

March 4, 2009
San Jose, CA

March 17, 2009
Boston, MA

Directions09

IDC
Analyze the Future

~ CONFERENCE AGENDA ~

Directions 2009 ~ ICT at a Watershed: New Risks, Rules and Opportunities

Note: Some sessions and speakers are exclusive to one location. If no city is designated, that session or speaker will be available in both San Jose and Boston.

7:30 am Registration and Breakfast

7:30 – 10:55 am Coffee Chats & Demos

Join analysts, senior staff and peers to discuss business practices and see demos that will help you manage today's challenging economy. These informal tables will be hosted all morning for walk-up service.

Trackers: The Golden Compass, *Hoang Nguyen, Program Vice President, Worldwide Tracker Program, and (Boston only) Loren Loverde, Director, Worldwide PC Tracker, and (San Jose only) Kathy Nagamine, Director, Worldwide Trackers*

A compass always points north; while our Tracker tools guide clients towards the right business opportunities by providing "detailed, timely, and accurate quantitative information on the rapidly changing global IT market."

Target Marketing for a Competitive Edge: IDC Market Models – Custom Market Forecasting and Segmentation, *Meg Dings, Vice President, Services Consulting, and Heather Levinson, Vice President, Vertical Markets Consulting*
This will be an informal discussion centered on IDC's approach to creating custom market forecasting models for clients. In a period of heightened competition, it is important to understand your market opportunity at a very granular level.

Getting Your Message Out: Best Practices for Successful Content-based Marketing Programs, *Laura Nurzynski, Group Vice President, Go-to-Market Services, and David Shiang, Vice President, Infrastructure Software Consulting, and (Boston only) Keith Bagley, Director, Go-to-Market Services, and (Boston only) Andy Ware, Vice President, Software Consulting*

Join IDC Go-to-Market Services and IDC Consulting to discuss best practices in utilizing content-based marketing for audience education, awareness building, and lead generation.

Did you know that IDC builds multimedia programs spanning global, end-to-end campaigns as well as single call-to-action incentives? IDC also offers innovative sales- and partner-enablement solutions – from individual assets and educational tools to complete programs. Only IDC offers you the thought-leadership of 1,000 analysts worldwide, the leading edge experience of go-to-market consultants, and custom tailored sales, marketing, and educational assets – on any IT-related topic, for any region, targeted toward any audience. Join us to learn about IDC's best kept secret and how we work with teams such as yours.

Selling IT in the Current Economy: IDC Business Value Research, *Scott McLarnon, Group Vice President, Software, Services and Verticals Consulting, and Randy Perry, Vice President, Business Value Consulting*
With tight IT budgets, it is critical to be able to quantify the value of a new IT investment. IDC has a proven approach to measuring the business value of IT. This informal discussion will highlight some recent work we have been doing on virtualization, to illustrate the benefits of our approach.

Understanding the Consumer Buyer: IDC Custom Primary Research, *Michael Cousins, Vice President, Personal Systems Consulting, and Warren Childs, Consulting Director, Desktop Systems*
IDC conducts many custom primary research projects every year. Consumer research is growing in importance. This informal discussion will focus on some creative approaches we have taken to consumer market segmentation.

Pursue Deal Renewals and Generate Leads, *Alexander Motsenigos, Director, Global Services Markets and Trends, and (Boston only) Xiao-Fei Zhang, Research Manager, Global Services Markets and Trends*

Learn more about a powerful tool, which represents the world's largest database of IT and Business services deals, that can be used for lead generation, account development and deep customer segmentation, contract benchmarking, partner tracking and assessment, and competitor monitoring by industry, geography, and market.

Winning Strategies for Marketing Teams in 2009, *Michael Gerard, Research Vice President, Executive Advisory Group, and Seth Fishbein, Senior Research Analyst, CMO Advisory Research*

Once again, the will and perseverance of marketing will be tested in 2009; and only the strongest and best aligned marketing organizations will survive and excel. Join us for a discussion about what leading marketing organizations are doing to "weather the storm" and even leverage the challenging market and organizational unrest. IDC will share insight from its latest best practice research and annual marketing barometer investment study.

8:00 – 8:45 am Breakfast Briefings

IT Funding and Investment Practices in a Changed World, *Joe Pucciarelli, Program Director, Technology Financing & Executive Strategies, and Melinda Ballou, Program Director, Application Life-Cycle Management & ITEX, and Rick Villars, Vice President, Storage Systems*

The new economic reality means intense pressure on every aspect of business operations to curtail capital spending and reduce operating expenses. For IT organizations, the squeeze is especially difficult given the on-going need to support on-going operations while enabling new growth and cost-containment initiatives. In this presentation, we will share how IT organizations are evolving and changing their funding models, capital justification metrics, and IT leasing strategies and financing strategies in a turbulent economy.

- What are the latest trends and best practices impacting IT funding and investment strategies through 2012?
- How have market changes impacted the capital justification metrics and processes within IT organizations?
- How will IT leasing and financing best practices and strategies evolve through 2012?

How to Survive the Recession, *Stephen Minton, Vice President of Worldwide IT Markets and Strategies within IDC's Global Research Organization*

IT spending has been significantly impacted by the storms of economic recession since the second half of 2008. How do we best survive this period of global volatility and uncertainty? What are the bright spots and pockets of opportunity which IT suppliers need to focus on in the next 12-18 months? What strategic impact will the economic storm have on business IT spending plans, in both the short and long term?

