IDC'S 41ST ANNUAL IT INDUSTRY BUSINESS BRIEFING

Directions06

Agenda for a Shrinking Globe: Seizing Opportunities in a Connected World

March 2, 2006
John B. Hynes Convention Center
Boston, Massachusetts

March 7, 2006
San Jose Convention Center
San Jose, California

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Directions06

Agenda FOR A SHRINKING GLOBE

Seizing Opportunities in a Connected World

Globalization has provided organizations with an opportunity to both contain costs as well as pursue new markets. For years now, outsourcing specific functions to workers outside of the US has allowed organizations to reduce operational costs and increase profits.

Advanced global networks have made it possible for these organizations to expand virtually anywhere in the world. And as the emerging countries develop economically, those countries become new market opportunities for IT and telecommunications suppliers. The world is smaller, but the opportunities are growing. In this conference, we will examine the dynamics of this shrinking globe, and take an in-depth look at the many opportunities in this globally-connected world.

IDC's annual Directions conference is recognized as the industry's premier event that delivers an informative and actionable perspective of the issues shaping the technology industry, and the resulting impact on the businesses of IT providers and users. This year's conference will provide a detailed outlook of the IT and telecommunications markets with particular emphasis on global opportunities. Through a compelling mix of keynotes, topic tracks, special interest sessions, and breakfast briefings, Directions 2006 offers in-depth analysis of specific segments of the technology industry.

Who Should Attend?

Directions is attended by senior level executives from IT companies who are responsible for:

- EXECUTIVE MANAGEMENT
- MARKETING/SALES
- EBUSINESS/INTERNET/INTRANET
- PRODUCT MANAGEMENT
- DISTRIBUTION CHANNELS
- MARKET RESEARCH
- BUSINESS DEVELOPMENT
- STRATEGIC PLANNING
- INFORMATION TECHNOLOGY MANAGEMENT
- OPERATIONS
- COMPETITIVE ANALYSIS

Key Benefits of Attendance

IDC's annual Directions conference has earned the reputation of being the most important industry event of the year, with more than 3,000 IT suppliers and professionals attending worldwide during 2005. Directions 2006 attendees will benefit from the following offerings:

- **Market intelligence and advice for helping you find the path to new opportunities**
- **Specific predictions about the winning (and losing) vendors, products, technologies, and strategies of the future**
- **The opportunity to meet and compare notes with your colleagues and potential business partners throughout the industry**
- **Eighteen breakout sessions covering six topic areas, along with six special interest sessions, allowing you to customize your agenda for your specific information needs**
- **New data on actual 2005 growth, and forecasts for 2006 and beyond**
- **Access to IDC's analysts through presentations, one-to-one meetings, Q&A sessions, luncheon, breaks, and closing reception**
- **Access to Directions presentations via idc.com, which contains the audio and visuals from all presentations**

Directions06

Agenda for a Shrinking Globe: Seizing Opportunities in a Connected World

AGENDA AT A GLANCE

March 2, 2006 • Boston, MA and March 7, 2006 • San Jose, CA

7:30 - 9:00 am	Registration, Continental Breakfast and Exhibit Viewing

BREAKFAST BRIEFINGS

8:15 - 8:45 am	***The Tides of Change: Worldwide IT Spending Growth*** *Stephen Minton, IDC* *Anna Toncheva, IDC*	***In-Depth Analysis: US IT Spending Imperatives*** *Juan Orozco, IDC* *Jessica Goepfert, IDC*	***The Mobile Worker in the Mobile Enterprise*** *Stephen Drake, IDC* *Kevin Burden, IDC* *(Boston only)*	***Client Virtualization*** *Bob O'Donnell, IDC* *(San Jose only)*	***Putting the Cart After the Horse: Plan Your Channel Sales Effectively*** *Matt Lawton, IDC*	***Customer Financing Programs: Nice to Have, Need to Have or Must Have?*** *Joe Pucciarelli, IDC*	

9:00 - 9:15 am	**IDC Introduction and Welcome** - *Kirk Campbell, President and Chief Executive Officer, IDC*
9:15 - 9:50 am	**IT & Communications: Disruption Ahead** - *John Gantz, Senior Vice President and Chief Research Officer, IDC*
9:50 - 10:25 am	**Mobility Matters: Complexity, Chaos and Ceaseless Change in a Converging World** - *Shiv K. Bakhshi, Ph.D., Director, Wireless & Mobile Network Infrastructure, IDC*
10:25 - 10:55 am	Networking Break in Research Pavilion and One-to-One Meetings
10:55 - 11:30 am	**Shaking It Up: What Disruption in the Software Industry Means for the Future of IT** - *Amy Konary, Program Director, Software Pricing, Licensing, and Delivery, IDC*
11:30- 12:05 pm	**The Dynamic Enterprise: Getting It Out of First Gear** - *Frank Gens, Senior Vice President, Research, IDC*
12:05 - 1:30 pm	Lunch Buffet in Research Pavilion

