

~ CONFERENCE AGENDA for SANTA CLARA ~
[subject to change]

Directions 2017

Tech Industry Redefined: The Rise of the DX Economy

7:15 am Registration and Breakfast

7:15 am – 4:00 pm Pavilions

Join analysts, product specialists, and peers to discuss business practices and experience demos that will help you realize future growth potential. Pavilions are open until 4:00 pm for walk-up service and discussions. All attendees are welcome to stop by without appointment.

IDC Custom Solutions Pavilion

Visit the IDC Custom Solutions Pavilion any time throughout the day and meet with experts who can help you harness the power of IDC's global research, thought leadership, and innovative best practices to drive your business forward. Learn how IDC Custom Solutions practice areas can assist you to develop and deliver programs designed around your specific business goals using a foundation of research and insights across technologies, geographies, and industries as well as hear from experts who focus on strategy, sales and marketing, buyer behavior, and business measurement and management.

IDC Tracker Pavilion

Stop by the IDC Tracker Pavilion where our team of experts can introduce you to IDC's new Tracker products and tools to utilize IDC Tracker data, including the online Tracker Query Tool. IDC's Trackers provide accurate and timely market size, vendor share, and forecasts for hundreds of technology markets around the globe. Using proprietary tools and research processes, IDC's Trackers are updated on a semiannual, quarterly, and monthly basis. Trackers are provided to clients in our online Web query tool as well as through user-friendly Excel deliverables.

8:00 am – 8:30 am Power Breakfasts

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

Ready or Not! SMBs Take Digital Transformation to the Next Level, Ray Boggs, Vice President, SMB Research

While digital transformation (DX) is often framed as a concern for large enterprises, it is also practiced in small and midsize firms (SMBs). A growing number of SMBs are asking: "How do we move company performance to the next level by employing digital technologies to support organizational, operational, and business model innovation?" Many SMBs already have DX pieces in play in different departments — cloud and mobile IT deployments are transforming specific business processes in sales, finance, and collaborative team projects. Yet developing a DX strategy, along with centralized coordination and management, remains a challenge. Join Ray Boggs for an update on the SMB DX journey and how the next generation of SMB leaders will compete using the latest IT solutions.

Business Value Impact of DX and What It Means for Your Sales/Marketing Strategy, *Randy Perry, Vice President, Business Value Strategy Practice, and Nancy Selig, Vice President, Interactive Platforms*

Over the past 12 months, many organizations have initiated their digital transformation strategies and are already receiving financial and business benefits. But it is a long journey, and most organizations are still asking key questions: "How do I align my IT strategy with my digital transformation strategy to accomplish business priorities? How can investments in digital transformation make my organization more innovative and competitive? What is the value of digital transformation, and does it justify the investment?" In this session, Randy Perry and Nancy Selig will draw from recently completed research to discuss how IT providers will need to align their products and services to their customers' digital transformation strategies and deliver real financial value. Furthermore, to be a successful proponent, they will have to undergo their own digital transformation.

India Opportunity in 2017, *Jaideep Mehta, Managing Director, India and South Asia*

Over the past decade, India has emerged as a significant economic force, with GDP in excess of \$2 trillion and growth rates in excess of 7%. Today, it is the fastest-growing major economy in the world and attracts more foreign direct investment than any other nation. The IT markets have been growing in lockstep, with spend now approaching \$100 billion. Every large technology firm has made India a key strategic market. In parallel, the digitalization wave in Indian enterprises offers new opportunities, to the incumbents and start-ups equally. Finally, government initiatives and programs such as Digital India and Smart Cities are creating entirely new markets for technology companies. As these programs gather pace, it is imperative to understand their nuances and capitalize on the large opportunity they offer. This session will synthesize the opportunities offered by the Indian market along all the previously mentioned vectors. It will seek to make the audience aware of the possibilities and how to leverage them.

The Future Services Landscape, *Michael Versace, Research Director, Digital Strategy Consulting*

Digital trends will completely reshape consulting services over the next few years. At this power breakfast, we'll describe the foundations for future services and IDC's views on how hybrid, platformed, and subscription-based professional services are being designed and delivered in a market experiencing hyper-growth. Future services examples will be presented, along with industry and market drivers, plus buyer perspectives and priorities across top service-consuming sectors/industries.

The New World of Programmatic TV Advertising, Explained, *Karsten Weide, Program Vice President, Digital Media and Entertainment*

Brands and agencies are facing a challenge: Nothing rivals TV's audience reach and its effectiveness, yet its targeting capabilities are very limited, and under 25-year-old audiences, defecting from TV to video, are hard to find. New programmatic TV technology gives you access to both traditional TV viewers and those hard-to-find millennial and Gen Z users and, by applying digital data to TV buying, improves targeting and campaign performance. Join IDC's Karsten Weide for a tour of programmatic TV advertising. What is it? Why should you do it? How does it work? What does not work? How do you best plan media campaigns in programmatic TV?

