



Directions 2012, San Jose, California
~ CONFERENCE AGENDA ~
[subject to change]

Directions 2012
Competing for 2020: Delivering on the Promise of the Connected World

7:30 am Registration and Breakfast

7:30 – 10:55 am Coffee Chats and Demos

Join analysts, product specialists, and peers to discuss business practices and experience demos that will help you realize future growth potential. These informal tables will be hosted throughout the morning for walk-up service.

BuyerPulse Deals Database: Worldwide Software — Analyze Customer Wins, *Melita Marks, Vice President, Global Software and Services Product Management*

The BuyerPulse Deals Database is a customer intelligence and planning-oriented research tool to support sales and marketing in uncovering recent shifts in software purchasing. With over 11,000 deals, it is the world's largest database of software customer wins and assists in tracking the software customers are purchasing in hot spending areas by market, industry, and country.

BuyerPulse Deals Database: Worldwide Services — Client Wins, Deal Renewals, Lead Generation, *Alexander Motsenigos, Program Vice President, BuyerPulse Services Research and Trackers*

With 40,000 contracts and coverage of 20,000 buyers located in 165 countries, the deals database is the world's largest database of IT and business services deals. With over \$2 trillion in Total Contract Value (TCV) captured, the database represents a powerful sales tool for services lead generation, account development and segmentation, contract benchmarking, services partner tracking, and competitor monitoring by industry, geography, and market.

Marketing Transformation — A Focus at the Intersection of Marketing and Sales, *Michael Gerard, Program Vice President, Sales Advisory Practice; Kathleen Schaub, Research Vice President, CMO Advisory Practice; and Joe Ferrantino, Research Manager, Executive Advisory Group*

A perfect storm has developed that requires sales and marketing to truly collaborate in an effort to optimize the customer creation process across their organization. No longer can each group optimize its processes and technologies independently. Best-in-class technology organizations have established specific initiatives to improve sales and marketing collaboration, focusing first on some of the more important areas of overlap (e.g., marketing operations and sales operations working on a more cohesive and better managed lead management pipeline and process, or sales operations taking a more strategic role in the areas of customer intelligence for sales and sales enablement and working with marketing to improve these areas for the benefit of sales reps). Join us for a discussion about some of the changes that best-in-class sales and marketing organizations have made to improve the productivity of their sales organization and the level of customer engagement. (Ask about our new joint marketing and sales benchmarks.)

Trackers: Getting It Right, *Hoang Nguyen, Program Vice President, Worldwide Trackers; Loren Loverde, Program Vice President, Worldwide Trackers, Consumer Devices; and Kathy Nagamine, Director, Worldwide Trackers*

At IDC, our tracker team believes that "Getting It Right" can only be done by knowing both the local and the global picture and having the right tools and processes in place to capture and present that knowledge to our clients on a timely basis. Stop by this demo to get a better understanding of how our tools, processes, and people are working to "get it right" with IDC's trackers and see some of the new enhancements we've added to our tracker portfolio.

8:00 – 8:45 am Breakfast Briefings

These early-bird breakouts are open to all. Attendees are welcome to pick up breakfast before proceeding to these sessions.

Application Development Trends: Developer Ecosystems in Flux, *Al Hilwa, Program Director, Applications Development Software*

Technical change is accelerating, and perhaps slowed down only by the pace at which developers can learn new skills. But software development techniques, languages, and tools are also advancing. Can they keep up? Where is application development going in the next few years? How will client-side and server-side application platforms evolve? This presentation will explore how we got to where we are today in light of what we know about developer ecosystems and how they transcend the consumer and enterprise domains of IT. The discussion will also address the changes we are about to face in application platforms and provide guidance to technology end-user organizations and vendors on how best to leverage developer ecosystems.

How CFO Priorities Are Shaping IT Funding Strategies and Consumption Models, *Joseph Pucciarelli, Program Director, Technology Financing and Executive Strategies*

As the economy recovers, the recession's lingering effects are still evident and shaping IT strategies: Corporate cash balances are at 50-year highs, expiring leased equipment is being purchased at record rates (rather than being replaced), and IT providers are being challenged to offer flexible new contract options. In this market trends overview, IDC reviews the latest IT funding, contracting, and consumption model trends and provides guidance for IT buyers seeking to secure the CFO's increasingly difficult sign-off on IT investment funding proposals.

Services in the IT Channel: New Opportunities and Challenges, *Chris Ilg, Program Director, Infrastructure Channels*

As IT consumption models evolve, the opportunity for IT services expands. In this presentation, IDC examines the evolution of the IT services market and the changing role of the IT channel in the sale and delivery of those services. The IDC Infrastructure Channels team will discuss ways that solution providers are changing to capture the growing opportunity for managed and cloud services and assess other new professional and consulting services opportunities. We will address the most in-demand services from the customer perspective and contrast them with services offered by the channel, while customer purchase criteria will be mapped to solution providers' value propositions. IDC will analyze which types of and how often IT services are delivered by vendors versus by channel partners and why customers opt to purchase services from one source over the other. Many dynamics are in play for organizations that are transitioning their indirect channel(s) from a primarily hardware and software resale-oriented model to one that is more services centric and better aligned with the needs of the customer. This presentation and subsequent discussion will provide valuable insights for customers, vendors, and solution providers.

9:00 – 10:25 am **General Sessions**

Welcome and Introduction, *Kirk Campbell, President and Chief Executive Officer*

Competing for 2020: Positioning to Win in 2012, *Frank Gens, Senior Vice President and Chief Analyst*

As we noted in last year's IDC Directions, the ICT industry is in the midst of a "once every 20–25 years" shift to a new technology platform for growth and innovation. We call it the 3rd Platform, built on mobile devices and apps, cloud services, mobile broadband networks, Big Data analytics, and social technologies. By 2020, when the ICT industry reaches \$5 trillion — \$1.7 trillion larger than it is today — at least 80% of the industry's growth will be driven by these 3rd Platform technologies. We'll see an explosion of new solutions built on the new platform, along with rapidly expanding consumption of all of the above in emerging markets. These dramatic market changes will force the industry's leaders to make bold investments and fateful decisions. And by the end of 2012, we'll have a very good idea of which vendors will — and won't — be among the industry's leaders in 2020.

In this opening session, IDC Chief Analyst Frank Gens will detail what the radically different ICT industry of 2020 will look like: what the offerings will be, who the customers will be, and where the money will be. And he will share the key steps players must take — right now, in 2012 — to position for leadership in this new ICT industry.