SPECIAL INTEREST SESSIONS

12:40 - 1:20 pm	***Marketing ROI - Placing the Right Bets for Marketing Success*** *Rich Vancil, IDC* *Bob Johnson, IDC*	***The Shifting Tide to Solutions in the SMB Market – Time to Move the Sand Castles?*** *Ray Boggs, IDC*	***New Playbook: Dynamic IT and the Integrated Banking Enterprise*** *Maggie Scarborough, Financial Insights, an IDC Company*	***Government Trends, Trades and Targets*** *Teresa Bozzelli, Government Insights, an IDC Company*	***IT Spending in the Health Industry*** *Scott Lundstrom, Life Science Insights, an IDC Company*	***IT Spending Trends in Manufacturing*** *Bob Parker, Manufacturing Insights, an IDC Company*	***How Energy Prices and Policies are Impacting Energy Industry IT Investments*** *Rick Nicholson, Energy Insights, an IDC Company*

TRACK SESSIONS

	TRACK 1 *Telecom Infrastructure for a Connected World*	TRACK 2 *Visions of Mobility in a Highly Connected World*	TRACK 3 *Applications For The Next Generation*	TRACK 4 *Seizing Opportunities in Services*	TRACK 5 *Dynamic Enterprise*	TRACK 6 *Critical Issues for Information Management*	TRACK 7 *Consumer Trends (San Jose only)*
1:30 - 2:10 pm	***Mash It Up: VOIP 2.0 Meets Web 2.0*** *Will Stofega, IDC*	***Mobility, Work and Play in a Brave New Converged World*** *Randy Giusto, IDC*	***Hot Workplace Technologies Ignite Next Gen Applications*** *Evan Quinn, IDC*	***Challenges and Opportunities of Globalization for Services Companies*** *Bob Welch, IDC*	***Multi-core Processing in the Enterprise: Delusion or Disruption for IT?*** *Vernon Turner, IDC*	***Compliance and IT Governance as a Catalyst for Information Management Investments*** *Scott Lundstrom, Life Science Insights, an IDC Company*	***Technology and Consumers - What Do They Really Want?*** *Schelley Olhava, IDC*
2:20 - 3:00 pm	***From Bundles to Immersion: The Evolving Consumer Multi-play Opportunity*** *Mark Winther, IDC*	***Fun on the Run: How Wireless Entertainment is Changing the Way We Play*** *Scott Ellison, IDC*	***Service Oriented Architecture: Promises vs. Reality*** *Sandy Rogers, IDC*	***The Changing Profile of Global BPO Deals: Past, Present, Future*** *Katrina Menzigian, IDC*	***Insane Security Tricks: Teaching New Dogs Old Tricks*** *Chris Christiansen, IDC*	***Building the Star Trek Computer Through Data Integration: Ask a Question, Get One Correct Answer*** *Carl Olofson, IDC*	***Next-Gen Broadband Services and Home Networking: Redefining the Value of the Pipe*** *Amy Harris Lind, IDC*
3:10 - 3:50 pm	***Value over IP in the Enterprise: Will the Intelligent Network Shift the Flow of IT Profits?*** *Abner Germanow, IDC*	***The Myth of the Mobile Mass Market*** *Dana Thorat, IDC*	***Success and Disruption: The Broader Impact of Open Source Software*** *Al Gillen, IDC*	***Building an Optimal Service Delivery Model to Ensure Customer Satisfaction in a "Flat" World*** *David Tapper, IDC*	***Deploying Services In Networks and Systems To Generate Profit*** *Curtis Price, IDC*	***Consolidation and Content: Making Storage "Application-Aware"*** *Richard Villars, IDC*	***Consumer Entertainment Services in a Multiplay World*** *Greg Ireland, IDC*

4:00 - 5:00 pm	**Closing Keynote - China, India and the Future of Everything** - *Robert Reich, Economist, Professor, Author and Former Secretary of Labor*
5:00 - 5:15 pm	**IDC Closing Remarks** - *Gigi Wang, Senior Vice President, Strategy, IDC*
5:15 - 6:30 pm	Networking Reception

REGISTER BY FEBRUARY 3rd AND **SAVE $400!**

GENERAL SESSIONS

7:30 AM – 9:00 AM
Registration, Continental Breakfast, and Exhibit Viewing

8:15 AM – 8:45 AM
Breakfast Briefings

9:00 AM – 9:15 AM
Welcome and Introduction
Kirk Campbell, President and Chief Executive Officer, IDC