8:45 am – 10:20 am General Sessions

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

Dawn of the DX Economy and the New Tech Industry, *Frank Gens, Senior Vice President and Chief Analyst*
In 2017–2020, we'll see the emergence of digital transformation at a macroeconomic scale — the dawn of the "DX economy." In this new economy, enterprises in every industry will compete based on their ability to hit and exceed a new set of demanding performance benchmarks enabled by cloud, mobility, cognitive/AI, the Internet of Things, immersive interface, and other technologies — and the digital transformations enabled by these technologies. In the DX economy, every growing enterprise — no matter its age or industry — will become a "digital native" in the way its executives and employees think and operate. And tech industry leaders will need to align with this new customer reality — bringing the right technologies, ecosystems, and customer insight to the fight for IT market share.

In this session, Frank Gens will share IDC's vision for the DX economy, the "digital native" enterprise, and the changing tech industry landscape. He'll cover the most important 3rd Platform technologies driving the DX economy, the next technology revolution — the 4th Platform — emerging on the horizon, and the financial impact 3rd (and 4th) Platform technologies and digital transformation will have on the global economy and in every industry. The dramatically different — "digital native" — operating model for enterprise success in the DX economy will be explored as well as the new rules, roles, and requirements for the tech industry in the DX economy — and how the IT competitive landscape will shake out.

Information, Industry Clouds, and the Next Industrial Revolution, *Scott Lundstrom, Group Vice President and General Manager, Software, Health and Government*

Information is the new oil in this next generation of the industrial revolution. Information at scale is fueling opportunities for innovation in every process and in every market. Intelligence, insight, and actionable analytics create an information-based economy where outcomes are optimized and value is evaluated as part of every interaction. Increasingly, industry clouds become the channels for information delivery, as well as the platforms for information aggregation. Every industry is in the midst of an information-fueled digital transformation that will redefine the relationship of customers with products, services, and information.

New information-based revenue streams require new skills and capabilities. Companies need to assess the opportunities to participate in the new channels. What is the vision behind the value in the data, and how does management focus on new revenue stream creation? Chief data officers will increasingly focus on data monetization and delivering value from information to customers. New technologies, talent, and processes become essential to our success in creating these new ventures. Distribution of new digital products requires new channels, and understanding the rules of the emerging industry cloud market will be essential to our successes.

10:20 am – 10:50 am Networking Break and Pavilions

10:20 am – 10:50 am Analyst One-to-One Meetings

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

10:50 am – 12:00 pm General Sessions

AR/VR: Charting the Business Impact of the Next Human/Machine Interfaces, *Tom Mainelli, Program Vice President, Devices and AR/VR*

Augmented reality and virtual reality (AR/VR) technologies are set to change the way humans interact with both the digital and the physical worlds in a profound way and in the process will herald massive changes in business. For example, designers will collaborate in virtual studios to create real-world products, service personnel will tap augmented blueprints to repair complex machinery, and doctors will perform surgeries with the assistance of specialists a world away. In just a few years, companies will have either integrated these technologies into their businesses or will find themselves playing catch-up.

The AR/VR space represents a massive opportunity, but the next few years won't be easy. The industry must create entirely new user interfaces, engineer next-generation display technologies, digitize a world full of unconnected physical objects, harvest and analyze unimaginable amounts of contextualized data, and build the back-end infrastructure necessary to make AR/VR devices work. Only then can we set about doing the real work of rethinking the fundamental processes behind human creativity and business value creation. In this session, Tom Mainelli will explore the current status of the AR/VR market and he'll discuss today's key players, platforms, and technologies, as well as examine early success stories. Finally, he'll point the way forward, outlining key challenges and opportunities for technology companies ready to embrace the future and the ultimate endpoint manifestation of digital transformation.

Competing in and with Asia as the DX Economy Emerges, *Sandra Ng, Group Vice President, Practice Group, IDC Asia/Pacific*

Digital transformation is driving the rise of a new economy that is poised to attain macroeconomic scale and impact. As in other parts of the world, the emerging "DX economy" will become the core of what industry leaders in Asia/Pacific do and how they operate. Asia/Pacific will see a new digital battlefield take shape as every growing enterprise strives to become "digital native" in the way its executives and employees think and act. The Asia/Pacific region is diverse, with three clusters of DX users: digital transformers, technology optimizers, and technology disruptors. In this session, Sandra Ng will highlight the most updated DX dynamics in Asia/Pacific and perhaps more importantly how U.S. players (both technology and industry/consumer brands) can compete in this challenging and complex region. She will share examples of new business/operating models coming out of the region and the direct competitive impact for technology brands both inside and outside of Asia/Pacific. She will also examine how U.S. (non-technology) industry and consumer brands can gain greater market share and profitability in Asia/Pacific as the digital battlefield intensifies in the DX economy.

12:00 pm – 1:30 pm Lunch and Lunchtime Sessions

Pick up a box lunch before your meeting or session.

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

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

12:15 pm – 1:20 pm Lunch Roundtables

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

Table 1: Advanced Technologies — Mapping Ecosystems for Computer Vision and Sensors, *Michael Palma, Research Director, Enabling Technologies and Semiconductors*

This roundtable will examine the developing ecosystems for computer vision and sensor technologies. We will look at core technology providers and their semiconductor, hardware, software, and services partners. The objective will be to understand the ecosystems forming to provide these advanced capabilities to device manufacturers and to help these manufacturers make informed sourcing and partnering decisions.

