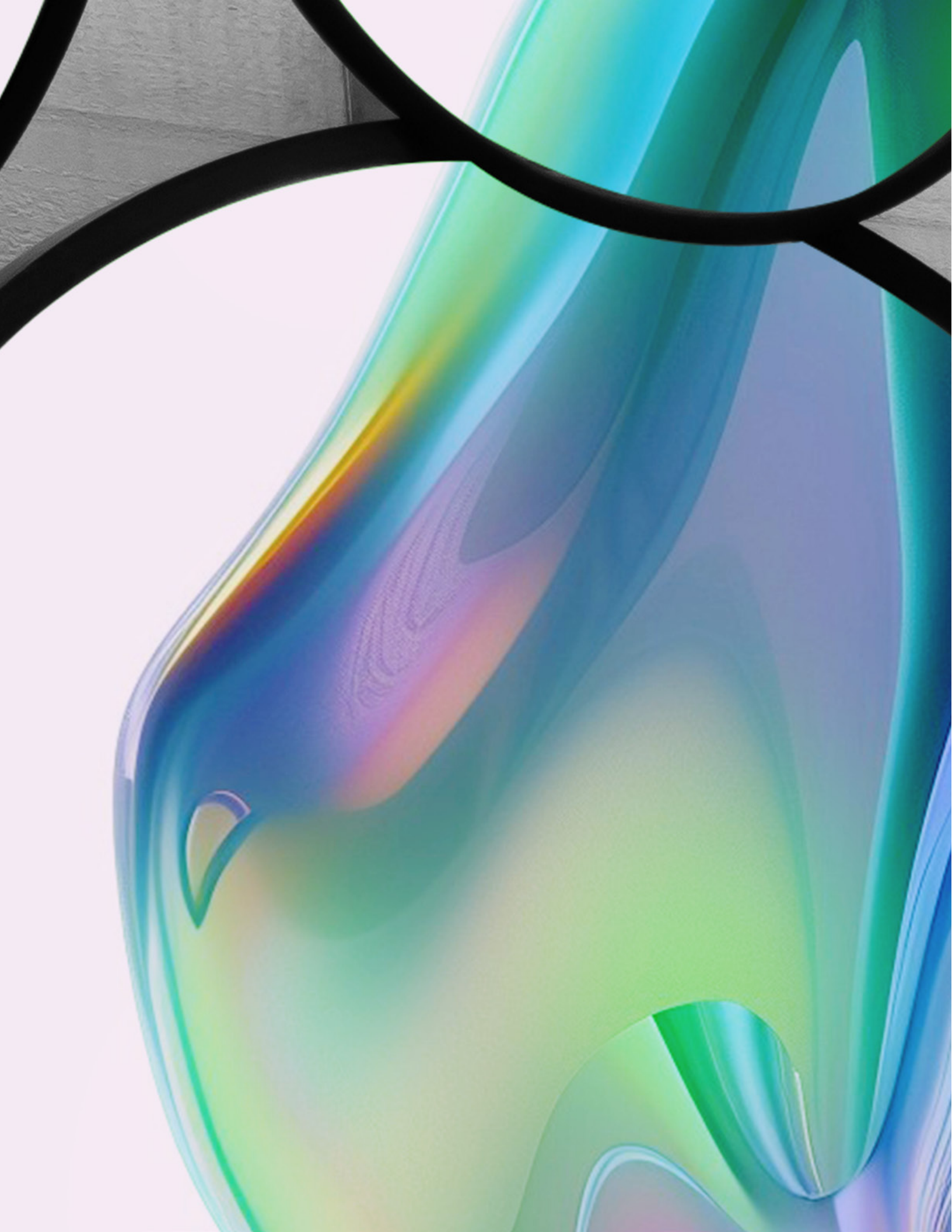
鑑於此，Deloitte 每年發布的《科技趨勢》報告，致力於深入剖析影響企業創新與成長的關鍵科技。今年的主題更是聚焦於未來產業變革將由 AI 與多項科技的融合驅動。例如，微軟近期推出的全球首創量子晶片，有望重塑運算架構並加速 AI 發展。這意味著，科技競爭將從「單點轉向協同」，進而加速推動各產業邁向新紀元。

我們正處於變革的臨界點，而這場科技競爭才剛剛開始。透過本次《2025 科技趨勢》，我們將與您一同探索未來，掌握關鍵機遇，迎接 AI 所帶來的新時代！



勤業眾信聯合會計師事務所

溫紹群 數位轉型服務負責人



綜整重點

廣度即深度：智慧交融，創新加倍

在界限日益模糊的時代，企業應主動探索跨產業與科技的策略性交融，藉此激發創新、突破框架，開創全新可能。

Mike Bechtel 與 Raquel Buscaino 共撰

顧問界經常運用 MECE 架構來分析與解決問題，這種方法強調將問題拆解為「相互獨立」(Mutually Exclusive) 的任務，同時涵蓋所有必要面向，使整體解決方案「互無遺漏」(Collectively Exhaustive)，如此一來，問題將能被更有條理地處理與解決。