Software Partner Ecosystems 2.0, *Michael Fauscette, Group Vice President, Software Business Solutions*

The session will take a look at best practices for building and managing a software partner ecosystem. Data collected by the SBS software partner, channel and alliances team in the 2008 vendor partner surveys will be used to show new and innovative partner management programs and practices. The influence of Web 2.0 social tools and concepts on ecosystem enablement will also be examined.

9:00 – 10:25 am General Sessions

9:00 – 9:15 am

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

9:15 – 9:50 am

The World at a Watershed: The Macroeconomic, Demographic, and Technology Landscape of the Next Decade, *John Gantz, Chief Research Officer and Senior Vice President*

ICT is at a watershed because the world is at a watershed in its relationship with technology. By the end of the decade, nearly half the planet will be using mobile devices; more than 25% will have access to the Internet, most with broadband connections and more outside the developed world than in. 7.5 billion devices, not counting RFID tags and sensors, will be communicating over networks; only 20% of these devices will be computers as we know them today. At the same time, a new cohort of Web 2.0-savvy individuals born after Web 1.0 was born will be entering the workforce, ready to connect any time, any place, for work or pleasure – and sometimes both at once. The dynamics of technology adoption

are changing fast, which means the dynamics of technology deployment will change fast, putting stress – in the form of simultaneous increased opportunity and increased risk – on suppliers. The converged entity we call the ICT market will be \$3 trillion and encompass a kaleidoscope of computer, communications, content, and services vendors all vying for growth in what could be tough economic times. In our first session of the day, IDC's Chief Research Officer will set the stage for the rest of the day by discussing these broad trends and their sometimes surprising implications for users, vendors, and, in fact, all of us.

9:50 – 10:25 am

2009: The Year of the Sales Rep, *Clare Gillan, Senior Vice President, Executive and Go-to-Market Programs*

Why make 2009 *The Year of the Sales Rep* rather than the year of the customer? Because “focusing on the customer” has led to too much talk and not enough action. “Solutions Selling” and “Trusted Partner” sales strategies of the past five years purported to respond to customer demand for more IT “partners” and fewer “vendors.” But IDC Enterprise Research Panelists (i.e. your B-to-B customers) tell us that the buying experience continues to be too transactional and not respectful enough of their time. While sales is often the most visible point of failure – the problems... and the solutions... lie at the intersection of marketing and sales.

A challenging economy and a maturing tech industry call for IT vendors to get it right with their customers – which can only happen after vendors get it right with sales. So, marketers, bring your sales colleagues. Sales, bring your marketing colleagues. Directions 2009 will not only tell you where the significant changes are in the IT industry and what it's like to be an IT customer – but how your marketing and sales organizations must transform to gain a sustainable edge in a changed industry.

10:25 – 10:55 am Networking Break, Coffee Chats & Demos, Email Kiosk

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

Open to all attendees by appointment. Visit the Analyst Connection Kiosk in the Analyst Meeting Pavilion to schedule your meetings. [Click here](#) for a list of analysts available for one-to-one meetings.

10:55 am – 12:05 pm General Sessions

10:55 – 11:30 am

Competing in Tomorrow's World: Harnessing the Power of the Digital Marketplace, *Danielle Levitas, Group Vice President, Consumer, Broadband and Digital Marketplace*

With the explosion of connected devices, social media technologies are transforming how we discover, share, create, play, and communicate personally and professionally, often blurring the lines. The amount of personal information we generate is growing at a phenomenal pace as each of us uses more devices, services, and media across more networks. Every transaction – from a call, an email, or a text message to a search, a click-through, or an acquisition – creates a wealth of information, which behavioral targeting can capitalize on. Some usage is redundant, some unique, depending on the device, network, location, or time of day. It is precisely this information that, when understood and married with customer segmentation, will drive the successful businesses of tomorrow.

11:30 am – 12:05 pm

Clouds and Beyond: Positioning for the Next 20 Years in Enterprise IT, *Frank Gens, Senior Vice President and Chief Analyst*

We've spent the last few years at IDC Directions forecasting and analyzing the emergence of a fundamentally new and disruptive enterprise IT marketplace – one that is distinctly different from the last 20 years: with radically new offerings, new key customer segments, and new business models and routes to market. And, exactly as we predicted at last year's Directions, 2008 has proved to be a pivot-point in this transition: with aggressive declarations by the industry's giants (and important disrupters) that they are ready to accelerate, rather than resist, this transition. So this marketplace – the one in which we'll all compete and grow for the next 15-20 years – is coming into place faster than you can imagine; in fact, much of the foundations are already here.

The models, strategies and offerings of the new enterprise IT marketplace – most visibly, the explosion in "cloud services" – are opening up fresh new growth opportunities, but are also inviting in many new competitors, and

challenging established players to step out of their comfort zones, rethink their most cherished success strategies, and take an expansive view of their customers, offerings and roles in the marketplace. In this presentation, we'll take the next step in describing what this new marketplace will look like, and what you need to do – right now, and for the next 24 months – to position for success for today and the next two decades.

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

Pick up a box lunch in the Analyst Meeting Pavilion 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 in the Analyst Meeting Pavilion to schedule your meetings. [Click here](#) 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.