Table 2: Artificial Intelligence: A New Age for Marketing and Advertising, *Gerry Murray, Research Director, Marketing and Sales Technology, and Karsten Weide, Program Vice President, Digital Media and Entertainment*

Artificial intelligence (AI) takes both marketing and advertising to their next stage. In marketing, AI will deliver advanced personal assistants, shopper bots, and a myriad of other capabilities. In advertising, algorithmic intelligence will deliver just the right message to just the right consumers. Join Gerry Murray and Karsten Weide to discuss new approaches to managing and analyzing the data underlying these new revolutionary capabilities.

Table 3: Blockchain — Financial Services, *Bill Fearnley, Research Director, Compliance, Fraud and Risk Analytics, IDC Financial Insights*

IDC's "four forces" are helping fuel demand for distributed ledger technology (DLT) solutions in financial services in areas such as risk and compliance (e.g., AML, KYC, and trade finance). This roundtable will discuss how the four forces are driving innovations in blockchain, digital ledger technology (TLC), and smart contracts solutions to help financial firms improve compliance, better manage risk, and improve post-trade settlement and liquidity.

Table 6: Cloud and Enterprise Infrastructure Technology Update, *Abhi Dugar, Research Director, Cloud and Enterprise Infrastructure Enabling Technologies and IoT Security*

Cloud and enterprise infrastructure technologies across compute, storage, networking, and security are evolving and adapting to support network virtualization, hyperconvergence, and SDN and NFV adoption. This session will focus on the vendors, technologies, and markets for enabling technologies in the infrastructure of cloud, web, and telecom service providers as well as large enterprises.

Table 8: Cognitive/AI Systems — Cognitive/AI Adoption in Enterprises, *Dave Schubmehl, Research Director, Cognitive/AI Systems and Content Analytics*

Applications based on artificial intelligence, deep learning, and cognitive computing are enhancing and transforming business processes, augmenting knowledge worker skills, and producing recommendations and predictions. Join us to discuss the trends in cognitive/AI systems and discuss the adoption characteristics of enterprises that are using these technologies to create competitive advantage.

Table 9: Computing Platforms — The Next Frontier, *Ashish Nadkarni, Program Director, Computing Platforms*

We will discuss trends in "heterogeneous computing" systems and their influence on the Computing Platforms research at IDC. We will examine technologies, packaging/delivery models (like containers and unikernels), and go-to-market options. We will also discuss the impact of polyglot computing on cloud and next-generation application development. We will also examine workloads that can make use of these newer technologies.

Table 10: Content Marketing — Opening the Door to User-Generated and AI Content, *Kathleen Schaub, Research Vice President, CMO Advisory and Customer Experience Practice*

Content marketing — it's not just for marketers anymore. While content experts will determine the most strategic aspects of a company's commercial communication, CMOs must prepare to leverage content from a wide range of sources. We'll discuss what companies need to do to get ready for and leverage the opportunity of user-generated content (UGC), content produced by artificial intelligence, and content from other sources.

Table 11: Converged Infrastructure — Meeting the Demands of an Evolving Enterprise, *Eric Sheppard, Research Director, Enterprise Storage and Converged Infrastructure*

The converged infrastructure market is undergoing considerable changes, driven by a dynamic competitive environment and rapid technology advancements. Users are benefiting from new architectures, advanced management features, increased automation, and maturity of SDS capabilities. Join IDC to learn how these, and other, market dynamics are pushing converged infrastructure to the forefront of datacenter infrastructure decisions.

Table 12: CX Engagement Change — Embracing Mobility, Social Media, and IoT Pragmatically, *Leslie Hand, Vice President, IDC Retail Insights*

Business success requires exponential shifts in engagement, but technology investments in mobile, social, and IoT must be pragmatic first, innovative second. Whether the focus is on autonomic decision or M2M processes that improve quality, productivity, and output or visibility that enables a better experience and an improved ability to act on it, smarter decision processes and real-time interactions will drive desired behaviors and metrics.

Table 13: DevOps — Market Priorities and Opportunities, *Mary Johnston Turner, Research Vice President, Enterprise Systems Management Software*

DevOps-driven digital transformation is creating many new market opportunities for software, SaaS, and cloud infrastructure services companies. We'll discuss IDC's ongoing research on the adoption and impact of DevOps across development, infrastructure, and cloud services markets.

Table 14: Digital Transformation — Organizing the Organization for Success, *Shawn Fitzgerald, Research Director, Insights Worldwide Digital Transformation Strategies*

This lunch roundtable will cover and discuss change management strategies for success. Included in the session are methods, tools, and best practices for getting the business (organizations and personnel) prepared for enterprisewide change required when implementing winning DX strategies and enabling better DX transformational outcomes.

Table 15: Digital Transformation with Enterprise-Class Servers, *Peter Rutten, Research Manager, Server Solutions*

Don't migrate, integrate. Today's enterprise-class servers — mainframe, Unix, and scale-up x86 — are built for digital transformation. They play well with distributed and within larger ecosystems. What's more, they allow the business to leverage the core data and functionalities they harbor for new revenue-generating activities. In this roundtable, we'll discuss trends IDC sees for enterprise-class systems as well your experiences on the subject.

Table 16: Digital Workspaces — Assessing DaaS and Device Management Strategies, *Robert Young, Research Director, IT Service Management and Client Virtualization Software*

Recent IDC studies have found disparate hardware platforms, OSs, and applications are prompting organizations to assess their end-user computing strategies to include DaaS. Thus IT will seek capabilities to unify the management of physical, virtual, and cloud-hosted desktops and applications. We will discuss best practices for embracing a single multidevice management approach to balance user empowerment with IT governance and control.