然而，現今的世界正邁向高度整合，而 MECE 原則並無法適用於所有問題，本報告的六大科技趨勢之章節亦能證明此點 (謹請參閱原文報告)。儘管本報告將六大趨勢區分為獨立章節，但其絕非各自獨立、毫無關聯；如今的科技、組織與產業也早已不再截然分明。

相反地，傳統的產業分工、區隔與專業化的界線正被錯綜複雜的網絡所取代——不同領域間開始出現「意想不到的交匯」。舉例來說，區塊鏈與生成式 AI 相整合之後，可用來識別與防範深偽技術等合成媒體的濫用；或是太空科技與生技產業的攜手合作，試圖減輕太空人長期於太空旅行的影響。

長期以來，企業一直都是依賴創新來開發新的營收來源、透過併購創造綜效，並藉由建立策略性合作夥伴關係來促進成長。如今，企業應更加主動且有意識地投入此類拓展策略。實務經驗顯示，產業與科技的融合將是未來成長與獲利的關鍵動力。這種融合有助於企業掌握兩大關鍵洞察：

1. 深入了解鄰近產業的研發動向，掌握可能會影響企業未來發展的關鍵技術。
2. 釐清如何整合不同技術，以發揮 1 + 1 > 2 的效益。

接下來，本報告將深入探討上述兩大關鍵洞察。

產業交融：跨越邊界，探索新機遇

賽博龐克流派的科幻作家威廉・吉布森 (William Gibson) 曾說過一句廣為人知的名言：「未來已經來臨，只是尚未普及。」[1]

儘管這句話或許聽來老生常談，但放在現今來感受，卻比以往任何時候都更具啟發性，並更是藉此間接提醒了企業領導者，下一個重大突破或許已經存在於另一個產業、地區，甚至競爭者手中。

以太空與生技產業為例，這兩者之間看似沒什麼交集，但實際上並非如此。太空獨特的微重力環境能夠使藥物原料在製造過程呈現更均勻的狀態，進而提升品質 [2]。

雖然在微重力環境中生產藥物聽起來像是異想天開，但此想法其實早已不再僅是理論而已：禮來 (Eli Lilly) 與默克 (Merck) 等製藥公司早已開始投資這一領域 [3]。若生物製藥企業尚未將太空產業視為潛在合作夥伴，則可能會錯失關鍵突破，而這些發現或許將直接影響其核心業務。

其他產業融合的案例亦證明了跨界合作對於發掘創新解決方案的重要性。例如，汽車巨頭豐田與三菱重工正與太空機構合作，共同打造出月球探測車[4]；服飾品牌 lululemon 則攜手生技公司 LanzaTech 及 Samsara Eco，致力於開發更永續的布料[5]。此外，Uber 的餐飲外送業務如今已占其總營收的三分之一[6]，而電商巨頭 Amazon 亦透過 Amazon Pharmacy 大舉進軍醫療保健市場[7]。

科技交融：驅動成長與整合

如果說產業交融如同廣角鏡頭，得以協助我們從鄰近相關產業尋找洞察，那麼科技交融便提供了另一種視角，讓我們理解科技與創新如何相互結合，推動倍增式的成長。

科技本質上是用來解決特定問題的工具，但正如電鑽與普通鐵鎚，差別在於電鑽結合了鐵鎚、鑿子與動力來源，進而成為更高效的工具。因此，與其將科技視為獨立存在的個體，更關鍵的是思考如何將不同科技緊密整合，使其相互增強，並加速成長。

舉例來說，量子機器學習是將量子運算原理應用於機器學習程式之中，以大幅提升運算效率；而因網路科技技術如 5G 與邊緣運算（Edge Computing）的高度整合關係，使業界經常以「5G Edge」來合稱這兩項科技。此外，正如本報告在「硬體重新崛起」（Hardware is eating the world）章節所舉例，智慧工廠正在整合電腦視覺、感測器與數據，打造能夠自我學習與優化的機器，甚至可能有助於推動人形機器人的發展[8]。

那麼，至於當前最受矚目的 AI 呢？正如本報告前言提到，AI 終將成為無所不在的基礎科技，並將不斷與各種下游科技互相融合。

以 AI 與機器人技術的結合為例，雖然這兩項科技各自獨立，但真正的突破發生在「智慧」與「機械」結合的瞬間，進而創造更多可能性。AI 賦予機器人自主運作能力，使其能夠蒐集環境及動作數據，並回饋至 AI 演算法進行訓練，以此優化性能。當我們開始意識到科技本質上的互動特性時，便能察覺此飛輪效應（Flywheel Effect）如何推動成長與創新。

而這將為企業與科技領導者帶來何種影響？雖然將技術團隊劃分「彼此獨立」的單位可提升專業效率，但同時建立跨團隊的橋樑亦至關重要；換言之，若企業僅選擇稍作改良的「普通鐵鎚」而非採用更具突破性的「電鑽」，則終將落入「漸進式改良」的窠臼，錯失真正的創新機會。