Table 1: Acquisition and Pricing Trends in the Data Center, *Bill Roch, Research Director, Leasing and Pricing Evaluation Services*

Review current acquisition trends in procurement, from both vendor and end-user perspectives. Trends in sourcing perspectives regarding single vs. multiple vendors, spot buys vs. multi-year contracts, and renewed interest in acquisition cost benchmarking. Technologies covered include PCs, laptops, server, and storage.

Table 2: Application Development in a Contracting Economy, *Stephen Hendrick, Group Vice President, Application Development and Deployment Research*

This discussion will cover the issues that are impacting development and deployment and the strategies vendors can pursue to remain competitive.

Table 3: (Boston Exclusive) Corporate-liable and Individual-liable Devices: Enterprise vs. SMB, *Timothy Doherty, Associate Research Analyst, Small and Medium Business Markets: Mobility, and Sean Ryan, Research Analyst, Mobile Enterprise Software*

Discuss the movement towards corporate liability, bearing in mind the significant number of individual devices being brought into the workplace. How can businesses control how employees access sensitive information via their personal smartphones? What are the advantages/disadvantages of deploying devices? Can employers safely leverage employees' personal devices for productivity, or do the concerns outweigh the benefits?

Table 4: Emerging Service in the Digital Home, *Matt Davis, Program Director, Consumer Multiplay Services*

Consumers are beginning to adopt new services that fuse broadband networks, home networks and consumer electronic devices. This round table will discuss some of the near term emerging applications that will require greater customer support to install and maintain, as well as potential revenue streams for manufacturers and ISPs.

Table 5: (Boston Exclusive) Enterprise Networking Trends, *Meera Singh, Research Director, Worldwide Telecommunications, and Rena Bhattacharyya, Research Manager, Business Network Services*

Discussion of Business Network Services Trends. Includes topical areas such as Frame Relay, ATM, Ethernet, IP-VPN. Trends include general market trends such as migration patterns and growth patterns.

Table 6: Financial Crisis and Climate Change – Double Barreled Challenges for Energy, *(San Jose only) Karen Blackmore, Research Director, Customer Operations Strategies, Energy Insights, and (Boston only) Jill Feblowitz, Practice Director, Business Technology, Energy Insights*

This lunch roundtable will focus on how energy companies are handling their near term challenges. How will the credit crunch affect investments in new wells or oil sands? In smart metering and intelligent grid? What will be the fall-out for IT investments in the near term? In the next six months? Energy companies are convinced that new regulations on the environment are coming their way in the next year. Will regulatory mandates bring additional investment in IT, or will other projects be sacrificed? At the same time, energy companies are feeling the effects of climate change on their market and their infrastructure. Will new investment be required to handle these?

Table 7: (Boston Exclusive) Hosted Unified Communications, *Rebecca Swensen, Research Analyst, Enterprise Mobility and IP Communications Services*

This lunch roundtable discussion will focus on the trends in hosted unified communications. Some points worth discussing are: the value of hosted UC in a difficult economy; the attraction from an SMB perspective; the struggle in defining UC; thoughts around the Cisco's of the world entering the hosted market; the differences between hosted UC and hosted IP voice... are there any at this stage?

Table 8: How is Virtualization Expanding the Role of the Network?, *Abner Germanow, Director, Enterprise Networks, and Lucinda Borovick, Research Vice President, Datacenter Networks*

As server, storage, and client resources virtualize, what role does the network play in managing and securing those resources? From the datacenter to the remote branch virtualization is creating new opportunities for network equipment vendors to expand beyond traditional IT silos. Key areas of discussion will include: support for virtual machine mobility, infrastructure resiliency, and virtual client scalability.

Table 9: (San Jose Exclusive) IDC Semiconductor Market Update: Industry Consolidation Accelerating. How Will This Impact Investments in Emerging Technologies for Semiconductor Suppliers Moving Forward?, *Mario Morales, Vice President, Global Semiconductor Research*

This roundtable discusses:

- What is in store for growth for the remainder of this year? Will the market rebound in 2009? How long can we expect the slowdown in the U.S. and Europe to last and what is the overall impact to semiconductor demand?
- Which semiconductor markets will recover first? Which companies stand to gain as the market rebounds?
- Review the current Merger and Acquisition (M&A) activity in the Semiconductor area and predict which semiconductor markets will attract more activity in the future.
- What is IDC's view on the evolution of the foundry market? How do companies like TSMC and UMC stay ahead of SMIC, IBM alliance partners, and IDMs beyond 45nm?
- How is the current oversupply in DRAM and NAND going to impact revenue growth and bit demand over the next couple of years? Which DRAM and NAND suppliers are gaining market share and which suppliers will partner or consolidate?

Table 10: Industry Insights Looks at Sustainability, *Jeanne Capachin, Research Vice President, Global Banking and Insurance Practices, Financial Insights, and (Boston only) Kimberly Knickle, Practice Director, Emerging Agenda, Manufacturing Insights, and (Boston only) Leslie Hand, Research Director, Global Retail Insights, and (Boston only) Patricia McGinnis, Research Director, Corporate Banking, Financial Insights*

Many companies are working on corporate-wide sustainability initiatives, with most starting with energy efficiency programs focused on cost reduction at the same time bringing reductions in greenhouse gas. But our research shows that many other initiatives are underway, including those that create revenue opportunities. Join our roundtable to learn how companies are prioritizing their projects and to examine the role of IT in supporting sustainability and sustainability-related opportunities.