Hyper-Growth Chase for Emerging Markets: The Mobility Advantage, *Sandra Ng, Group Vice President, ICT Practice Group, IDC Asia/Pacific*

With the economic woes and uncertainty in the eurozone — and to a lesser extent in the United States — the focus on emerging markets has heightened among businesses across all vertical industries. Emerging markets are large and vast, demonstrating a diversity of opportunities and challenges and a widely varying degree of growth rates. Although CEMA and Latin America have demonstrated strong growth over the past year, the largest emerging market and one of the fastest growing regions is Asia/Pacific. Many global organizations see this region as the holy grail of potential business opportunities.

Among the four leading technology game changers — cloud, mobile, social, and analytics — mobility is where we see the greatest regional differences and opportunities based on the domestic nature of mobile services, applications, regulations, and players. Emerging markets have long been known for leapfrogging in the mobility space, completely eliminating the deployment of fixed/land lines in many cases. Leading mobility trends and innovations in emerging markets include, but are not limited to, the rise of smartphones (in some cases, smartphone shipments will exceed PC shipments in the next two years), the use of media tablets and accompanying WiFi access by Gen Y/Z consumers and businesses, and sub-US\$100 smartphone emergence in 2012 and the accompanying implications on data usage. In this session, Sandra Ng will bring to light the mobility advantage, challenges, and implications for vendors, service providers, and channels in emerging markets with hyper-growth chase as the leading driver.

10:25 – 10:55 am **Networking Break and Coffee Chats and Demos**

10:25 – 10:55 am **Analyst One-to-One Meetings**

Open to all attendees by appointment. Visit the Analyst Connection Kiosk to schedule your meetings. Visit www.idc.com/directions12 for a list of analysts available for one-to-one meetings.

10:55 am – 12:05 pm General Sessions

The Empowered IT User: How Individuals Are Using Technology and Redefining IT, *Danielle Levitas, Group Vice President, Consumer, Clients, Broadband and New Media*

We are all participants in the trend of consumerization of IT. Each employee is affecting what IT does and how it responds to our expectations and demands, with some of us pushing the boundaries faster and harder than others. With the enormous growth in smartphones and social media in recent years, individuals are demonstrating they will adopt new technologies for use in multiple aspects of their lives — and will do so increasingly out of their own pocket and on their own time. More recently we have started to see this trend carry over with tablets and emerging consumer cloud services.

The role of social technologies is at the heart of the evolution of business, as it impacts how we work together within and outside of our organizations. Companies need to rethink how they manage this increasingly complex world and support both the organization's and employees' needs while growing revenue, improving profitability, balancing costs, and rewriting corporate policies. In this session, Danielle Levitas will present research from across IDC that highlights pain points for organizations and demonstrates ways in which companies can be most effective in managing and empowering employees while capitalizing on these developments to drive business. She will also share a vision for how our multimodal needs will evolve and the new ways in which individuals — consumers — will continue to reshape technology and the rules for organizations over the next decade.

The Race to Value: Capitalizing on Big Data Hotspots, *Rick Villars, Vice President, Storage and IT Strategies*

Big Data is the IT industry's hottest topic. It is driving major acquisitions, spurring new buying preferences for IT hardware, and raising questions about the future of long-established software markets. Contrary to popular belief, the primary impact of Big Data won't be in how it affects the IT industry. Rather, it will be how exploitation of Big Data will reshape industries and overturn power relationships, creating new hotspots of conflict and innovation throughout the Intelligent Economy. Industries such as healthcare, media/entertainment, retail, telecommunications, and finance are especially prone to these trends. IDC believes organizations that are best able to make real-time business decisions using Big Data solutions will thrive, while those that are unable to embrace and make use of this new capability will increasingly find themselves at a competitive disadvantage in the market.

This presentation will describe how developments in Big Data will place stress on existing business practices, creating large-scale disruptions and opportunities alike. It will examine how the rapid evolution of Big Data is spurring information generators, owners, aggregators, and decision makers to make strategic and far reaching choices in 2012 and beyond. Rick Villars will also explore how IT organizations and their IT solution partners need to address the four V's (Volume, Velocity, Variety, and Value) as they design, deploy, and deliver enterprise-class Big Data solutions and services. The discussion will illustrate how leaders who actively participate in the creation of the IT-enabled, Big Data-driven Intelligent Economy can dramatically expand their organization's addressable market and position for accelerated growth in the coming decade.

12:05 – 1:30 pm Lunch and Lunch Sessions

Pick up a box lunch before your meeting or session.

12:05 – 12:35 pm Analyst One-to-One Meetings

Open to all attendees by appointment. Visit the Analyst Connection Kiosk to schedule your meetings. Visit www.idc.com/directions12 for a list of analysts available for one-to-one meetings.

12:05 – 1:20 pm Lunch Roundtables

Open to all attendees on a first-come, first-served basis. Note: Numbered roundtables that are not available in this location have been omitted.

Table 3: Beyond ROI — What Shapes IT Buying Decisions, *Randy Perry, Vice President, Business Value Strategy; and Joseph Pucciarelli, Program Director, Technology Financing and Executive Strategies*

In this discussion, our analysts will share the latest market findings from IDC's Business Value research practice, detailing how the economic outlook, new technologies, and shifting enterprise strategies are reshaping IT buying decisions. The discussion will include how these factors are complicating the buying dynamic and will identify best practices for vendors to map their marketing efforts to capitalize on this critical change in buying behavior.

Table 4: Big and Complex Data in HPC, *Earl Joseph, Program Vice President, High-Performance Computing; Steve Conway, Research Vice President, High-Performance Computing; and Chirag Dekate, Research Manager, High-Performance Computing and Workstations*

IDC's HPC team will discuss the growing use of large and complex data in the HPC technical marketing space. A number of actual end-user case examples will be discussed, as will a description of the underlying technology being used to address Big Data in HPC.

Table 6: Cloud Professional Services, *Gard Little, Research Director, IT Consulting and System Integration Research*

Organizations need professional services such as IT consulting and systems integration to build and implement cloud services. This roundtable will allow participants to hear about IDC research on how other organizations are using professional services in their migration to the cloud. Topics to be discussed will include: What is the business case for adopting cloud services? What workloads are being migrated to the cloud? Which vendors are providing related professional services?