Table 17: Driving Agile DevOps Quality — Cultural and Automation Challenges, *Melinda-Carol Ballou, Research Director, Agile ALM, Quality and Portfolio Strategies*

Continuous testing is a bottleneck for DevOps, and poor quality is a barrier to digital transformation. What strategies are enterprises adopting to address these challenges? Quality must also encompass code analytics, security, and support for modern development with APIs, microservices, and platforms beyond mobile to include IoT. Analytics plays a key role to drive business velocity and IT metrics. Join this roundtable to discuss process and quality automation strategies.

Table 18: Emerging Market Spotlight on Latin America — Has the Corner Been Turned? *Jay Gumbiner, Vice President, Latin America*

The economic slowdown in Latin America over the past few years is no secret. Has the region finally turned the corner? Are brighter times ahead? How will Mexico be impacted by a Trump administration? Is Argentina prepared for new freer-trade policies? Join analysts to discuss which geographies and technologies will outpace their peers in the coming years and the strategies vendors are putting in place to thrive in this emerging market.

Table 19: Enterprise Adoption of Public Cloud IaaS — Use Cases and Challenges, *Deepak Mohan, Research Director, Public Cloud Infrastructure as a Service*

Public cloud IaaS usage has expanded beyond start-ups, and large enterprises are now important drivers of usage growth. This session will discuss use cases driving enterprise adoption, and enterprise-oriented services emerging in the market. It will also cover challenges to workload migration to public cloud and consider how they will change in coming years.

Table 20: Enterprise Storage: AFAs Expanding Beyond Just Primary Storage Workloads, *Eric Burgener, Research Director, Storage*

AFAs first shipped in 2011 and by the end of 2016 have become a mainstream enterprise computing platform generating \$4.6 billion in revenue. In early 2016, we saw a new class of "big data flash" AFAs emerge targeted at less latency-sensitive workload types. IDC will be ramping research efforts in this area in 2017, and this roundtable discussion will offer a preview of that work.

Table 22: Future Services for the DX Economy, *Michael Versace, Research Director, Digital Strategy Consulting*

This lunch roundtable will discuss trends in the digital consulting and agency services market and the impact digital transformation will have on future services. Industry and market drivers will be discussed, along with buyer perspectives and priorities across top-consuming sectors/industries. The lunch will wrap up with important guidance for the enterprise consumer of future services and participants in its service provider ecosystem.

Table 25: IoT Analytics and Information Management — Technology and Adoption Trends, *Maureen Fleming, Program Vice President, Process, Integration and IoT Middle Tier Research*

This roundtable will delve into the state of IoT from the lens of opportunities and challenges in the IoT analytics and information management (AIM) tier. This will be a discussion that includes the perspective of adoption as well as evolving technologies.

Table 28: Leveraging Distributor Marketplaces — Why They Are Important, *Pam Miller, Research Director, Partnering Research*

Nobody can match the efficiency of distributors at credit checks, collections, and logistics, nor their scale or access to a wide range of partner types. Now with distributors' rapidly evolving marketplaces, the benefits of working with distributors is dramatically expanding. Learn how distributors are empowering their partners to better guide end customers in their digital transformation from cloud enablement to IoT and advanced analytics.

Table 29: Loyalty and Advocacy — How to Engender Loyalty in the Face of Changing Customer Preferences, *Mary Wardley, Program Vice President, Loyalty and Customer Care*

IDC predicts that, by 2019, 65% of Facebook users will no longer be considered "active" users as they abandon the platform in favor of experience-based media. Facebook usage has swelled to over 1 billion active users since its inception in 2004. However, the more digital-savvy Facebook users are experimenting with other experience-based media like Snapchat and other applications in the context of messaging apps, like WhatsApp. We will discuss what brands can do to maintain loyalty among changing customer behaviors.

Table 33: Sales Enablement: Helping Sellers Overcome Critical Knowledge Gaps, *Thomas Barrieau, Director, Sales Enablement Practice*

IT buyers are difficult to connect with. They self-educate and often delay engagement with salespeople, shrinking their window to learn about the buyer. They're more diverse, often coming from the lines of business and seeking a different kind of dialogue. How can sellers overcome these critical knowledge gaps? At this roundtable, we'll discuss a new type of sales education that can help salespeople better connect with buyers and earn their trust.

Table 34: Security Products Spending Beyond the Firewall, *Rob Ayoub, Research Director, Security Products, and Frank Dickson, Research Director, Security Products*

Over the past several years, organizations have been opening up security budgets and replacing aging firewalls with advanced platforms. Now that most of those replacements are complete, the question is where will organizations spend next — STAP, DDoS, or other emerging technologies? Join Rob Ayoub and Frank Dickson as they discuss what's next for security spending in the enterprise.

Table 36: Software- Defined Compute: Virtualization, Containers, and IaaS System Software, Gary Chen, Research Manager, Software-Defined Compute

Server virtualization has established itself as the standard compute model, but containers such as Docker are becoming popular. Will containers replace or augment VMs, and how will containers impact the rest of the cloud stack? What will be the impact of container orchestration platforms such as Kubernetes, Mesos, and Swarm? We'll also discuss the usage of hypervisors and containers underneath cloud system software platforms such as OpenStack, vCloud, and Azure Stack, and their adoption and challenges within the industry.