9:15 AM - 9:50 AM
IT & Communications: Disruption Ahead
John Gantz, Senior Vice President and Chief Research Officer, IDC

Beneath a deceptively calm outlook for the IT and communications markets, trends are afoot that will reshape the industry—and disrupt the unprepared—for years, if not decades to come. They start with the "flattening" of the world under globalization and extend to the unintended consequences of our increased connectedness through the Internet, convergence, and invisible computing. China, mobility, offshoring, peer-to-peer, open source, India, sensors, wireless, Google, demographics, oil prices, security, Metcalfe's Law, Dynamic IT -- how do they all fit together? Out of which challenges will come what opportunities? In this session, IDC's Chief Research Officer will analyze the interplay between a "shrinking globe" and our "connected world," pull out the key trends and their implications, and thus offer an excellent starting premise for the 30-plus sessions to follow.

9:50 AM - 10:25 AM
Mobility Matters: Complexity, Chaos and Ceaseless Change in a Converging World
Shiv K. Bakhshi, Ph.D., Director, Wireless & Mobile Infrastructure, IDC

Once synonymous with cellular technologies, the construct of mobility is now under siege as different market players seek to redefine the term in a manner that serves their economic goals and purposes. The most visible manifestation of mobile communications – the cell phone – has, in recent years, emerged as the singular laboratory for testing the limits of technological convergence. And, by the end of this decade, more than half of the world's population is likely to be drawn within the embrace of mobile communications. Leveraging IDC's extensive research in various aspects of mobility, Dr. Shiv K. Bakhshi will discuss the implications that this pervasive, and continuously changing, idea of mobility and the attendant technological convergence may hold for various economic actors engaged directly and indirectly in the increasingly complex and chaotic market for mobile communications.

10:25 AM- 10:55 AM
Networking Break in Research Pavilion and One-to-One Meetings

BREAKFASTBRIEFINGS 8:15 PM – 8:45 AM

The Tides of Change: Worldwide IT Spending Growth
Stephen Minton
Vice President of Worldwide IT Markets and Strategies, IDC

Anna Toncheva
Program Manager and Economist, IT Markets and Strategies Group, IDC

In-Depth Analysis: US IT Spending Imperatives
Juan Orozco
Senior Analyst, IT Markets and Strategies, IDC

Jessica Goepfert
Program Director, Vertical Business Units, IDC

Client Virtualization
(San Jose only)

Bob O'Donnell
Research Vice President, Clients and Displays, IDC

The Mobile Worker in the Mobile Enterprise
(Boston only)

Stephen Drake
Program Director, Mobile Software, IDC

Kevin Burden
Research Manager, Mobile Markets, IDC

Customer Financing Programs: Nice to Have, Need to Have or Must Have?
Joe Pucciarelli
Research Director, Pricing and Leasing Evaluation, IDC

Putting the Cart After the Horse: Plan Your Channel Sales Effectively
Matt Lawton
Director, Software Business Strategies, IDC

GENERAL SESSIONS

10:55 AM - 11:30 AM

Shaking It Up: What Disruption in the Software Industry Means for the Future of IT

Amy Konary, Program Director, Software Pricing, Licensing, and Delivery, IDC

Business models in the software industry are in a state of flux–software as a service, subscription, open source licensing and other models are here to stay, and new ecosystems are forming based on a set of business criteria that many established ISVs and their partners can not meet today. In this session, Amy Konary will share IDC research and insights into how the software industry is changing in the face of this disruption, and will identify challenges and opportunities that will result for software vendors as well as for the rest of the interconnected IT industry.

11:30 AM - 12:05

The Dynamic Enterprise: Getting It Out of First Gear

Frank Gens, Senior Vice President, Research, IDC

Creating a dynamic enterprise continues to be an overarching priority for most CEOs and CIOs. And the arsenal of IT tools to enable that transformation – service-oriented architectures, composite applications, virtualization, online delivery, global IT services sourcing, and more – is expanding almost daily. Yet most would agree: the transition is going pretty slowly. Frank Gens will share IDC research and insights into how the customer adoption is really going, and what it will take to accelerate the market's transition to the dynamic enterprise.

12:05 PM - 1:30 PM

Lunch Buffet in Research Pavilion

SPECIAL INTEREST SESSIONS

12:40 PM – 1:20 PM

IDC's special interest sessions examine the hot new areas shaping the IT industry. Bring your lunch and join us as we share with you the insight and opportunities in the following areas:

Marketing ROI - Placing the Right Bets for Marketing Success

Rich Vancil, Vice President, CMO Advisory Research, IDC
Bob Johnson, Vice President, Customer Experience Research, IDC

What are the marketing programs and practices that have the most impact with tech buyers? How much should you invest in these efforts? What kind of returns can you expect for this investment? IDC's latest research on effective buyer influence, presented by Bob Johnson, will be analyzed in conjunction with the latest research on tech marketing investment and allocations, presented by Rich Vancil. This combined view will provide attendees with a framework for the ROI of Marketing. New research presented in this session will be based on extensive surveys from IDC's 3,500 member Customer-Experience Panel, and from IDC's CMO Advisory Tech Marketing Benchmarks annual surveys.