Table 7: Cloud System Software: Evolving from Virtualization into Cloud, *Gary Chen, Research Manager, Cloud and Virtualization System Software; and Al Gillen, Program Vice President, System Software*

[Note: Al Gillen will spend time at both Table 7 and Table 13]

While server virtualization focused on abstracting the resources of a single machine and the consolidation of workloads, the emerging cloud system software market introduces an evolutionary new architecture that virtualizes groups of servers at scale. Cloud system software includes solutions from traditional platform providers, including VMware vCloud, Microsoft Windows Azure and Hyper-V Cloud, Citrix CloudStack, and Red Hat CloudForms. In addition, an increasingly competitive third-party market is emerging with solutions from community-driven initiatives such as OpenStack and Eucalyptus and start-ups such as Nimbula and Abiquo. This roundtable will discuss the impact of cloud system software for enterprises and service providers, the migration from existing virtualization deployments, and what it will take to win the battle for the datacenter platform of the future.

Table 9: Connected Health Strategies in a Post-Reform Environment, *Lynne Dunbrack, Program Director, Connected Health IT Strategies, IDC Health Insights*

New care delivery and reimbursement models that are evolving to meet the demands of health reform will provide new opportunities for improving financial and clinical performance. This roundtable will explore how forward-thinking healthcare organizations are using connected health technologies such as remote patient monitoring, consumer-facing mobile health applications, clinical mobility, sensors, and video conferencing to enhance patient engagement, improve care team collaboration, and provide quality care in the most cost-effective setting.

Table 10: Consumer Devices in the Workplace: Where Is the Opportunity for Services Firms? *Rebecca Segal, Vice President, Global Services Markets and Trends*

As businesses increasingly leverage consumer devices, software, and social media in the workplace, is there an opportunity for services providers? Does the opportunity center around enabling and securing the devices themselves, managing the valuable data on those devices, or helping organizations migrate key internal and external applications to the mobile platform? This roundtable will address these topics and explore how service firms are thinking about their role in helping businesses leverage the increasing number of consumer devices in the workplace.

Table 13: DaaS — Bringing Desktop Virtualization to the Masses or the Few? *Brett Waldman, Senior Research Analyst, Client and Server Virtualization Software; and Al Gillen, Program Vice President, System Software*

[Note: Al Gillen will spend time at both Table 7 and Table 13]

Desktop as a Service (DaaS) is the next great hope for desktop virtualization and the next desktop virtualization technology readying itself to cross the chasm. At this roundtable, we will discuss the pros and cons of DaaS, the software that makes DaaS possible, and adoption trends found in IDC's recent primary market research. Look for a discussion on whether DaaS will help bring desktop virtualization to the many in the enterprise, to SMB users, or to neither group.

Table 14: Driving Testing and Quality Services and Automation for Mobile and More — Leveraging IDC's ASQ and Testing Services MarketScapes, *Melinda Ballou, Program Director, Application Lifecycle Management and Executive Strategies*

Mobile branding and software deployments are exploding. We see a torrent of mobile applications and a practically insatiable appetite for adoption of the latest software. Yet the emergence of automated quality solutions for mobile lags customer requirements and the need for consistent, well-performing, stable software, even as business-critical applications and key corporate branding become available across mobile platforms. In addition, use of complex sourcing (e.g., service providers and open source) and deployment on additional environments creates additional quality challenges and market impact for decision makers. Join us and discuss results from 60+ user interviews and recently published IDC MarketScape research for ASQ and service providers.

Table 15: Enabling the Collaborative Enterprise — The Next Generation Enterprise Applications Platform, *Michael Fauscette, Group Vice President, Software Business Solutions*

The next generation of enterprise applications platform is already taking shape and combines some of the hottest trends in technology. This new platform is cloud based with embedded social and collaborative capabilities and contextual embedded business intelligence; supports work anywhere with any device; and supports ad hoc work, ad hoc work teams, ad hoc applications, and inter-enterprise collaboration. The platform is heavily influenced by consumer technology with a clean, simple UX, but has enterprise grade security, IP protection, and highly sophisticated filtering and information management.

Table 17: Hadoop/MapReduce Plans and Strategies, *Carl Olofson, Research Vice President, Database Management and Data Integration Software*

There has been a tremendous amount of interest, and quite a bit of project work, centered around MapReduce and its most popular implementation framework, the open source Apache Hadoop project. The feverish efforts of a number of vendors in the data integration field, as well as expert practitioners, promise a rich set of development and management tools as well as methodologies and services that support MapReduce (or Hadoop). In this roundtable, IDC will share intelligence regarding vendor activities, market size and growth, and expected usage paradigms. Attendees are invited to share their experiences, including use cases and best practices, in this important emerging area of Big Data.

Table 18: Hardware Recycling, Asset Management, and Disposal, *David Daoud, Research Director, Personal Computing and Green IT*

The recycling sector in the United States is a \$5 billion industry that relies on a steady stream of retired assets, mostly from a handful of vertical markets. With the ongoing refresh cycle, the need for a smarter industry, one that complies with data security, environment stewardship, and overall best practices, is necessary. This roundtable will discuss how corporations are designing their recycling strategies and how the supply side is responding.

Table 19: How Is IT Talent Changing for Financial Institutions, and What Skill Sets Will be Needed in the Future? *David Potterton, Vice President, Global Research, IDC Financial Insights*

Financial institutions are looking to support evolving technologies around mobile, social, and cloud services. At the same time, many institutions are tied to legacy infrastructures that carry their own risks for failure and support, as the IT resources who understand these systems are long past retirement age. This roundtable will discuss the current issues and concerns around the skill sets and alternatives IT professionals need to consider in financial services today and looking forward.

Table 20: How Shale Gas Is Driving IT Investments in the Oil and Gas Industry, *Rick Nicholson, Group Vice President, IDC Energy Insights*

Shale gas is a game-changer for the oil and gas industry, greatly adding to natural gas reserves in the United States and other parts of the world and "fueling" a new wave of innovation. Oil and gas companies operating in shale gas plays are taking a manufacturing approach to exploration and production, with a focus on increased efficiency and reduced costs. However, the process of hydraulic fracturing, or "fracking," has created environmental concerns. All of this is driving increased IT investments in capital planning, rig scheduling, supply chain management, EAM, EH&S, collaboration, and business analytics.

Table 21: Implementing a Value-Based Pricing Strategy, *Brian Clarke, Vice President, Pricing Evaluation Services; and Bill Roch, Program Director, Product Evaluation Services*

Value-based pricing involves quantifying what truly differentiates you from your competition. Having a successful value-based pricing strategy will lead to higher margins. Implementation requires a high degree of awareness of not only your value drivers as they relate to your price but also the value drivers and pricing of your competition. This roundtable will discuss the methods available to identify, quantify, and sell value.