Table 37: Transitioning Enterprise Production Databases to the Cloud, Carl Olofson, Research Vice President, Application Development and Deployment

We will discuss the processes and challenges involved in transitioning production databases to the cloud, including which cloud service to use, whether to change DBMS vendors in the process, and issues regarding the process of moving to the cloud. Questions for discussion include "How important is collocation with applications, and should analytic databases be on the same cloud platform as operational?"

12:35 pm – 1:15 pm Lunch and Learns

Pick up a box lunch before your session.

Enabling Agility with Smarter Datacenters, Jennifer Cooke, Research Director, Datacenter Trends and Strategies

Digital transformation is based upon the ability to make data-driven decisions to drive innovation. Smarter datacenter technologies (including dynamic asset management, real-time power and environmental monitoring, and advanced and predictive analytics capabilities) are essential in making these data-driven decisions to improve agility in datacenter facility resources. Many enterprises are adopting SDI to increase operational efficiency and improve agility — but to truly support innovation and enable IT to move at the speed of business requires making data-driven decisions about the physical datacenter facilities that support the IT and network infrastructure. This session will explore smarter datacenter technologies that are essential for an agile and IT service-driven model.

Intelligent Applications: The Interconnected Futures of Applications and Analytics, Henry Morris, IDC Fellow, Big Data, Analytics, and Cognitive Software Research

The futures of applications and analytics are fundamentally related. Advances in analytics are enabling a new generation of applications in support of redefined business roles in today's digital world. These intelligent applications, incorporating machine learning and natural language processing and built on hybrid analytical-transactional databases, can understand a user's business process context to enable personalized, just-in-time delivery of information with guidance to managers and front-line workers via an engaging user experience. A wider range of tasks and decisions will be fully or partially automated, driving efficiency gains and more consistent business performance. But the move to algorithmic decision making within business operations can also lead to unintended consequences, increasing risk to the enterprise and its stakeholders. Hence, the adoption of intelligent applications also will drive new requirements for analytical services to audit algorithms, applying predictive analytics to anticipate their impact, evaluate the risk, and recommend controls and governance measures.

PaaS Is Passé — Cloud-Native, Dev Services Change the Landscape, Scott Ottaway, Research Director, DevOps

Increased customer expectations require enterprises to deliver innovative applications leveraging a wide array of cloud services much faster than ever before. Improved platform functionality accelerates productivity that helps address the shortage of skilled application developers by abstracting and automating the underlying infrastructure. The cloud-native approach is changing how applications are designed, developed, implemented, and managed both on-premises and in the public cloud. At the same time, developer services are having a major impact on the ability to deliver new functionality like machine learning and the Internet of Things through applications. In this session, you will learn how customers are leveraging new platform capabilities in meeting business needs to execute digital transformation initiatives.

Matching Price with Value: The New Software Business Model, Amy Konary, Program Vice President, SaaS, Cloud, and Business Models

The era of digital transformation has given rise to a number of established businesses and start-ups that combine digital technologies and unconventional business models to disrupt competitors and even entire industries. The convergence of cloud, mobile, social, cognitive, big data/analytics, and IoT is providing a platform for a variety of value-based models, while factors such as a desire for more efficient and flexible ways of buying products and services, global competition, and slow-growing economies and markets are providing the business motivation. However, a successful shift from traditional product-centric to value-centric models requires technologies to help cultivate, manage, and measure customer relationships, as well as process and organizational changes to orient value around successful outcomes. This session will help business and IT leaders understand value-based business models and how they are being used in different industries and evaluate the potential for disruption. This session will also identify key principles and critical components of a value-based monetization program to help generate greater customer intimacy, improve product or service quality, and drive greater operating efficiency.

12:50 pm – 1:20 pm Analyst One-to-One Meetings

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1:30 pm – 2:10 pm Track Sessions

Track 1: How "as a Service" Gets Built 2.0, Robert Mahowald, Group Vice President, Enterprise Applications and SaaS, Industry Cloud, and Digital Business Models

In 2017, 100% of net-new 3rd Platform services coming to market are being built for as-a-service delivery. But what are the platforms that will provide the foundational technology, scale, ecosystems, and marketplaces for building, selling, and fulfilling business software? Both early stage start-ups and executives at the largest software companies are trying to figure out where to build and run and which platform providers to make their bets on. Large center-of-gravity tech players and industry cloud providers are trying to figure out how they can play a central (and profitable) role in being a nexus between customers and partners. Microsoft, Google, Amazon, Oracle, and IBM all have big bets on providing the tooling and business support systems for the next big "as a service" businesses to get built, but do they have what it takes? As-a-service start-ups have a variety of choices, including business enablement services, technical operations, and marketplaces, required to bring their offerings to market. Using vendor interviews and a variety of other data, Robert Mahowald will walk the audience through the landscape for SaaS enablement and marketplaces.