The Shifting Tide to Solutions in the SMB Market – Time to Move the Sand Castles?

Ray Boggs, Vice President, SMB Research, IDC

The traditional advice for sand castle builders is worry about the tide, not the waves. For those serving SMB customers, the tide is beginning to favor those with comprehensive solutions, not just point products. Or are things more complicated than that? Join Ray Boggs for an examination of how SMBs are thinking about their technology investments and what steps they are planning, whether small (under 100 employees) or mid-sized (100-999 employees). And of course from the technology supplier's perspective, what will be the winning approaches to connecting the dots in the worldwide SMB market?

SPECIAL INTEREST SESSIONS

New Playbook: Dynamic IT and the Integrated Banking Enterprise

Maggie Scarborough, Research Manager, Corporate Banking, Financial Insights, an IDC Company

Institutions and financial services firms must move to the next generation of application architecture to remain standing in 2010. To stay in the game, institutions must be both low cost operators and growth generating innovators. Back and front offices are big and complicated and service-oriented architecture (SOA) is required to create the flexibility to adapt to challenging economics, unrelenting regulation, and changing business models. Learn about the dynamic IT rationales, approaches, and successes of institutions and financial services vendors building the integrated banking enterprise.

Government Trends, Trades and Targets

Teresa Bozzelli, COO/Managing Director, Government Insights, and IDC Company

Reduced budgets, increased demands for government services, and the ever growing conflict between security and transparent access are key drivers for the future of information technology innovation and investments. Government buyers must constantly evaluate the multi-layered web of political, management, and technical challenges to determine where and how to invest in new information technology resources and services. With the complexity of public sector policy, a mishmash of leading edge and legacy technology, and a sometimes weak reputation for delivering value, government buyers are looking for assistance to simplify the decision making and solve their technology riddles. This session will examine the top issues facing the government buyers, explore new buying models, and discuss opportunities for information technology solutions and services.

IT Spending in the Health Industry

Scott Lundstrom, Research Vice President, Life Science Insights, an IDC Company

Compliance, innovation, and cost management are pushing technology back to the top of the health industries priority list. These pressures are accelerating investment in new technologies on a broad basis. New technologies will drive increasingly personalized and managed care for patients utilizing advances made in the bio/pharma industry as well as advancements in personalized treatment at the healthcare provider. Technologies like remote health management, electronic medical records, and advanced analytics promise to increase the quality of care while minimizing costs. Health Industry Insights will share its research on the worldwide IT spending for the health industry, as well as detailed information on user spending plans for the year to come. There will be a special focus on the changing nature of IT investing including a look into planned adoption of specific new technologies.

IT Spending Trends in Manufacturing

Bob Parker, Vice President, Research, Manufacturing Insights, an IDC Company

Manufacturing Insights will share its research on the business environment and associated performance imperatives in the manufacturing industry. The presentation will discuss how these business imperatives are influencing IT spending patterns across all manufacturing segments including automotive, aerospace, chemical, high tech, and consumer goods. Manufacturing Insights will share its IT Economics model and how manufacturing companies are using the model to shape their IT strategy.

How Energy Prices and Policies are Impacting Energy Industry IT Investments

Rick Nicholson, Vice President, Energy Insights, an IDC Company

High oil & gas prices along with the passage of the Energy Policy Act of 2005 in the U.S. have kept the energy industry in the media spotlight. However, few analyses have adequately covered the impact these changes will have on IT investments by energy and utility companies. Although it would be easy to assume that record high industry profits will immediately translate into record high IT spending, this would be an overly simplified and incorrect assumption. This session will examine the business and regulatory dynamics within the energy industry that are driving IT and related technology investments across the energy value chain.

IDC'S RESEARCH PAVILION AND ONE-TO-ONE MEETINGS WITH IDC ANALYSTS

Network with the people who provide you with valuable insight and analysis throughout the year. IDC analysts will be on hand in our special Research Pavilion to discuss the IT industry issues that are most important to you and your company. Attendees will have the opportunity to sign up for IDC Analyst one-to-one meetings during designated break times. **Sign-up sheets will be available in each research booth, scheduled on a first-come, first-served basis. The pavilion will be open from 7:30 am to 2:00 pm.**

TRACK SESSIONS

Concurrent track sessions will provide comprehensive insights into specific industry segments. This year's tracks include: Telecom Infrastructure for a Connected World, Visions of Mobility in a Highly Connected World, Applications For The Next Generation, Seizing Opportunities in Services, Dynamic Enterprise, Critical Issues for Information Management and Consumer Trends (in San Jose only).