Table 23: Key Trends and Challenges in M2M, *John Byrne, Research Director, Wireless Infrastructure; and Carrie MacGillivray, Program Director, Mobile Services and Infrastructure*

This roundtable will discuss the current state of M2M deployments and the challenges that must be addressed by operators and vendors to bring M2M to its full potential. For example, operators must be able to provide high reliability and redundancy, and the ability to efficiently process reams of data transactions simultaneously. From a business perspective, operators must be able to provide robust tracking and billing support as well as expertise in targeted verticals such as utilities and healthcare, where M2M applications are poised to take off. This discussion will provide an overview of the M2M challenges and how vendors are working with their operator customers to address them.

Table 24: Looking at Social Business Implications from the Inside Out and the Outside In, *Mary Wardley, Program Vice President, CRM and Enterprise Applications*

With the large amount of attention that social networking has garnered from a consumer perspective, it is no wonder that businesses have also begun to make the shift to incorporate social networking tools into their organizational strategies. However, employing a social business strategy is not a one-way street to only push marketing messages or monitor customer behavior. Instead, it focuses on building a knowledge-sharing culture through communication, content, and collaboration, which impacts many organizational activities that are internal, employee focused and/or external, customer focused. This roundtable will discuss the factors driving the adoption of social business in the organization and how companies can utilize a social business approach to become a better employer, supplier, and partner to internal and external stakeholders.

Table 25: Mission-Critical Workloads Move into the Era of the Cloud, *Jean Bozman, Research Vice President, Enterprise Servers; and Lloyd Cohen, Director, Worldwide Market Analysis, Global Enterprise Server Solutions*

As workloads are transformed — and moved around the datacenter — high availability of applications and data remain top-of-mind considerations for IT managers. This is true even as workloads move into a virtualized computing environment — and onto the cloud. This roundtable will focus on approaches to keep those applications up-and-running alongside the production data they're accessing.

Table 27: Mobility, Cloud and Video: Driving Network Intelligence, *Lucinda (Cindy) Borovick, Program Vice President, Enterprise Communications and Datacenter Networks*

At a time where the drive toward mobile, virtual and cloud computing is all but certain, the enterprise network is evolving to ensure it meets IT and business needs. The converged enterprise is transitioning to a newer, efficient and intelligent network. Further, as the use of business video increases in the enterprise and BYOD gets to be the buzzword that attracts IT's attention, enterprise networks need to evolve and stay on top of the onslaught of content, files and analytics transforming the network. IDC believes that intelligent networks will offer the reliability, security and quality of service necessary to handle the most demanding next generation network requirements. This roundtable will discuss the intelligent economy and how it is impacting enterprise networks — from the edge and campus to the datacenter.

Table 28: New Media Trends, New Media Monetization — You Ask, We Answer, Karsten Weide, Program Vice President Media and Entertainment

The online world is churning with innovation and change, revolutionizing the way we do business and go about our daily lives. The mobile Internet, media tablets, social media, the cloud, and Big Data all create business opportunities and challenges. In what is now called "The Great Tech War of 2012," players like Amazon, Apple, Google, and Facebook are jockeying for the best spots to capitalize on those trends. Come and join IDC's Program Vice President of Media and Entertainment and head of IDC's consumer research, Karsten Weide, for a free-wheeling talk in which you bring the questions, and he brings the answers.

Table 30: Opportunities in Business Analytics — Decision Management, Unified Access, and Big Data, Dan Vesset, Vice President, Business Analytics Solutions

This roundtable will focus on identifying opportunities for business analytics vendors to capitalize on demand for decision management, unified information access, and Big Data solutions.

Table 31: Opportunities to Bridge the Skills Gap in Analytics, Henry Morris, Senior Vice President, Worldwide Software and Services Research; and Cushing Anderson, Program Vice President, Project-Based Services

Analytics is booming as companies seek to gain competitive advantage in the intelligent economy, but the skills to apply analytics are in short supply. Hence, talent is shaping up to be the biggest constraint on the penetration of analytics to more organizations and within organizations. This constraint represents opportunity. Skills are needed not just for the analytical modeling but also for the up-front data work and the transformation work in the enterprise to encourage the use of analytics for fact-based decisions. We'll discuss the professional services opportunities to bridge the gap and the state of analytics training today from vendors, universities, and training companies.

Table 32: Platform as a Service, Stephen Hendrick, Group Vice President, Application Development and Deployment Research; and Al Hilwa, Program Director, Applications Development Software

Platform as a Service (PaaS) is emerging as the key battleground now, not just for custom application development but for cloud-specific capabilities that will define how secure and how economical the cloud will be. This lunch roundtable will bring to the surface key issues driving PaaS and enable participants to enter into a dialog with IDC analysts to help better understand the implications of capabilities such as provisioning, dynamic scalability, and multitenancy.

Table 33: Risk Technology — Spending and Financial Industry Trends, Michael Versace, Research Director, Global Risk, IDC Financial Insights

IDC Financial Insights released this summer and fall a series of reports that forecast Risk Technology spending across the banking, capital markets, and insurance sectors. A summary of this uniquely comprehensive, fact-based view of the risk spending market will be discussed at this roundtable session. Participants will engage in give and take on risk trends and spending submarket topics such as enterprise risk management and infrastructure, financial crimes management, information security, liquidity and asset liability management, market risk and trading, and others.

Table 34: Semiconductor Trends in Telecommunications Infrastructure and Enterprise Networks, Abhi Dugar, Research Manager, Wired Communications Semiconductors

This roundtable will discuss trends in the Telecommunications Infrastructure and Enterprise Networks semiconductor market. Topics for discussion will include semiconductor suppliers, technologies, CPU architectures, and applications. Discussion will include x86 processors and System on Chip devices based on Power Architecture, MIPS, and ARM CPU architectures; multicore processing; semiconductor trends in enterprise and datacenter switching and routing; and wireless infrastructure migration from 2G/3G to 4G LTE/WiMAX.

Table 35: Semiconductors — Emerging Technologies, Companies, and Forecasts, Mali Venkatesan, Research Manager, Semiconductors, Emerging Technologies, and Markets

Semiconductors are becoming more and more pervasive in our day-to-day lives. As the Internet of Things, Smart Technologies, and Intelligent Systems emerge, so do new semi-technologies, new companies, new ecosystems, and new opportunities. This roundtable will use IDC's Semiconductor Application Forecaster (SAF), which provides forecasts by over 100 end-device applications, as a basis, and participants will discuss how new semiconductor process and design technologies, hardware/software/support ecosystems, and customer requirements are shaping these markets.