Table 11: (Boston Exclusive) Key Trends in Business Process Outsourcing (BPO) Services, *Mukesh Dialani, Senior Analyst, Worldwide BPO Services; and Lisa Rowan, Program Director, HR and Talent Management Services*

This lunch roundtable will provide insight into BPO services for the four key horizontal markets: Human Resources, Customer Relationship Management, Finance and Accounting, and Procurement. The discussion will include: Market trends; Vendor initiatives; Customer views and concerns; Analysis of contracts; Forecasts and growth for these markets; Increasing role of platforms; and Business Analytics – How big and real is the opportunity?

Table 12: Looking for New Ways to Segment the Opportunity for System Integration, *Sebastien Ruest, Vice President, Services Research, and Michael Fauscette, Group Vice President, Software Business Solutions*

Brief discussion on new ways that Service providers should segment the opportunity for System Integration or Solutions Integration. Discussion will compare and contrast the traditional way (ERP, CRM, SCM, BI, KM, FA, etc.) and the new ways: (1) Industry specific functions, 2) by internal activities such as QA, Testing, etc. and 3) by delivery methods (hosted vs. project based).

Table 13: Mobile Device Technology and Trends, *Stephen Drake, Program Vice President, Mobility and Telecom, and Will Stofega, Program Manager, Mobile Device Technology and Trends*

This table will discuss topics related to the mobile ecosystem including trends in devices, service trends, operators and mobile applications.

Table 14: New Media Trends and New Media Monetization, *Karsten Weide, Program Director, Digital Media and Entertainment, and (Boston only) Caroline Dangson, Research Analyst, New Media and Entertainment*

Join IDC's new media analysts for a discussion of the most important disruptors of the new media space and the impact they will have on existing and future revenue streams – pick their brains on trends such as ad networks, behavioral and semantic ad targeting, social advertising, and mobile and video advertising.

Table 15: Remote Branch of the Future, *Matt Healey, Research Manager, Software and Hardware Support Services, and (Boston only) Laura DuBois, Program Director, Storage Software*

The remote branch is a strategic location for the enterprise. However, with business operations in many distributed remote and branch office locations, comes the need for IT infrastructure and support services to support customers, business processes, business transactions and the like. Analysts will discuss key trends and opportunities around the remote branch.

Table 16: "Storageonomics" 2009 – The Economics of the Storage Industry, *Benjamin Woo, Vice President, Enterprise Storage Systems*

With the current and fluctuating state of the economy, is the storage industry truly immune to downturns? What are the major impacts of the credit crisis? What can organizations do? What are the alternatives – both shorter and long term? What are the implications of alternatives to traditional capital investments in on-premise storage solutions?

Table 17: Taking Control of Your File-based Storage, *(San Jose only) David Reinsel, Group Vice President, Storage and Semiconductor; and (Boston only) Noemi Greyzdorf, Research Manager, Storage Software*

Unstructured data is growing at a double digit clip and organizations are looking for ways to tame the beast. This discussion will focus on technologies, processes, and tools that have been designed to address the challenges associated with file-based storage.

Table 18: (Boston Exclusive) The Government IT Market, Bright Spot in a Weak Economy?, *Shawn McCarthy, Director, Government Vendor Programs, Government Insights*

This round table will focus on the government Information Technology market, including Federal, Defense Department, and state and local. It will look at which types of projects are receiving full funding, which have been placed on the back burner during tough economic times, and how specific technologies are changing the government buying and planning process.

Table 19: Unix Servers: Mission-Critical "Engines" for the Cloud, *Jean Bozman, Research Vice President, Enterprise Servers, and (Boston only) Steve Josselyn, Research Director, Global Enterprise Server Solutions*

Unix servers remain an important computing platform, with nearly 40% of all server spend worldwide based on Unix server acquisition. Importantly, Unix servers provide high availability (HA), security and other characteristics needed for mission-critical workloads and their protection. What is not as well known, or appreciated, is that Unix servers have an important role to play in cloud computing, as consolidation "engines" for customer workloads offered by services providers – and as virtualization engines that ensure IT flexibility and support for business agility. This roundtable will focus on the Unix server market, how it's changing – and what IT and business value attributes it brings to customers – as well as the "ecosystem" of hardware, software and services providers, and channel partners, that surround the Unix server platform itself.

Table 20: Valuing Business Process IP in Software, Service, and Software-within-a-service, *Henry Morris, Senior Vice President, Worldwide Software and Services Research, and (Boston only) Amy Konary, Research Director, Software Pricing, Licensing, and Delivery*

Buyers have multiple choices to solve business process problems ranging from on-premise applications to service-led solutions – either software as a service or business process outsourcing. Service providers are looking for ways to "industrialize" their offerings by building up assets in the background so that the offering can scale and so that margins can improve over pure labor-based delivery. Software providers are seeking to use these service companies as channels for their software (their process IP) – i.e. software-within-a-service. What is needed is a business model that fairly values the IP and also meets the needs of the service company to be able to use the software in a multiplexed fashion. This session considers the new business models emerging to tackle this issue.

Table 21: Web Services and Emerging Web Platforms: Fueling Change in the IT Marketplace, *Sandra Rogers, Program Director, SOA, Web Services, and Integration*

Web based solutions are emerging in many flavors, fueled by architecture and technology shifts such as Web services and SOA. Discussion on trends in services-based computing, including cloud and platform-as-a-service, Web 2.0, mashups, and other trends are shifting focus beyond architecting and provisioning business functions and technology functions as services to innovations in consumption patterns of these services for differentiation and value.