TRACK 1: TELECOM INFRASTRUCTURE FOR A CONNECTED WORLD

1:30 PM - 2:10 PM

Mash It Up: VOIP 2.0 Meets Web 2.0

Will Stofega, Research Manager, VOIP Services, IDC

Only two years after VOIP introduced a true blending of voice and data networks, we are already looking at the next generation of both VOIP and the Web. IDC believes that VOIP 2.0 will be an integral part of Web 2.0, and that the new products and services that are being introduced today will disrupt the traditional telecommunications business models. Already we are beginning to see voice communications look like instant messaging and revenue models for voice services that look like revenue models for email services. The next generation of VOIP and the Web will give rise to new mergers and partnerships that will result in products and services that encapsulate the concepts of both. This session will examine how future products will change telecommunications business models, which companies are best positioned to capture the benefits, and what the near-term and longer-term scenarios are.

2:20 PM – 3:00 PM

From Bundles to Immersion: The Evolving Consumer Multi-play Opportunity

Mark Winther, Group Vice President and General Manager, Worldwide Telecommunications, IDC

Today consumer convergence competition is driven by video channel count, cheap voice minutes and broadband download speeds. As competition intensifies, all players are promising to transform the landscape through compelling and diverse content, technologies and services. This session will assess leadership strategies for subscriber growth, churn mitigation, and ARPU as service providers move from today's simple bundles to delivering tomorrow's immersive multi-play experience. Service innovations highlighted will include: mobilizing broadband, content roaming, enhanced call treatments via presence and location, IPTV, peer-to-peer video, video messaging.

3:10 PM – 3:50 PM

Value over IP in the Enterprise: Will the Intelligent Network Shift the Flow of IT Profits?

Abner Germanow, Program Manager, Enterprise Networking, IDC

Enterprise IP networks are in transition from best effort service to mission critical conduits of communications. This new focus is driving network vendors to develop new technologies and linkages up the IT stack in order to solve application delivery and mobility challenges while bringing new levels of efficiency and reliability to computing and storage. In this session Abner Germanow will review the challenges and opportunities that arise as core IT services flow into the network and the number of interactions between the network other IT entities grow.

TRACK 2: VISIONS OF MOBILITY IN A HIGHLY CONNECTED WORLD

1:30 PM – 2:10 PM

Mobility, Work and Play in a Brave New Converged World

Randy Giusto, Group Vice President, Mobility, Computing, and Consumer Markets, IDC

After mobility, convergence is the term in vogue these days. And, convergence is manifest at multiple levels – at the level of the network, at the level of devices and at the level of applications. In this session, we address the potential impact of fixed/mobile convergence on devices, applications, and services, both in the consumer and the enterprise realm. Mr. Giusto's presentation will address the following topics: When will true converged devices with VOIP/WiFi capabilities debut, and what applications and services will they enable? How will these devices and innovative services change the way we work and play? How will emerging devices and applications alter the behavior of the enterprise user and the mobile professional? How will enhanced audio, video, and improved device storage change the way we amuse and entertain ourselves? When will mobile TV be widely available, and how will it impact our mobile experience?

TRACK SESSIONS

2:20 PM – 3:00 PM
Fun on the Run: How Wireless Entertainment is Changing the Way We Play
Scott Ellison, Director, Wireless and Mobile Communications, IDC

Wireless entertainment services constitute a booming, young market that is rapidly changing the way we amuse ourselves. As wireless services morph from voice-centric to data centric offerings, new personal entertainment devices, market opportunities, and behavior patterns are emerging. Mr. Ellison will discuss the central role that entertainment services will play in the wireless evolution and how they differ across the major regions of the world. A view of the wireless entertainment future is provided, one in which we are likely to see cell phones that double as portable music players and as "virtual" baby sitters, print-quality digital cameras, multi-player gaming devices – a future in which we are likely to see TV beamed to our mobile phones.

3:10 PM – 3:50 PM
The Myth of the Mobile Mass Market
Dana Thorat, Research Manager, Mobility Metrics, IDC

Mobility is one of the leading growth drivers of IT and consumer markets today, and is likely to remain so over the rest of this decade and beyond. But the market for the next generation mobility offerings is more fragmented than ever before. Different market segments have very different needs, and these needs will dictate, as they should, the way these segments are targeted. Ms. Thorat will examine some of the hotter, and emerging market segments for mobile solutions, including the youth market, mobile professionals, high-end consumers, and enterprise buyers as well as the segment best identified as technology-savvy women. What makes each of these groups so special? What are their buying preferences? How should you market solutions to them, and capture and retain their interest?