重新定義文藝復興

在科學、藝術與商業快速變遷的時代，「通才」一詞象徵著一種理想，能夠跨足多個領域的專家，往往更具領導潛力。如今，隨著產業與科技的交融，更是證明了「廣度即深度」的觀點，企業對通才的需求比以往的任何時候都更為迫切。這些跨領域人才能夠以宏觀角度思考，能夠發掘產業、科技與概念間的關聯，打破看似無關的界線。隨著資訊量無限快速增長，社會對具備跨學科整合能力的「大局思考者」需求也持續攀升。

如前所述，若 AI 成為普及般的存在，其帶來的影響將極為深遠。電力的發明曾推動都市化、工業革命與無線電通訊等重大變革[9]。而 AI 也可能正處於引發類似變革的臨界點，徹底改變我們的工作、生活與溝通方式。

在這樣的時代之下，與其專注於既有方法，真正關鍵的應是具備遠見，能夠想像並實踐 AI 與宏觀科技趨勢的全新融合，例如 AI 在空間運算（Spatial Computing）與現代化核心系統（Core Modernization）等領域的應用。

對領導者而言，這意味著應重視非典型雙學位人才、跨部門合作，以及對關聯產業的關注。若企業能突破專業分工的藩籬，積極擁抱這類策略性交融，或許正站在重新定義文藝復興的關鍵門檻。

下一步，您的企業將探索何種融合機會呢？

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Acknowledgments

Special thanks

Ed Burns, Heidi Morrow, and **Abhijith Ravinutala** for being the creative engine powering Tech Trends. Ed and Abhi, your exceptional dedication, leadership, and editorial chops have truly elevated our work, not to mention your ability to deftly weave research and interviews into compelling narratives and your flexibility in managing feedback from multiple stakeholders. And Heidi, thank you for being a standard bearer for the principles of excellent design while enthusiastically embracing new ways of leading the design portion of Tech Trends. The beautiful report imagery, figures, videos, and other graphics are a testament to your leadership. We're lucky and thankful that the three of you are part of the team.

Sarah Mortier for diving headfirst into your new role of managing Tech Trends production and making it yours. It has been a thrill to watch your confidence grow as you identified challenges, proposed improvements, and ultimately kept us on track to deliver the editorial earlier than ever before. We appreciate you for being an eager and enthusiastic learner and we can't wait to see how you will "wow" us in year two.

Caroline Brown, for leading the Tech Trends editorial and design production team with good cheer, humor, and grace under pressure. Your leadership and strategic vision have been instrumental in taking Tech Trends to the next level, and we're incredibly grateful for you.

Imelda Mendoza and **Bella Stash** for the breath of fresh air you brought to the Tech Trends process by pitching in with research, data, and PMO support. We appreciate your enthusiastic and cheerful willingness to tackle whatever came your way.

MacKenzie Hackathorn, Haley Gove Lamb, Kiran Makhijani, and **Angel Lacambra,** for the work you'll do in bringing Tech Trends to life for our clients and account teams. Thank you for taking our work and making it real.

Stefanie Heng for your continued willingness to step in and help us figure out Tech Trends and the publication process. We appreciate your commitment to our team, even as you transition to a new role, and we look forward to seeing the heights you'll fly to next. We'll miss you more than you can ever know!

Deanna Gorecki, Ben Hebbe, Bri Henley, Tracey Parry, Abria Perry, Madelyn Scott, and **Mikaeli Robinson** for your unwavering dedication and innovative strategies in promoting Tech Trends. Your tireless efforts in marketing, communications, and PR significantly amplify our reach and impact year after year. Thank you for recognizing and believing in the value and impact of Tech Trends.

Taylor Brockman, Raquel Buscaino, Lucas Erb, Danny Greene, Mark Osis, and **Hillary Umphrey** for being our brain trust as we identified trends and for conducting initial research and showing us which way the compass is pointing in the long term. Thank you for generously sharing your knowledge with us and helping us hone our research craft.

Hannah Bachman, Aditi Rao, and the entire Deloitte Insights team for evolving our partnership and growing with us as we continue to look for ways to improve Tech Trends. We appreciate your continued support, flexibility, and grace as the needs of our team and our practice change.

Sylvia Chang, Manya Kuzemchenko, Melissa O'Brien, Molly Piersol, Natalie Pfaff, Harry Wedel, Jaime Austin, Govindh Raj, Megha Priya, Naveen Bhusare, and all the Marketing Excellence creative team members who helped develop report images and figures. Your creativity and dedication have resulted in a beautiful report and hub page that exceeds all expectations. We are grateful not only for your artistic vision and the captivating visuals that bring our work to life, but also for your commitment to collaboration and exploration.

Additional thanks

The authors would like to thank the Office of the CTO Market-Making team, without whom this report would not be possible: **Caroline Brown, Ed Burns, MacKenzie Hackathorn, Stefanie Heng, Bri Henley, Dana Kublin, Angel Lacambra, Haley Gove Lamb, Kiran Makhijani, Sangeet Mohanty, Heidi Morrow, Sarah Mortier, Abria Perry, Abhijith Ravinutala,** and **Bella Stash.**

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Designed by CoRe Creative Services. RITM2027492