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

Pick up a box lunch in the Analyst Meeting Pavilion before your session.

The Channel of the Future, *Janet Waxman, Vice President, Hardware Channels Research, and Christina Richmond, Research Manager, Channels and Alliances: Hardware Infrastructure*

The channels and routes to market do not appear, on the surface, to change as much or as often as the technology markets they serve. While this is true, IDC believes that there is a very subtle undercurrent of change that will cause a fairly dramatic shift, one vendors would be well served to keep their eye on. Because this has not yet fully emerged, it requires a careful amount of listening and deep study of trends that are underfoot. It is a forthcoming idea and those who are unprepared for this will be hit with it at tsunami force. In this session, IDC will provide insight into how suppliers can prepare for this sea change, what this will mean to the partners and alliances in the market today, and additional areas they will need to invest in for future success.

Changing SMB Technology Priorities – New Rules for New Opportunities, *Ray Boggs, Vice President, Small/Medium Business and Home Office Research, and (Boston only) Merle Sandler, Research Manager, SMB and Home Office Markets*

The changing economy worldwide is focusing new attention on the SMB market opportunity. Despite financial vulnerability, SMBs have historically been slow to cut IT spending in bad times and quick to boost spending in good ones. But will past performance be reflected in future behavior? And what critical qualities will SMB customers be looking for in their technology providers moving forward? Join IDC's SMB team in a discussion of the latest research findings that can help guide market strategy targeting SMB customers.

Health 2.0, *Lynne Dunbrack, Program Director, Health Payer Research, Health Industry Insights*

The application of Web 2.0 technologies to the healthcare industry is dramatically changing how stakeholders share information, collaborate and interact with the healthcare system. Health 2.0 is clearly poised to have a profound impact as the disruptive technologies of Web 2.0 become more mainstream and are more fully incorporated into the strategies of healthcare stakeholders. Join us for a presentation of a framework for Health 2.0 as defined by Health Industry Insights and a discussion about the state of the Health 2.0 market and its key players.

The Impact of the New Administration on Government IT Spending, *Teresa Bozzelli, COO and Managing Director, Government Insights*

Join Teresa Bozzelli, who is monitoring the transition to a new administration and the subsequent impact on Government IT spending. Learn what initiatives may be at risk, which may actually see an increase in spending requests, the impact of the continuing resolution on civilian agencies, and the overall impact of the bailout on key initiatives.

Selling to Banks During Financial Turmoil, *David Potterton, Vice President of Global Research, Financial Insights*

This session will explore the current market conditions, IT products with upside demand and potential marketing approaches to dealing with banks.

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

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1:30 – 2 :10 pm Track Sessions

Track 1: Hypervisors: The Start of Virtualization, but Hardly the End, *Al Gillen, Research Vice President, System Software*

The hypervisor market brought broad awareness to virtualization. And while the hypervisor is the most visible and most celebrated layer, it is hardly the only component or dimension that must be considered when executing on a virtualization strategy. Other dimensions must be considered including system virtualization, storage virtualization, and application and client virtualization. Then, there's the more complex considerations such as on-line and off-line management of guest images, and the ever-problematic licensing terms and conditions for operating systems, middleware and applications. Finally, and hardly least important, is the need to develop a strategy for how virtualization will be consumed and leveraged – whether it's for basic consolidation, for availability purposes, SOA or more.

Track 2: The Transformation of the Mobile Experience, *Scott Ellison, Vice President, Mobile Consumer Services*
About every 5 years since its inception, the mobile industry undergoes a profound transformation. 2007-2010 is another one of those periods, and this time the transformation is centered on the mobile experience. Touchscreen devices, mobile widgets, fully functional web browsers, accelerometers, GPS, and ubiquitous 3G broadband networks are just some of the key factors transforming the mobile experience. This session will discuss mobile experience transformation drivers, new mobile user behaviors, as well as the key market opportunities and challenges for the CE, IT, and service provider industries in delivering a compelling mobile consumer experience.

Track 3: Marketing Transformation, *Rich Vancil, Vice President, Executive Advisory Group*
IDC is observing more dramatic shifts in marketing organizations and go-to-market campaigns than ever before. Traditional marketing structures, operations, and tactics are all being stress-tested by the demands of the marketplace. How does your marketing agenda stack up against the competition? Are you still marketing by product line or are you executing with the latest Campaign Management techniques? Is your company ahead of or behind the curve in the expansion of your Digital Marketing? Have you deployed a Sales Enablement role yet? Learn from the marketplace leaders on how to drive greater ROI out of your 2009 marketing budgets and staff.

Track 4: The IT Infrastructure of the Future: New Technologies in a Constrained Market, *Matt Eastwood, Group Vice President, Enterprise Platforms*
In 2009, IT organizations will face more pressure than ever to reduce costs, improve service levels and maximize IT flexibility. Although IT transformation is difficult in any business climate, the challenge is clearly exacerbated by the advent of new technologies such as virtualization, multi-core, blades, etc. In this session, Mr. Eastwood will look at changing workload deployment patterns, the advent of new service delivery platforms such as the cloud, and the impact economic constraints will have on the shape of the IT infrastructure landscape.