TRACK 3: APPLICATIONS FOR THE NEXT GENERATION

1:30 PM – 2:10 PM
Hot Workplace Technologies Ignite Next Gen Applications
Evan Quinn, Group Vice President, Applications, IDC

The service-oriented quasi-revolution forgot about one key ingredient: the user! Fortunately, flamed by forces like Google, Web 2.0, the Semantic Web, and a cornucopia of emerging content standards like DITA, the enterprises may finally feast on applications concocted with users' tastes in mind. From fully baked initiatives like IBM Workplace and SAP xApps, to nearly out of the oven goodies like a Google/Sun desktop and Microsoft Office Live, plus fusion cuisine efforts like Microsoft/SAP Mendocino and Oracle's Unified Workplace concept, IDC looks into the cupboard of hot workplace technologies that will change the consumption of applications going forward. Will the MISO vendors – Microsoft, IBM, SAP and Oracle – reinvent their fastfood workplace franchises quick enough to keep their customers coming back for more? Or will the Googles, Adobes, Suns, Digital Harbors and a long list of other bistro vendors and partners wrest away the hungry hordes? This presentation considers the next major cycle of the applications markets, and how to seize those opportunities.

2:20 PM – 3:00 PM
Service Oriented Architecture: Promises vs. Reality
Sandy Rogers, Program Director, SOA, Web Services, and Integration, IDC

One would be hard pressed to find any IT industry discussion today without mention of Service Oriented Architecture (SOA). And it appears that nearly every technology vendor claims to have an SOA strategy. But how much of this fervor is based on vision versus reality? What stage is the industry in providing concrete offerings today? And are vendors' messages aligned to where enterprises may actually be in their course of embracing dynamic solutions enabled by SOA? This session looks at the rate of adoption for SOA and Web services; key areas of business and product innovation; opportunities, risks, and challenges for vendors and enterprises; and how SOA will potentially disrupt the IT ecosystem and overall technology consumption model.

3:10 PM - 3:50 PM
Success and Disruption: The Broader Impact of Open Source Software
Al Gillen, Research Director, System Software, IDC

Open source and community-based development is no longer considered a rogue threat. Indeed, open source development is now mainstream, but it also has evolved into numerous distinct collaborative development processes that are bringing products to market faster than ever. Whether it's Linux, the LAMP stack, MySQL – or application software – open source is creating new competition and significant disruption in the industry. This session dissects several open source projects, and looks at the impact the resulting products are having on the established competitors, and considers how the industry will evolve, both in response to, and to leverage, open source development.

TRACK SESSIONS

TRACK 4: SEIZING OPPORTUNITIES IN SERVICES

1:30 PM - 2:10 PM

Challenges and Opportunities of Globalization for Services Companies

Bob Welch, Group Vice President and General Manager,
Worldwide Services Research, IDC

Global Services companies are quickly evolving their strategies and capabilities to deal with the rapidly increasing requirement to operate around the world in a variety of dimensions. They have to increase their capabilities to serve companies operating in a global model. It includes building, acquiring and operating their own assets to leverage labor and skill arbitrage. Possibly the most difficult task is to engineer their selling and delivery capabilities to serve markets in developing, lower cost countries. We expect to see an unprecedented amount of collaboration, convergence and conflict in the Global Services marketplace as traditional players move in this direction, to be met by new players in the online and developing worlds.

2:20 PM - 3:00 PM

The Changing Profile of Global BPO Deals: Past, Present, Future

Katrina Menzigian, Vice President, Business Solutions
and BPO Services Research, IDC

The BPO market is moving fast and each year brings new trends around the engagement of BPO services. Key issues for the industry in 2006 revolve around the global scope of BPO deals, the globalization of BPO service delivery, the continuing shifts in the BPO competitive landscape, and the emergence of new BPO market opportunities. This session will leverage IDC's insight into BPO contracts to project the future direction of the BPO market and to provide a framework for mapping onto BPO buyer needs in 2006.

3:10 PM - 3:50 PM

Building an Optimal Service Delivery Model to Ensure Customer Satisfaction in a "Flat" World

David Tapper, Research Director, IT Outsourcing and Utility Services,
and Global Offshore Services, IDC

Driven by changes in technology, the world of service delivery is undergoing its own radical transformation. This transformation involves customer ability to access not just new types of service delivery models, ranging from utility computing and SaaS (software-as-a-service) to online providers and VNOs (virtual network operators), but also services from any location on the planet. Additionally, customers can increasingly procure and integrate new services more quickly and flexibly than ever before. The goal of this session will be to provide companies, which are looking to compete effectively as providers of IT and business process services, a framework of the key capabilities of service delivery that will be needed to compete in this rapidly changing world. Additionally this session will highlight how factors such as service innovation, transformation, localization, globalization and flexibility will play key roles in meeting customer requirements needed to optimize productivity, ensure market expansion and minimize costs.