Table 36: Smart Government and Smart Cities — The Collaborative Enterprise, Thom Rubel, Vice President, IDC Government Insights

Smart Government and Smart Cities are evolving as governments improve information management, analytics, and sharing. This discussion will focus on business and IT investment strategies that governments are pursuing to connect agencies, programs, and services and increase information value to improve operational efficiency and government services delivery. We'll also discuss the opportunities in Smart Cities around intelligent public safety and intelligent transportation and the attitudes of cities in the United States and other regions toward intelligent solutions, the challenges for implementation, and how to assess for Smart City readiness.

Table 38: Technologies Driving Mobile Consumer Products — Tablets and eReaders, Michael Palma, Research Manager, Consumer Semiconductors

This discussion focuses on the technologies and platforms driving the best-selling consumer electronics devices on the market, Media Tablets and eReaders. We will focus on the technologies that differentiate application processors and other semiconductors that enable tablets to deliver compelling solutions to consumers. From gesture and voice recognition to augmented reality, NFC and commerce, and DRM, we will discuss how different suppliers are investing in these and other technologies to drive new use scenarios. We will also discuss the value chain for these products and see how choices made at this level impact final products.

Table 40: Telco Transformation — Maintaining Influence, Relevance, Value, and Control in the Cloud, Melanie Posey, Research Vice President, Hosting and Managed Network Services

In this lunch roundtable discussion, participants will discuss the challenges facing telecom service providers in the increasingly converged information, communications, and technology (ICT) space. Previously, telcos' biggest competitors were other telcos. In today's cloud/converged competitive environments, everyone is jockeying for position. We will discuss: What are telcos' opportunities in the emerging mash-up world of cloud, mobility, content, applications, IT infrastructure, and user-centric service delivery models?

Table 41: The CIO Agenda, David McNally, IT Executive Advisor

The four forces of industry transformation (cloud computing, mobile, social media, and Big Data/analytics) continue to drive the CIO agenda. Mobile devices and applications are proliferating at a rapid pace. Cloud solutions are maturing, though security remains a top-of-mind concern among CIOs. With cost pressures on IT expected to continue into 2012, our roundtable discussion will focus on where CIOs are able to make investments for innovation.

Table 42: The Future of BPO, Mukesh Dialani, Research Manager, Worldwide BPO and Engineering Services; and David Tapper, Vice President, Outsourcing and Offshore Services Market Research

This roundtable will discuss IDC's views on how BPO providers need to transform from a more labor-oriented model of delivery to one involving greater automation, what BPO providers may look like from a business model perspective (e.g., from vertically integrated to specialized), and how their ecosystem and partners and suppliers will need to evolve. Additionally, this discussion will focus on key issues such as: What is the value that customers will expect from their providers, and with which constituencies in the enterprise will providers have to build relationships (e.g., C-suite) to win business?

Table 44: The Role of Distribution in the Era of the Cloud, Chris Ilg, Program Director, Infrastructure Channels

As IT consumption models continue to evolve and transition to on-demand, self-service models, the IT channel ecosystem must adapt to accommodate these new models. Solution providers are changing their business models and sales orientation and are developing new cloud-based service offerings to address this new opportunity. At the same time, the distribution tier is adapting to provide the necessary support and enablement to its partners and maintain relevance in the era of the cloud. This roundtable will focus on what distributors are doing and what VARs, MSPs, and other solution providers can expect in terms of cloud support from their distribution partners.

Table 46: What Facebook, Google, Amazon, and eBay Mean to Retail, *Greg Girard, Program Director, Merchandising Strategies, IDC Retail Insights*

With their presence in retail already felt, Facebook, Google, Amazon, and eBay have designs to do more as providers of technology platforms, customer analytics, channels, and localization and personalization services and as aggregators of broad and deep merchandise assortments. They can change industry structure and the basis of competition — changes which may make some information technologies obsolete and create markets for new technologies and services. This roundtable will focus a discussion around these issues.

Table 47: What's Next in Smartphones? *Will Stofega, Program Director, Mobile Device Technology and Trends*
Smartphones play a key role in delivering the promise of the connected world. What other device is with you everywhere you go? And what gets replaced and upgraded most often? Still, as popular as these devices are, IDC believes that the best years of the smartphone are yet to come. This lunch roundtable focuses on what lies ahead in the worldwide smartphone market, including vendors, carriers, and platforms, as well as IDC's essential guidance for the next era of smartphones.

Table 48: Will Big Data Eat My Lunch? *Benjamin Woo, Program Vice President, Storage Systems and Big Data*
Big Data is changing how information affects all aspects of enterprises today. Join us for a discussion that includes: How will Big Data change the way technology departments are organized? How will Big Data affect the way technology departments will interact with business units? How will Big Data change the view of business leaders on technology?

12:40 – 1:20 pm Lunch Special-Interest Sessions

Pick up a box lunch before your session.

Cloud Delivery for the Mobile Enterprise — The Increasing Relevance of Intelligent Network Infrastructures, *Rohit Mehra, Director, Enterprise Communications Infrastructure*

With smart mobile devices proliferating and BYOD increasingly getting the nod from IT departments, the enterprise is well on its way toward mobilizing its business-critical and collaborative applications. In parallel, as IT turns on an increasing number of cloud-based applications, it needs to provide an optimized framework for application access and delivery across the network for any device and access modality, irrespective of the cloud topology being deployed. In this scenario, the role of the underlying network infrastructure to deliver a best-in-class user experience cannot be overemphasized. This presentation will outline how network managers can leverage current and emerging network intelligence options to build a better, intelligent enterprise.

Mobility and the Cloud: Embracing the Next Wave of Innovation, *Courtney Munroe, Group Vice President, Worldwide Telecommunications, Mobility and Network Infrastructure*

The proliferation of mobile devices within the enterprise will enable a new paradigm for accessing corporate applications and content, while facilitating new modes of enterprisewide collaboration. While cloud-based applications will offer tremendous benefits to enterprises, such as increased flexibility and productivity, they will also present significant challenges, including policy and device management as well as other network infrastructure implications for service providers and IT managers. Such deployments will also have an impact across a diverse segment of equipment and software vendors as well as service providers. This session will explore some of the key enablers and discuss the ecosystem stakeholders in mobile cloud.