Track 5: Sustainability, Green IT and Climate Change Management: Bringing Together Opportunities Within ICT, *Vernon Turner, Senior Vice President of IDC's Enterprise Infrastructure, Consumer and Telecom Research*
Today's concerns over long term economic and environment sustainability will bring out a very wide range of opportunities for the ICT industry. The impact of a new energy policy by the U.S. federal government will require more than smart grids. A new network infrastructure based on inexpensive broadband and wireless connectivity will become the backbone for a smart ICT infrastructure that will affect consumers, enterprises and drive innovation across the economy as a whole. This session will explore the opportunities in the data center, the office, the network and, of course, the home to make the dynamic infrastructure a smart place to do business while living within an eco-friendly environment.

Track 6: Where Do You Fit? Changing Roles and Optimizing Position in the Hosted Services Ecosystem, *Rona Shuchat, Research Director, Application Outsourcing Services, and Robert Mahowald, Research Director, On-Demand and SaaS Research*
IDC charts the evolving framework of hosted ecosystems, from hosted application management to SaaS, PaaS and other cloud-based models. Core roles and responsibilities of the supplier ecosystem will be examined, highlighting key criteria that will need to be supported by ISVs, platform and service providers as scalability, reliability, security and other factors weigh in. As this roadmap unfolds, vendors need to find their optimum position in the ecosystem, keeping an eye on how their core competencies, investment strategy and partnership options will influence their future direction and growth potential.

Track 7: Telecom Carrier Transformation: Evolution to a Services-oriented Business Model, *(San Jose only) Chris Lewis, Group Vice President, International Telecoms and Networking, and (Boston only) Courtney Munroe, Group Vice President, Worldwide Telecommunications*
The telecommunications market is rapidly evolving. Service Providers face several critical challenges in transforming their infrastructure and business models. They must rapidly respond to shifting demand dynamics, price sensitive consumer requirements, and demanding Enterprise solutions. This session will analyze Service Provider options, and provide IDC's unique outlook for service provider prospects.

Track 8: Application Development and Deployment Buying Pattern Analysis, *Maureen Fleming, Program Director, Business Process Automation and Deployment*
For the past year, IDC has been collecting data on deals for application development and deployment software, supplemented by detailed customer and vendor interviews. Based on information from this database, this session highlights key trends in what people are buying around the world as reflected in software deals. How do buying patterns differ in major regions? How do large enterprise deals compare with small-medium enterprise deals in terms of the

factors that most impact purchasing decisions? The changing patterns observed provides an insight into buyer priorities in these volatile times.

2:20 - 3:00 pm **Track Sessions**

Track 1: The Role of Virtualization in the Storage Platform, *Richard Villars, Vice President, Storage Systems*

Capitalizing on companies growing use of server virtualization dominated developments in the storage industry over the past year. The future direction of the storage market, however, increasingly is dominated by the exploding need for file-based storage within companies, their interest in leveraging storage in the cloud for disaster recovery, and the voracious storage requirements of the content depots that are building cloud storage solutions for businesses and consumers. In this session, Mr. Villars will discuss how the twin forces of virtualization and serverization are reshaping storage system designs and opening up new opportunities for storage, server, and application software suppliers to deliver next generation information management solutions. Topics discussed will include: Scale out storage solutions, Advanced File and Information Management, Virtualization, DR and the Cloud.

Track 2: Consumer-Centric Media: How to Monetize the Next Phase of New Media, *Karsten Weide, Program Director, Digital Media and Entertainment*

Say good-bye to the media world that we grew up in. Advances in technology phase-shift media into a new era in which consumers control what they consume, when, where and how. This media revolution opens up new exciting vistas of opportunity for ICT companies just as many of their traditional businesses begin to mature. Come along on a journey that explores the major technological disruptors in new media, changes in consumer media behavior, and case studies of how companies like Cisco, Microsoft and Nokia take advantage of this amazing new media world.

Track 3: 2009 – How to Win in Challenging Times: A Recipe for Sales Success, *Lee Levitt, Director, Sales Advisory Practice*

In 2009, successful sales organizations will reallocate both financial and human resources to optimize sales productivity and efficiency. The primary theme of this optimization will focus on the processes that improve the specific capabilities and performance of individuals within the sales organization, and increase the leverage between marketing and sales. Mr. Levitt will discuss the critical success factors for this initiative, including:

- Improving the quality and timeliness of actionable information and knowledge provided to (and from!) sales professionals
- Re-evaluating and reconfiguring the application of direct sales, inside sales and partner resources to better meet buyer expectations
- Refocusing first line sales managers on managing and coaching rather than on selling
- Aligning marketing and sales to focus on specific, shared goals that drive sales productivity
- Implementing change management processes to guarantee the effectiveness of these initiatives

Track 4: Transforming the Datacenter: Consolidation, Pervasive Virtualization and Energy Optimization, *Michelle Bailey, Research Vice President, Enterprise Platforms and Datacenter Trends*

The datacenter continues to face pressure from escalating technology introductions and a lack of standards in design. This challenge for IT customers over the next 5 years will be compounded by the weak economic climate that will ultimately make funding difficult and place even more pressure on IT groups to drive higher levels of automation in the wake of an increasingly thin employee base. IDC will present its latest research on datacenter futures, including the trends in datacenter consolidation, power and cooling, new datacenter design points and the complexity resulting from pervasive virtualization. In addition, Ms. Bailey will outline the potential impact of cloud computing models on traditional Enterprise datacenters and the ongoing investment in this new scale-out model.