TRACK 5: DYNAMIC ENTERPRISE

1:30 PM – 2:10 PM

Multi-core Processing in the Enterprise: Delusion or Disruption for IT?

Vernon Turner, Group Vice President and General Manager,
Enterprise Computing, IDC

Are vendors confused and confusing their IT customers on the potential advantages of multi-core processing? Is it crazy to think mainframes become extinct because of multi-core processors? Do more cores equate to better IT value? Recent research shows that a broad range of IT professionals have concerns over the benefits that multi-core processing will bring to their environment and consequently their acceptance of this technology could stall this emerging industry. Are we delivering a solution without a business need? This session examines the appetite and challenges for multi-core processing within the IT user community; a first glance at the thoughts from the venture capital community about the opportunities created by multi-core processing; a competitive landscape map of the hardware, software and application vendors in this industry; and the requirements to succeed!

2:20 PM – 3:00 PM

Insane Security Tricks: Teaching New Dogs Old Tricks

Christian A. Christiansen, Program Vice President,
Security Products & Services, IDC

In the past, IT security discussions were dominated by keeping the bad guys out of corporate networks. Now, there is no inside or outside because "outsiders" like partners, contractors, and suppliers hold access rights almost equivalent to company employees. Moreover, "guests" such as customers and consultants are often granted temporary access rights. In other words, practically everyone is an insider. In the words of the immortal Pogo, "We have met the enemy and he is us." This session looks at the variable levels of trust that are appropriate for insiders, identification tricks for categorizing privileged users, and flexible solutions for dealing with insider threats from poorly disciplined users to criminally-malicious rogues.

3:10 PM – 3:50 PM

Deploying Services In Networks and Systems To Generate Profit

Curtis Price, Program Director, Network Services, IDC

As corporations migrate to new technologies, they are increasingly looking to outside suppliers to help manage the complexity of integrating new technology investments with existing systems. Subsequently, providing a full suite of network life-cycle services have taken center stage and become a key source of differentiation for technology suppliers. This session looks at demand-side requirements for network services and the strategies being pursued by technology suppliers to meet customer requirements.

TRACK 6: CRITICAL ISSUES FOR INFORMATION MANAGEMENT

1:30 PM – 2:10 PM

Compliance and IT Governance as a Catalyst for Information Management Investments

Scott Lundstrom, Research Vice President, Life Science Insights, an IDC Company

Compliance and governance issues are having a significant impact on the management, deployment, and architecture of enterprise systems. Many companies are facing multiple compliance initiatives that will force substantial ongoing enhancements and changes into the IT systems supporting the business. Governance will become increasingly important as we attempt to manage this change. Service oriented architectures, advanced analytics, and event management are all technologies that can play a role in support of governance and compliance. Quality frameworks like ITIL for IT and Six Sigma for business processes provide a solid basis for evaluating change and are gaining mind share as tools to be used in the change management process. Leading organizations have recognized that effective IT governance and compliance create unique architectural challenges that must be addressed to create a flexible platform to support the dynamic needs of the business.

2:20 PM – 3:00 PM

Building the Star Trek Computer Through Data Integration: Ask a Question, Get One Correct Answer

Carl Olofson, Research Director, Information Management and Data Integration, IDC

Computer users and enterprises have long demanded that their IT satisfy fundamentally conflicting demands: that data systems be fast, consistent, comprehensive, easy to use, and cheap. Mainframes delivered scalability and consistency, but proved expensive and hard to use. Distributed systems proved much cheaper and easier to use, but caused a Balkanization of corporate data, leading to information anarchy. An entire industry, called Business Intelligence (BI), has grown up around simply solving the problem of deriving business planning value from data stored on computers. Now, redundant systems from mergers and acquisitions, the demands of data security, regulatory pressures, etc., are bearing down, making this complex, confused data environment a serious enterprise-wide problem. To solve this problem, vendors are offering technologies used in BI for data warehouse generation, technologies used for federated data query, and technologies involving metadata used to govern database application development. This session will examine how and why these technologies are being used for strategies such as enterprise data warehousing, enterprise information integration (EII), and master data management (MDM).

3:10 PM – 3:50 PM

Consolidation and Content: Making Storage "Application-Aware"

Richard Villars, Vice President for Storage Systems Research, IDC

For many companies, consolidated business applications and digital content are the largest consumers of new storage capacity. They pose new challenges with regard to the management storage assets and to the protection of all types of information. This session identifies storage technologies and solutions that will help companies more cost-effectively consolidate, manage, protect, and archive growing volumes of digital content. It also analyzes emerging efforts to boost application performance and availability by integrating intelligent storage systems with business-critical applications.