SMBs in 2020 — Positioning Now for the Reinvention, Opportunity, and Challenges of Tomorrow, *Ray Boggs, Vice President SMB Research*

The shift to new platforms and new thinking about IT is especially dramatic among SMBs as they emerge from the Great Recession. Business and IT priorities have been recast along with a new focus on social, mobile, and virtual capabilities. The interaction of all three is helping to change how leading SMB 2.0 firms think about their operations. Even more important though is how those new attitudes will be embraced by small and midsize businesses in the United States and worldwide. Join us for a review of the latest IDC SMB forecasts and segmentation, which will set the stage for the new opportunities — and challenges — facing those looking to help SMBs succeed into the next decade.

12:45 – 1:15 pm Analyst One-to-One Meetings

Open to all attendees by appointment. Visit the Analyst Connection Kiosk to schedule your meetings. Visit www.idc.com/directions12 for a list of analysts available for one-to-one meetings.

1:30 – 2:10 pm Track Sessions

Track 1: Embrace the Changes! New Techniques for Tech Marketing and Sales Enablement, *Rich Vancil, Vice President, Executive Advisory Group*

The marketing transformation continues to sweep through the IT vendor community. Budgets and priorities are shifting faster now than at any time in the past several years. Marketers are just at the beginning of their capability to embrace the new social and digital media that gives buyers more power in the purchase decision. What is your marketing organization doing to harness these changes? In this session, IDC's lead CMO Advisory analyst Rich Vancil will offer new research on "How Buyers Buy" and the marketing techniques to which they respond best. He will share a timeline on how to create a customer and arm your sales reps with the right assets, including how to apply new social and digital media tools to your marketing mix. He will examine the overall outlook on marketing budgets and trends in 2012.

Track 2: Leveraging Open Source Big Data for Fun and Profit: What Can Linux Teach Us? *Dan Vesset, Vice President, Business Analytics; and Al Gillen, Vice President, System Software*

Hadoop and other open source technologies for managing ever increasing volumes of data provide developers with tools to address previously unfulfilled business user requirements. But this key technology of the Big Data market challenges IT providers to derive profit from a free solution. This session will provide established vendors and start-ups competing in the Big Data information management and analysis market with lessons from the evolution of the Linux ecosystem that can guide them on the path to profitable growth.

Track 3: Public, Private, and Hybrid Cloud Adoption — New Rules for IT, *Robert Mahowald, Research Vice President, SaaS and Cloud Services*

Business buyers are changing how they elect to source technology, how they think about challenges like economics and IT complexity, and how to best deploy their resources. Today there are more good choices for buying IT capability in the cloud than ever, but it's clear that hybrid deployments will become the new standard IT topology, and many of the problems of today's enterprise datacenters will be replaced by a new complexity, with mixed location, costs, datacenters, and a new class of external service providers to manage. In this session we will use survey data, forecasting, and innovative modeling to show how the cloud adoption profiles are shaping up in 2012, and what the future holds for public, private, and hybrid cloud adoption.

Track 4: From Sensors to Super Computers: What Will It Take to Build the 3rd Platform? *Vernon Turner, Senior Vice President, Enterprise Infrastructure, Consumer, Network, Telecom and Sustainability Research*

IDC's 3rd Platform is the environment where IT industry growth is emerging, and it will drive the bulk of IT industry growth from now to beyond 2025. This session takes a hard look at the underlying technology changes that will occur to enable this 3rd Platform. Sensors, machine to machine, mobile platforms, standards, and disruptive innovation have the ability to make the IT landscape predictably unrecognizable. Giving infrastructure its intelligence will create the intelligent economy, and this session will give you examples of what impact the intelligent economy will have on you.

Track 5: The Collaborative Enterprise: The Next-Generation Social Business, *Mike Fauscette, Group Vice President, Software Business Solutions*

Social business technology adoption is accelerating as more businesses embrace new approaches for collaboration and new methods to engage the social customer. The technology itself is maturing, and the "second wave" of solutions is hitting the market as both start-up and major vendors innovate and consolidate to offer broader and deeper social feature sets. The new connected enterprise is moving to a new networked business model that spans customers, employees, and partners. This session offers a snapshot of current social business concepts as well as the future of the business model and the emerging platform to support it.

Track 6: Mobile Devices: The Truth about Tablets, Touch, Platforms, PCs, and Phones, *Bob O'Donnell, Program Vice President, Clients and Displays*

The key ingredient to make the mobile revolution a reality is the devices themselves: smartphones, tablets, ultrabooks, and many more. Not only do we expect to see continued evolution in the physical form factors of the devices, we're also seeing an evolution in the platforms upon which these devices run. The end result is a staggering array of devices that are giving consumers and business users an incredible range of choice; frankly, more choices than the market will bear. In this session, IDC will predict the winners and the losers in this impending device war and lay out a vision for where the world of mobile devices is headed.

Track 7: The Smart IT Ecosystem: Foundation for Economic Competitiveness, *Thom Rubel, Vice President, IDC Government Insights*

The enterprise and resources are increasingly linked to external resources and partners that are key to success in the global economy. Smart IT ecosystems that include energy, transportation, and governments are evolving that facilitate the competent delivery of services and infrastructure to provide for successful local, regional, and international commerce. In this session, IDC analyst Thom Rubel will present trends and drivers that are accelerating the deployment of smart technologies and solutions critical to economically sustainable cities and regions and discuss the importance of foundational government information and services that support them.

Track 8: To Capture China's Hyper Growth: A Winning Strategy Checklist, *Kitty Fok, Vice President, Greater China Research, IDC Asia/Pacific*

In a single month today, China ships as many PCs as Australia ships in a year, and it is likely by 2015, there will be a similar dynamic with regard to Japan. By 2015, total IT spending in Beijing will be the same as that in Switzerland, which is the 17th largest IT market in the world. Understanding the technology adoption, local favors, government agenda, city-level dynamics, role of state-owned enterprises, industries, and partnership is essential to capturing a slice of this hypermarket. In this session, Kitty Fok will share key insights to form your winning strategy checklist, including major projects related to the government's 12th five-year plan, city-level development, and partnership strategy.

2:20 – 3:00 pm Track Sessions

Track 1: Lead Management: Getting Tactical at the Intersection of Marketing and Sales, *Kathleen Schaub, Research Vice President, CMO Advisory Practice*

Most B2B companies will readily admit that the Internet has irrevocably changed marketing. However, fewer companies can assert that they've adapted their lead funnel to digital reality. IDC's research on buyer behavior, funnel conversion rates, and sales and marketing practices demonstrates how today's empowered buyer is subverting the traditional lead funnel, leaving sales productivity in the dust. Kathleen Schaub will share IDC's Customer Creation Framework and provide practical guidance on how B2B companies can transform their lead management to the reality of how customers actually buy. Attend this session to learn how rewriting lead management rules can align sales and marketing and open the door to measuring true marketing ROI.