Track 2: IoT Strategies Change Everyone's Business Models, Vernon Turner, Senior Vice President of Enterprise Systems and IDC Fellow for the Internet of Things

The Internet of Things is set to have a profound effect on where and how businesses create value. Instead of consumers being buyers, now machines become buyers. Instead of businesses creating value, your customers create value. What will IoT do to your brand, your products, your customers, and the way you do business? Find out what will be the absolute requirements to succeed in the IoT economy in this session.

Track 3: Blockchain — Seizing the Opportunities in Distributed Ledgers and Smart Contracts, Bill Fearnley, Research Director, Compliance, Fraud and Risk Analytics, IDC Financial Insights

Many organizations in a variety of industries have begun moving past the investigation stage to investing in a variety of blockchain and smart contracts-based initiatives. We will discuss how four forces — industry participants, solution providers, regulators, and consortiums — are combining to accelerate innovations in distributed ledger technology (DLT) and smart contracts. Blockchain has the power to change how goods and services are delivered, change the revenue and expense equation of market participants and intermediaries, and drive changes in market share, profitability, and competition over time. Smart contracts are gaining momentum as a way to help automate contract execution, enabling direct connections that can improve transaction processing and shorten post-transaction settlement time, reducing risk and improving liquidity for market participants. We will discuss near-term and longer-term trends with advice on how to take advantage of opportunities and prepare for the challenges firms across multiple industries will be facing in blockchain and smart contracts in 2017 and beyond.

Track 4: Beyond Flash — Accelerating Performance in the Datacenter, *Eric Burgener, Research Director, Storage*

Since the introduction of all-flash arrays back in 2011, we have seen flash technologies expand to address a broad range of workloads, not just tier 0 workloads in the datacenter. Specialized all-flash platforms that IDC refers to as "big data flash" are bringing the benefits of flash to big data analytics and less latency-sensitive workloads and will likely play a role in driving greater use of cognitive services. We are also seeing the introduction of flash with NVMe targeted at new "rack-scale flash" workloads in the area of real-time big data analytics with workloads that require lower latencies and must handle larger data sets than primary AFAs can handle. This session will review developments in the big data flash and rack-scale flash areas, discuss early customer experiences, and provide insights on how the move beyond flash will affect cloud-based infrastructures and application designs.

Track 5: Is Cognitive/AI Technology Adoption Real? *Dave Schubmehl, Research Director, Cognitive/AI Systems and Content Analytics*

IDC predicts that, by 2018, 75% of enterprise and ISV development will include cognitive/artificial intelligence (AI) or machine learning functionality in at least one application, including all business analytics tools. Announcements about new cognitive/AI solutions have inundated the IT airways in the past couple of years. Some vendors have made bold pre-announcements while others have already made cognitive/AI solutions generally available. The venture funding community has continued to pour money into machine learning vendors, and large IT and industry enterprises continue to acquire technology vendors in this market. These trends suggest a growing supply of cognitive/AI technology, but what are today's demand trends that are leading end users to cognitive/AI solutions? What are the risks and roadblocks to adoption of these transformative solutions? This session will highlight the current investment patterns in cognitive/AI solutions. It will highlight use cases and case studies in the adoption of this technology as distinct platforms, embedded functionality in applications, and analytics and information management software and in the form of digital assistants for enterprise knowledge workers.

Track 6: Opportunity in the Digital Economy, *Bob Parker, Group Vice President and General Manager of IDC Retail, Energy, and Manufacturing Insights*

IDC has identified nearly \$20 trillion of economic opportunity in the digital economy. In this session, Bob Parker will share this analysis and how it impacts various industry segments. The presentation will also look at how enterprises are approaching the governance of the transformation and how they are investing in technology to support it.

Track 7: 5G — Five Reasons It Drives the Collision of Mobility and IoT, *Carrie MacGillivray, Vice President, Mobility and Internet of Things*

The mobile and IoT markets have operated in seemingly concurrent paths for the past several years. With the advent of 5G, there will increasingly be overlap of connecting people and things on these networks, which will allow for faster speeds, lower latency, and better battery life. 5G will begin its path to commercialization in 2017 with fully functional 5G networks coming online in 2020. Behind the gathering hype, 5G's full potential will unlock economic growth. Speed and agility are the defining characteristics of 5G, and consumers, organizations, and "things" will benefit from this next-generation network capability. In this session, Carrie MacGillivray will provide her perspective on the top 5 reasons 5G is going to help perpetuate the collision course between mobility and IoT hardware, software, and services. Having observed the mobility and IoT markets for the past several years, MacGillivray has a unique perspective on how these two transformational markets will coalesce post-2020.

Track 8: What Do They Want? Getting Ready to Win the Next Generation of IT Buyers, *Kathleen Schaub, Research Vice President, CMO Advisory and Customer Experience Practice*

What does the buyer of today (and tomorrow) really expect from marketing? Since the early days of the digital transformation, tech marketers have been slammed with the implications of increasing buyer power — rising expectations, avoidance of sales involvement, demands for hyper-personalization, and skyrocketing use of ad blockers. Kathleen Schaub will share data from IDC's 2016 *IT Buyer Experience* study, highlighting how millennial buyers are different from other buyers, how buying dynamics are changing, and at which marketing competencies customers want marketing organizations to excel.