TRACK SESSIONS

TRACK 7: CONSUMER TRENDS (WEST COAST ONLY)

1:30 PM – 2:10 PM
Technology and Consumers - What Do They Really Want?
Schelley Olhava, Program Manager, Consumer Markets, IDC

The entire value chain of the consumer electronics industry, from hardware OEMs to service providers to content creators, almost always assume that consumers, or at least the more tech savvy segments, are ready and willing to embrace new technologies and services. But beyond anecdotal evidence, our own thoughts and opinions and those of our friends and family – do we truly understand how the consumer views and accepts technology? Using this question as a basic premise, Ms. Olhava's presentation will examine consumer attitudes towards technology and current and future adoption of technology and services based on recent IDC surveys. Other key issues that will be addressed are the importance of brand, pricing, and entertainment consumption on consumers' purchase decisions and usage.

2:20 PM – 3:00 PM
Next-Gen Broadband Services and Home Networking: Redefining the Value of the Pipe
Amy Harris Lind, Program Manager, Consumer Broadband Markets, IDC

2005 ushered in the era of ubiquitous broadband access, with broadband plummeting to near or below dial-up prices in many countries and more than half of online households globally connecting to the Internet via broadband. Now, service providers face their most formidable challenge yet – how to differentiate access services, monetize the broadband network, and avoid commoditization of the pipe to the home. It's time for service providers to embrace next-gen broadband services and the promise of home networking to redefine broadband as more than just access. In this session, Ms. Lind will examine how broadband service providers can leverage the proverbial pipe to the home to create much-needed service differentiation, drive ARPU, and expand into broadband-enabled content aggregation and delivery and management solutions.

3:10 PM – 3:50 PM
Consumer Entertainment Services in a Multiplay World
Greg Ireland, Senior Research Analyst, Consumer Markets: Video, IDC

As service providers transition from single to multiplay operators, they face increased competition from traditional rivals and from emerging competitors in both the online and device marketplaces. Consumers are beginning to demand new ways to access entertainment content and more flexible usage scenarios. This means service providers are under increasing pressure to develop new business models, create differentiated services and embark on seemingly contradictory strategies in order to attract and retain subscribers. This session will look at the usage environments for consumer entertainment services while outlining provider strategies for addressing both the legacy mass market and the technically literate power users who will demand more from their cable operator, telco, or satellite provider. How can service providers compete in the multiplay world? How must the ecosystem of devices, content, and access evolve? What will be the points of tension between broadband and traditional pay TV? And, is content delivery moving from closed to open systems?

4:00 PM – 5:00 PM
Closing Keynote: China, India and the Future of Everything
Robert Reich, Economist, Professor, Author and Former Secretary of Labor

China is our second-largest creditor and it's becoming the manufacturing center of the world. India is fast becoming a world center for software development. The two are the most populous nations in the world. If present trends continue, in thirty years, China will be the largest economy in the world, and India will have displaced the U.S. as a center for high-tech development. Should we care? If so, what should we do about it? And what are the specific implications for technology companies?

5:00 PM – 5:15 PM
Closing Remarks
Gigi Wang, Senior Vice President, Strategy, IDC

5:15 PM – 6:30 PM
Networking Reception

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VENUES:

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www.idc.com/outsourcing06

IDC Business Intelligence and Business Process Forum West: Making BI Operational
April 3-4, 2006—Santa Clara, CA
www.idc.com/biwest06

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April 19, 2006—New York, NY
www.idc.com/mpmeast06

IDC-Kahn Consulting Compliance in Information Management Forum West: Controlling Legal Risk and Creating Business Value
May 10-11, 2006 –Santa Clara, CA
www.idc.com/kahnconsulting/compliancewest06

IDC-Energy Insights—Energy and Utilities Forum
May 17, 2006—Chicago, IL
www.idc.com/energy-utilities06

IDC-Manufacturing Insights RF-Enabled Sensor Networks Forum: Opportunities and Challenges in Combining RFID and Other Sensors
June 7-8, 2006—Boston, MA
www.idc.com/rf-sensornetworks06

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IDC Business Intelligence and Business Process Forum East: Making BI Operational
June 12-13, 2006—New York, NY
www.idc.com/BIeast06

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June, 2006—San Jose, CA
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June 14-16, 2006—Boston, MA
www.idcITexpo.com

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September 20, 2006—New York, NY
www.idc.com/securityforum06

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September 21-22, 2006—New York, NY
www.idc.com/kahnconsulting/compliance06

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www.idc.com/hrforum06

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