Track 5: Going Green When it Comes to Hardcopy Output is Good for Business, *Angèle Boyd, Group Vice President, General Manager, Imaging/Output Document Solutions and SMB*

Print devices are very likely the least green-friendly IT devices in use and this session will discuss how this IT sector is being addressed from both a supply and demand side. Print devices are particularly egregious to the environment because it is not only the device itself that is subject to energy consumption and manufacturing/disposal green metrics, but the resources (e.g. energy, water) used to produce and dispose of consumables (paper, ink, toner) that are as critical. In this session, you will learn what manufacturers are providing to customers in terms of product and services and customer response, and how they are achieving green status that is good for business.

Track 6: Unlocking the Potential of Industry-Specific BPO, Moderator: David Tapper, Vice President, Outsourcing and Offshore Services Market Research; and Panelists: Jeanne Capachin, Research Vice President, Global Banking and Insurance Practices, Financial Insights, and Janice Young, Program Director, Payer IT Strategies, Health Industry Insights, and (San Jose only) Karen Blackmore, Research Director, Customer Operations Strategies, Energy Insights, and (Boston only) Jill Feblowitz, Practice Director, Business Technology, Energy Insights, and (Boston only) Barry Rabkin, Senior Research Analyst, Insurance Practice, Financial Insights

Outsourcing of industry-specific processes has been gaining momentum. The challenge for vendors looking to unlock the potential of these markets is understanding the uniqueness in meeting the demands of industry-specific processes across a diverse set of industries. This session will involve a panel of industry experts that will shed insight into what it takes to win BPO opportunities across multiple sectors from finance and insurance to healthcare and energy. Topics that will be addressed include the state of the market; unique requirements needed to win deals by industry; ability for a provider to compete in multiple industries; and customers readiness in using newer models like SaaS, cloud and utility computing. The goal of this session is to provide vendors with an overview of key factors they need to consider when looking to succeed in growing an industry-specific BPO business.

Track 7: Rise of the 'Mobile Internet': Operators Confront the Coming Capacity Crunch, Shiv Bakhshi, Director, Mobile Devices Technology and Trends

The mobile industry is in a state of transition – from a voice-centric to a data-centric world – following the rising salience of smartphones, increasing availability of high-bandwidth mobile networks, and the advent of new market entrants seeking to capitalize on mobile users' growing appetite for consuming data – i.e., accessing the Internet – in a mobile environment. The rise of the "mobile Internet" – industry's shorthand for the convergence in the content delivery space and the increasing importance of mobility as a platform – poses a major conundrum for mobile operators who must prepare for the coming capacity crunch. How do they reduce and manage the cost of data delivery on their mobile networks and evolve their business and revenue models to deal with the emerging reality of the mobile Internet? Dr. Bakhshi delineates some of the key challenges that confront leading mobile operators and discusses what they might do to transform their networks and business models.

Track 8: Social CRM, Michael Fauscette, Group Vice President, Software Business Solutions, and (Boston only) Mary Wardley, Vice President, Enterprise Applications and CRM Software

The concept of relationship is being put to the test as it never has been before. Historical CRM relies on an inside-out perspective of managing the customer from within the organization through transactional software. However, social media has inverted this relationship and organizations are navigating a steep learning curve as to how to best leverage and manage the active lives their customers live in social media. The next generation of CRM moves beyond transactions to facilitate customer and partner conversations and aids in building true ecosystems. The session discusses best practices in building a brand, managing a brand, and identifying positive (and negative) online brand influencers in order to build a relationship that benefits both the organization and the customer leveraging these new technologies.

3:10 - 3:50 pm Track Sessions

Track 1: Extending Virtualization from Servers to Clients, Michael Rose, Research Analyst, Enterprise Virtualization Software

Virtualization software has seen tremendous adoption within enterprise datacenters, and its capabilities are enabling greater IT flexibility and new computing models; such as cloud computing. Join IDC's Michael Rose as he discusses the ways in which IT organizations are extending the use of virtualization into their desktop environments. Michael will not only discuss the benefits associated with using virtualization with desktops, but the challenges that organizations have, and will, face in the endeavor.

Track 2: The Coming Storm: Facing the Challenges of Supporting New Services to the Connected Home, Matt Davis, Program Director, Consumer Multiplay Services

The U.S. communications marketplace is moving into a new phase where consumer electronics and communications networks are converging. This integration is driving new opportunities for revenues, but it will also result in higher customer support costs in order to install, configure, troubleshoot, and support the technology that delivers these applications. Consumer electronic manufacturers and communications service providers will face an increasing challenge in managing customer expectations and making sure these new services stay up and running. At stake is customer satisfaction, brand loyalty, and the future development of the connected home – not to mention the bottom line of service providers and technology suppliers.

Track 3: Executive Panel: Best Practices in Marketing and Sales Effectiveness, Moderator: Michael Gerard, Research Vice President, Executive Advisory Group; and Boston Panelists: Eric Andrews, Vice President WW Demand Generation, IBM Corporate Marketing; and Aaron Davis, CMO, Schneider Electric; and Heather Loisel, Vice President Global Marketing Operations, CSO Business Operations, SAP AG; and San Jose Panelists: Jack Androvich, Senior Director, Marketing Research, Planning & Operations, Autodesk; and Heidi Melin, CMO, Polycom; and Wes Wasson, CMO, Citrix

Yes, ICT is at a watershed, with ICT vendors having to deal with new risks, rules and opportunities. No where is this more evident than within marketing and sales as they continue to struggle with alignment – between each other, within the organization and with the market. In the first two sessions of Track 3 we have provided the latest research and insight into how best practice marketing and sales leaders are responding to these challenges. Now, stay with us for an interactive discussion to hear directly from a panel of "battle-hardened" executives who have proven their ability to navigate their way through difficult times. Join Michael Gerard and a panel of four senior practitioners for techniques to preserve budgets, execute with less, and to successfully "make it to the other side" of the tech downturn.