2:20 pm – 3:00 pm Track Sessions

Track 1: Intelligent ERP — The Front End of the Future, Mickey North Rizza, Program Vice President *Enterprise Applications and Digital Commerce*

IDC recognizes that, by 2018, 35% of line-of-business leaders will demand intelligent enterprise applications to improve business processes and resource utilization and, in just a few years beyond that, 30% of Global 1000 CEOs will be strategically planning resource shifts from human to intelligent systems, across multiple functions and processes. In this session, Mickey North Rizza will share this analysis and how it impacts the line of business, IT, technology, business processes, and employees. She will also share the impact of the 3rd Platform on enterprise applications including the changing landscape and what it means to the businesses that depend upon enterprise technologies.

Track 2: Promise of the IoT — The Professional Services Opportunity, Rebecca Segal, Vice President, Global *Services Markets and Trends*

Systems integrators (SIs) and consulting firms are playing a critical role in delivering on the promise of the IoT. IDC research has shown that most companies will choose to engage an outside service firm for help in strategizing and/or executing their IoT initiatives. This session will examine the role of SIs and consulting firms as well as the key SI partnerships built by IoT leaders such as GE for its Predix platform.

Track 3: Managing Identity in a Digitally Transformed World, Frank Dickson, Research Director, Security *Products*

Digital transformation demands business agility and precision delivery. As such, enterprises are turning to rapidly deployable and infinitely scalable cloud resources or highly tuned connected devices capable of performing specialized tasks. These cloud resources, devices, and their business stakeholders reside in a hyperconnected ecosystem where sensitive data and crown jewels flow freely. With that as the backdrop, both user and device identity become paramount to protecting data, devices, and individuals.

Track 4: DX and Its Impact to the Datacenter — Are You Ready? Laura Dubois, Group Vice President, *Enterprise Storage, Servers and Infrastructure Software*

Digital transformation is influencing datacenter operations, architectures, and staffing decisions. DX objectives of information, operational, and relationship mastery have given rise to the adoption of next-generation applications, cloud and OpenStack deployments, flash acceleration, and big data analytics strategies. But DX is also driving organizational and process transformation including DevOps methodologies and the rise of the infrastructure developer. This session will review the developments in datacenter technology adoption, operational processes, and organizational development and highlight customer case studies born out of recent DX initiatives.

Track 5: Navigating the New Hybrid Data Management Architecture, Carl Olofson, Research Vice President, *Application Development and Deployment*, and Ashish Nadkarni, Program Director, *Computing Platforms*

IDC predicts that, by 2020, the dominant analytics and information management architecture will include purpose-built, optimized solutions, one-third of which will be based on the federation of nonrelational and relational data. What we mean by hybrid can no longer be constrained to on- and off-premises deployment of storage, servers, and information management software. It must also be defined by the specialization and diversification of the information management technology stack that is occurring based on a broad range of information management workloads. The reality is that it is no longer practical or desirable to have all your data in one database. This change is affecting technology purchasing decisions by end users but also pricing and packaging decisions by vendors. This session will highlight IDC research showing adoption of various information management technologies, as well as the evolving competitive landscape of vendors providing both comprehensive platforms and niche solutions.

Track 6: The Digital Mission in Healthcare — Value-Based Care, Lynne Dunbrack, Research Vice President, *IDC Health Insights*

Healthcare accounts for nearly 12% of global GDP and over 17% in the United States. This industry represents one of the most significant opportunities for digital transformation and economic value creation. In her presentation, Lynne Dunbrack will discuss the digital mission in healthcare and how organizations are setting specific strategic priorities and funding investment programs to achieve those priorities. She will also look at the impact of innovation accelerators, especially IoT and cognitive, in delivering on the digital mission.

Track 7: End-User Computing — The Second Wave, *Linn Huang, Research Director, Devices and Displays*

The first wave of enterprise mobility has already had a profound impact on IT device strategies. The rise of smartphones and tablets brought about challenges for IT managers in how to govern, secure, and manage these devices, and many are still wrestling with how to build useful mobile applications. While enterprise mobility is still a nascent strategy for many enterprises, the second wave of enterprise mobility is already upon us. IDC expects several key trends to dominate this second wave. These trends include hyperconvergence across device boundaries, further acceleration of cloud and virtualized computing, and the growth of device provisioning through as-a-service models. In this session, Linn Huang explores the challenges and opportunities facing companies in this mobile-first environment. Huang will examine the devices, use cases, and deployment strategies that will drive the next generation of businesses, and he'll provide actionable advice to the tech companies that hope to serve them.

Track 8: From MarTech to CX Tech — A Road Map for the Next Decade of Innovation, *Gerry Murray, Research Director, Marketing and Sales Technology*

The biggest question today for marketing technology is not best of breed versus platforms but how to orchestrate all customer-related applications. In this talk, IDC will introduce the customer experience operating system as a business requirement for digital transformation and competitive advantage and provide examples of what leading vendors and practitioners are doing.

3:10 pm – 3:50 pm Track Sessions

Track 1: DevOps — A Disruption and Opportunity Assessment, *Al Gillen, Group Vice President, Software Development and Open Source*

This session considers how DevOps broadly empowers but also disrupts existing environments in multiple dimensions, including how the build process for application must evolve, how DevOps impacts infrastructure choices and selections, and why DevOps is about people and process as much, if not more, than technology itself. How does an organization successfully embrace DevOps?