Track 2: The Transformation of the Services Industry: How Cloud Services Are Disrupting Old Models and Driving the Need for a Road Map to the Future, *David Tapper, Vice President, Outsourcing and Offshore Services; and Gard Little, Research Director, IT Consulting and System Integration Research*

History is replete with disruptive technology changes. The same can be said of the emergence of cloud services as a major disruptive force versus the traditional, more labor-centric model of service delivery. This session will take a look at the resulting transformation of the services industry across the life cycle of services, from professional services (e.g., technology consulting, systems integration, custom application development, testing) to outsourced/managed services. We will highlight how the mix of services will evolve, define the alignment between these two service delivery models, and identify key similarities and differences. Vendors will need to consider factors such as the evolution of the provider community, a changing ecosystem structure, the need for a "supply chain" of service delivery, and the impact of internal enterprise transformation in adopting cloud-based services.

Track 3: Not All Datacenters Are Equal: How Infrastructure Divides the Cloud Provider Landscape, Michelle Bailey, Research Vice President, Enterprise Platforms and Datacenter Trends

As we enter the next business cycle of IT, the potential for disruption in the enterprise market becomes an ever present discussion. As the new IT market evolves, service providers are the center of attention, with the expectation that they will be the conduit of change for the future enterprise datacenter built on new architectures, platforms, and cloud-based business models that will redefine the economics of IT delivery. But just how different are the service providers from the classic enterprise datacenter? What are the myths versus the realities of their changing infrastructure? How will the established players compete against the new entrants? Does the one-size-fits-all promise of cloud infrastructure actually meet the unique needs of the enterprise application portfolio? In this session, Michelle Bailey will present the results of recent in-depth research with leading service providers and their customers that captures the infrastructure that is being built to support future off-premises computing, representing both an opportunity and a threat to suppliers and IT buyers.

Track 4: Securing the 3rd Platform: Cloud, Mobile, Social, and Big Data, Christian Christiansen, Program Vice President, Security Products and Services

As Victor Hugo wrote in *Histoire d'un crime*, "An invasion of armies can be resisted, but not an idea whose time has come." Security is an idea whose time has come. As threats have become miserably omnipresent, security must move beyond hunches and guesses toward a predictable science. To ensure a robust 3rd Platform, security must be baked into the four pillars rather than being smeared on. Moreover, senior management, employees, business unit leaders, partners, resellers, and customers must share a common view of security and expectation of risk. In his presentation, Christian Christiansen will discuss risks, expectations, and solutions whose times have come.

Track 5: Best Practices for the Social Business, Mary Wardley, Vice President, Enterprise Applications and CRM Software; and Lisa Rowan, Program Director, HR and Talent Management Services

Companies' adoption and use of social technologies to both solve internal collaboration issues and increase customer engagement are gaining momentum. In this panel session, IDC analysts will discuss the best practices that are emerging across a wide range of business functions and industries. Join the discussion of how companies are evaluating and implementing new ways of collaborating to get work done with internal and external stakeholders. Learn how companies are leveraging social tools to change the way they engage and manage talent, and how companies are dealing effectively with the "social customer."

Track 6: Mobile Apps: Development Strategies, Distribution Evolution, and the Next Set of Opportunities, Scott Ellison, Vice President, Mobile and Consumer Connected Platforms

Mobile apps continue to be among the fastest evolving spaces in all of IT. New trends can emerge and become reality in just a matter of months (e.g., education apps on iPads in schools). Enterprises embracing employee-provided smartphones and tablets are creating new dynamics for app management and distribution (e.g., enterprise app stores). And the emergence of HTML5 might upend mobile all over again. This session will discuss these trends and the new set of mobile app opportunities, including augmented reality, contextual inference engines, and how social remains among the most under-leveraged capabilities in the mobile apps space.

Track 7: Commerce in the Intelligent Economy — Focusing on Customer Experience, Greg Girard, Program Director, IDC Retail Insights; and Scott Guinn, Research Director, Enterprise Applications

Customers in the intelligent economy are instrumented, informed, and interconnected. They expect thoroughgoing engagement with the retailers, trading partners, manufacturers, and intermediaries whom they trust with their privacy, time, and money. Brand engagement, the new coin of the realm of commerce, spans discrete sequential commerce experiences and weaves them into lifetime relationships. Successful engagement depends on excellence in trading partner, enterprise, consumer, mobile, and social information technologies.

Track 8: CEE and MEA Regions: Understanding the Impact of Technology Transition on Growth Opportunities in Emerging Markets, Steven Frantzen, Senior Vice President, Research, IDC EMEA, and Managing Director, IDC CEMA

While the regions of Central and Eastern Europe and Middle East and Africa represent a significant source of ICT market demand, economic developments, political uncertainty, and technology transition continue to shape growth dynamics and opportunities. This session will take a broader look at some of the key developments and ICT market trends within the CEE and MEA regions, while examining the impact of technology change on IT proliferation and usage, the transformation of business models, and innovation in very different and diverse economic environments.

Track 1: Voice of the Sales Rep — Panel, *Moderator: Michael Gerard, Program Vice President, Sales Advisory Practice*

Technology marketing organizations have made significant investments across the buying process, from awareness building through demand generation; however, have sales teams and channels been able to leverage and capitalize upon this investment for improved sales productivity and effectiveness? As marketers, how effective have we been at "delivering the right information to the right person at the right time in the right format and in the right place to assist in moving specific sales opportunities forward" (i.e., IDC's definition of Sales Enablement)? IDC research indicates that the average technology organization can improve its revenue by 10% by optimizing this sales enablement process. Michael Gerard will lead a panel of sales managers and sales representatives in an interactive discussion about what is most effective for their sales teams' success. This is IDC's first ever panel of the frontline sellers at Directions and will give executives perspective and feedback on how marketing can best impact sales' productivity and effectiveness.