Track 4: Funding and Financing Datacenter Transformation – Options and Realities, Joe Pucciarelli, Program Director, Technology Financing & Executive Strategies

Intense pressures to curtail capital spending and further reduce operating expenses challenge organizations like no time in recent memory. For IT departments, the squeeze is especially difficult given the ongoing need to support business innovation, sustain technology implementations that reduce operating expenses, and comply with evolving regulatory compliance and "Green IT" initiatives. In this presentation, we review best practice IT funding models, chargeback, capital justification metrics and IT leasing/financing strategies for a changed world.

Track 5: If Storage Needs are Still Exploding, Can the Storage Industry Keep a Green Profile, David Reinsel, Group Vice President, Storage and Semiconductor

Fact: Storage growth requirements are outpacing the growth in native storage technology in terms of capacity per device. In simple terms, this dynamic results in rapid deployment of storage hardware, which ultimately results in increasing carbon emissions. There are a number of strategies emerging quickly to help bring more green into storage. These strategies span the IT environment from datacenter designs, to software, to hardware. In this session, David Reinsel will explore the increasing storage footprint, its impact on green, and the top solutions to help curb the energy appetite of storage.

Track 6: Your Cloud or Mine? Service Opportunities for Customers Choosing to Build Their Own or Outsource the Infrastructure, Moderator: Rebecca Segal, Vice President, Global Services Markets and Trends; and Panelists: David Tapper, Vice President, Outsourcing and Offshore Services Market Research, and Matt Healey, Research Manager, Software and Hardware Support Services

New technologies are fueling a rush to modernize the infrastructure to gain greater efficiencies, lower cost, and more flexibly serve the business. Whether customers choose to build their own or outsource, significant opportunities exist for service providers, particularly those that are leveraging technologies like virtualization and SOA to build or provide the "infrastructure of the future." Rebecca Segal will moderate a panel with David Tapper, IDC's outsourcing expert, and Matt Healey, IDC's expert on infrastructure services, who will discuss and debate the huge opportunity to either build the "cloud" for customers, or leverage the cloud to provide the next wave of outsourcing.

This panel discussion will cover topics such as:

- Where is outsourcing headed and how are the most successful infrastructure outsourcers leveraging new technologies and delivery models?
- What types of infrastructure services are customers clamoring for and what are the underlying technologies enabling these new services?
- Where are the real opportunities for services providers?

Track 7: Managed Services: Beyond Commoditization, Curtis Price, Program Vice President, Infrastructure Services
Service Providers chart a new course with innovative Business Solutions. The managed network services value proposition revolves around improving the overall cost and operational efficiency of traditional voice and data network functionality. This session will explore whether Service Providers can successfully deliver on the promise of enabling enterprises to accelerate the acquisition of critical communications capabilities with minimal capital investment and distraction.

Track 8: Governance, Compliance and Sustainability, Kathleen Wilhide, Research Director, Compliance and Business Performance Management Solutions, and (San Jose only) Karen Blackmore, Research Director, Customer Operations Strategies, Energy Insights, and (Boston only) Jill Febowitz, Practice Director, Business Technology, Energy Insights

Fortune 500 companies are barraged with dozens of major standards of corporate accountability, responsibility, and sustainability. The rapid increase in the amount of communications focusing on sustainability topics such as carbon footprint and going "green" signal a shift occurring today: sustainability is now a critical part of many companies' corporate strategies.

Specifically, organizations are expected to measure and report on major standards including the Global Reporting Initiative, Dow Jones and FTSE4Good, among others, yet the cost and complexity often makes this difficult.

Software driven processes are emerging to support an organization's sustainability strategy, calibrate progress, and quickly detect gaps in governance and sustainability practices. This session looks at how software will play a role in managing sustainability efforts, and will provide a deeper dive into how energy companies approach one key area of sustainability – energy and the environment. Energy companies are facing public and regulatory pressure over their impact on the environment, especially in greenhouse gas emissions. In this relatively new area, energy companies are using a combination of technologies to measure, monitor, model and manage carbon emissions. Much can be accomplished with technology coupled with the culture and business process changes required to manage carbon effectively.

4:00 - 5:15 pm **Closing Keynote**

The Big Switch, *Nicholas Carr, author of Does IT Matter? and, most recently, The Big Switch: Rewiring the World, from Edison to Google*

"Cloud computing" has become the buzzphrase of the moment in the technology world. Acclaimed author Nicholas Carr goes beyond the hype to describe the economic, competitive, and technological forces that are leading to a fundamental reconsideration of the way IT assets are deployed, managed, and used. He looks at what can be learned from the rise of centralized utilities in the past, at the flaws in traditional IT strategies, and at the new wave of cloud services and providers. He'll provide practical advice for how to capitalize on the cloud today, how to prepare for greater changes down the road, and how to avoid being led astray by the hype.

5:15 - 5:30 pm **IDC Closing Remarks**

Crawford Del Prete, *Executive Vice President, Worldwide Research*