Track 2: Accelerating IoT Adoption — Innovative Partnerships with State and Local Government, *Ruthbea Clarke, Research Director, Smart Cities Strategies, IDC Government Insights*

Many governments around the world are facing an uncertain economic future with low oil prices, mass immigration, Brexit, and turmoil from recent U.S. elections leading to political instability. Cities and central governments see the potential value and impact of adopting a Smart City vision, but many lack a clear funding path especially in light of this uncertainty. This presentation will discuss new methods of data and revenue sharing and new partnerships that could help government organizations invest in Smart City initiatives more quickly.

Track 3: Beyond the Firewall — A Buyer's Guide to Cloud Security, *Rob Ayoub, Research Director, Security Products*

Enterprises have long since moved beyond the firewall. Specialized workloads, data repositories, and niche business utilities already live in the cloud. In this environment, buyers are presented with three ways to engage cloud security: as part of a cloud-delivered hosted platform or infrastructure product, as part of a cloud-based hosted security software product, or as part of a managed cloud-hosted service. This presentation will follow the IT buyer as security is shifted to the forefront of the decision-making process and highlight the ways security can be engaged and how those methods can affect IT buying decisions.

Track 4: Cloud 2.0 — New Services, Challenges, and Opportunities, *Rick Villars, Vice President, Datacenter and Cloud*

Within the next few years, organizations' digital transformation efforts will accelerate the transition to a cloud-based IT platform (cloud 2.0) for all on-premise and off-premise workloads. In this session, Rick Villars will share insights from IDC's global research teams on key milestones in cloud adoption, including the effect of the Internet of Things, cognitive, augmented reality, and other innovation accelerators on cloud service providers' expansion strategies, service offerings, and competitive positioning. He will also provide insights and guidance on how IT product and services providers can capitalize on the most important new development in the cloud infrastructure market — organizations' need to optimize management and security across their multicloud portfolios.

Track 5: Monetizing Your Data — Hidden Opportunities of Offering Data as a Service, Dan Vesset, Group Vice President, Analytics and Information Management

IDC predicts that, by the end of 2017, revenue growth from information-based products will double the rest of the product/service portfolio for one-third of Global 2000 companies. What opportunities and challenges does this prediction present? Does your organization want to become a data-as-a-service provider or a data-as-a-service platform? Do you want to sell raw data or value-added content? Should you price data products on their own or bundled with applications or services? IDC analysts are regularly responding to these types of questions from IT and industry enterprises. One of the top areas of interest is the application of external data delivered via data as a service in support of improving existing and developing new customer experience initiatives. This session will present IDC's latest research into the data providers, brokers, and marketplaces market. By highlighting issues with data-as-a-service business and pricing models, partnerships, intellectual property management, and regulation, this session will help guide your organization's efforts to capitalize on this vast market opportunity.

Track 6: A Day in the Life of the Digital Consumer, Greg Ireland, Research Director, Multiscreen Video

The consumer is ultimately the biggest beneficiary of the social impact of digital transformation. In this presentation, Greg Ireland will look at how consumers — at home, in transit, and at work — will enjoy new experiences in managing their wellness, relationships, and entertainment. The presentation will look at how technology concepts like personal clouds, intelligent assistants, and immersive connectivity will change how companies serving the consumer will have to change their approaches to ensure unique, personalized digital experiences.

Track 7: Connected Car — Who's in the Driver's Seat for the Next Wave of Mobility? Brian Haven, Senior Research Analyst, United States Mobile Consumer Services, and Heather Ashton, Research Manager, IDC Manufacturing Insights

New versions of the mobility construct are transforming the way the automobile is connected, utilized, and monetized. The connected car ecosystem is in a state of rapid flux as participants respond to the changing opportunities, emerging business models, and disruptive new entrants. The connected car landscape will look dramatically different in 2025. Who will win? Who stands to gain the most? What are the elements of success? In this session, Brian Haven and Heather Ashton will look at three parties in the ecosystem — the auto manufacturers, network operators, and the consumer — exploring the contribution of each to ecosystem development and setting expectations about how this market will evolve in the coming years.

Track 8: Loyalty and Advocacy — The Critical Collaboration of Marketing and Service, Mary Wardley, Program Vice President, Loyalty and Customer Care

The terms "loyalty" and "advocacy" can carry very different meanings depending on the role of the customer-facing department. Loyalty within marketing means brand affinity, while within service it means satisfaction and long-term retention. As organizations seek to differentiate, creating a comprehensive go-to-market handling strategy is imperative. We'll discuss how marketing and service groups can and should work together in a manner that can build loyalty and advocacy among customers without being in conflict.

4:00 pm – 5:00 pm Featured Keynote



The Second Machine Age, *Andrew McAfee, MIT scientist and cofounder of the MIT Initiative on the Digital Economy*

We are living in a time of brilliant technologies: cars that drive themselves; *Jeopardy!*-champion supercomputers; cheap, flexible, and useful robots; algorithms that make better decisions than humans; and countless others. They are bringing us into a second machine age, the greatest era of transformation since the Industrial Revolution.

In his talk, Dr. Andrew McAfee, coauthor of the *New York Times* bestseller *The Second Machine Age*, will discuss both the great promise and thorny challenges — for the IT industry and its customers — of the world we're creating as we adopt and deploy digital technologies that are the stuff of science fiction.