Track 2: Business Analytics as a Key Practice Area for Services — Panel, *Moderator: Henry Morris, Senior Vice President, Worldwide Software and Services Research; and Panelists: Mukesh Dialani, Research Manager, Worldwide BPO Services; Brian McDonough, Research Manager, Analytics and Data Warehousing Software; and Ali Zaidi, Senior Research Analyst, IT Consulting and Systems Integration Services*

As enterprises invest to mine corporate and customer data to refine their business operations, they have increasingly reached out to third-party business analytics services providers to assist them in these efforts. Consulting, systems integration, and IT services companies such as Deloitte, PwC, IBM, Accenture, Infosys, and Genpact, etc., have built significant business analytics practices and have achieved this scale by integrating their own business process and industry expertise and insight as well as leveraging partnerships with other business analytics ecosystem entities such as BI tool and analytic application vendors and technology platform providers. This is a clear shift from the traditional do-it-yourself method of implementing a business intelligence tool within the enterprise.

Track 3: Cloud Proofing the Next-Generation Enterprise Infrastructure: Understanding General Purpose and Special Purpose Converged Systems Needs, *Matt Eastwood, Group Vice President and General Manager, Enterprise Platforms*

Enterprise IT organizations are facing more pressure than ever to transform how they deliver IT services to the business. Business leaders are pressuring IT to deliver new IT services quicker, more reliably, and at lower costs than ever before. IT leaders are struggling to rationalize the full range of on-premise and off-premise options available to them. Evolutionary and revolutionary tactics are being considered for private and hybrid cloud delivery that increasingly leverage converged systems. In this session, Matt Eastwood will look at changing workload deployment patterns, the advent of new service deliver platforms, and the impact enterprise datacenter economics will have on the shape of the IT infrastructure landscape.

Track 4: NextGen Mobile Architectures: Solving the Congestion Dilemma, *John Byrne, Director, Wireless and Mobile Infrastructure*

The emergence of higher-speed networks and rapid uptake of smartphones, tablets, and USB dongles has forced operators to focus on a new approach to network deployment to keep pace with exploding demand for mobile broadband. For starters, operators will need to deploy more macro base stations and evolve gradually to more efficient LTE and LTE Advanced technologies. More fundamentally, however, in addition to simply providing more cell sites, operators will need to implement a host of micro-based solutions in order to provide capacity in the most densely populated areas where mobile data usage is greatest. Operators will need to deploy "heterogeneous" network solutions that leverage a variety of cell sizes, in as many spectrum bands as possible, as well as aggressive WiFi offload capabilities, in order to keep pace with demand. This presentation explores emerging "HetNet" solutions and provides insights on how quickly the market for HetNet solutions will evolve.

Track 5: Cloud Platform Wars — A Lasting Conflict or Capitulation and Consolidation? *Stephen Hendrick, Group Vice President, Application Development and Deployment Research*

Application platforms are fast becoming the foundation for all application development and deployment. Cloud application platforms introduce added layers of sophistication and complexity in their quest to provide a more democratized environment. The result is a rapidly expanding market with widely differentiated products from both new and established vendors and an all-out war by vendors to establish beachheads, create alliances, and wage war, all in the name of the customer. This session will examine the ways in which vendors are engineering differentiation into their cloud platforms and will discuss the impact that comes from functional or architectural issues such as platform architecture, APIs, dynamic scalability, multitenancy, development styles, frameworks, orchestration, process compositions, open source, and application marketplaces. This rich diversity of platform dimensionality will be rationalized from the standpoint of the end user, which will provide insight into what really matters and what will drive success in the cloud application platform market.

Track 6: Connecting Phones, Tablets, Things: Mobile Services in 2012 and Beyond, *Carrie MacGillivray, Program Director, Mobility and Telecom*

In order to create a seamless mobile experience to consumers' many devices, the mobile operator plays a crucial role. However, the role of the operator is challenged by other channels to market (e.g., retailers) looking to provide a connected consumer experience. In 2012 and beyond, operators will have to adjust to a new reality for offering both traditional and value-add mobile services to their customers across their networks. IDC will discuss the landscape today, how carriers will evolve to compete more effectively in this changing mobile ecosystem, and how the migration to LTE will pave the way for this new reality.

Track 7: Smarter Healthcare Is Connected Healthcare, *Lynne Dunbrack, Director, Connected Health, IDC Health Insights*

New care delivery and reimbursement models are evolving to meet the demands of health reform and will provide new opportunities for improving financial and clinical performance. The perfect alignment of drivers — health reform, cost, access, increased focus on managing chronic conditions, and an aging population — will help healthcare organizations justify investment in connected health IT strategies over the next five years to provide smarter healthcare. Connected health IT strategies include consumer-facing mobile health applications, clinical mobility, remote patient monitoring, sensors, and video conferencing. This presentation will discuss the key trends driving connected health and the impact of legislation, including the American Recovery and Reinvestment Act (ARRA) and health reform, on the outlook for connected health. It will present an overview of the smarter, connected health market, examine the role of mobility for improving clinical performance and patient engagement, and explore how proliferating self-service technology will create Big Data. Examples of notable connected health projects will be provided.

Track 8: Emerging Markets and the 3rd Platform: Latin America, *Anderson Figueiredo, Brazil Domain Manager, Enterprise, IDC Latin America*

This presentation will begin with a brief introduction on Brazil, emphasizing economic and social indicators of the city of São Paulo and the great events planned for the country (World Cup Soccer in 2014) and, in particular, for the city of Rio de Janeiro (Olympics in 2016). It will also include an overview of the current macroeconomic scenario of Brazil and Latin America, highlighting the momentum of the region compared with other geographies. Finally, we will highlight the IT market (hardware, software, and services) in Brazil and Latin America, with qualitative aspects of these markets, as well as future trends and the growth expected in the coming years.

4:00 – 5:15 pm

Closing Session: Professor Paul Romer



The Critical Role of Startups in Changing the Rules and Driving Future Growth, *Professor Paul Romer, Senior Fellow, Stanford Institute for Economic Policy Research, and Henry Kaufman Visiting Professor, NYU Stern School of Business*

Communities are shaped by technologies, to be sure, but also by rules. The rules for mainframes were strong and broad. The Wintel rules were strong but narrow. For a time, a narrow focus left room for rapid innovation, but the lead is now shifting. The weak and narrow rules of the Internet leave room for innovative new communities governed by new players such as Google, Salesforce.com, Amazon, and Facebook, but weak and narrow rules can also impose costs. The lessons from technical communities apply equally well to nations and cities: (1) Good governance typically requires rules that are narrow but strong. (2) The big leaps forward come when a startup community competes by proposing a new set of rules. (3) Ironically the weak and narrow rules of both the global financial system and the European Monetary Union expose us to far more risk than the weak and narrow rules of the Internet.

5:15 – 5:30 pm

IDC Closing Remarks

Crawford Del Prete, Executive Vice President, Worldwide Products, and Chief Research Officer