

# Agenda

## Disruptions 2005

Technology, Media & Telecommunications in 2010:  
Key Imperatives for Industry Leaders  
September 15 – 16 at San Francisco's Palace Hotel



Why the title “Disruptions?” Today's global economy means accelerating change is the norm and leaders must become ever more sophisticated in recognizing, assessing and managing disruptions:

- The emergence of India and China as global economic forces
- The constantly changing regulatory environment
- The impact of technology on business model innovation
- The emergence of new competition from unexpected sources
- The commoditization of many technologies and products
- The rise of digital piracy and other attacks on intellectual property
- The challenge (and reward) in differentiating products and services in a networked economy

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Speakers, speaker placement, sessions and times subject to change.

## Pre-Event Networking – Wednesday, September 14, 2005

<b>Registration</b>	<b>9:00 AM – onward</b>
<b>Golf</b>	<b>2:00 PM – 6:30</b>
<b>Dinner (Informal)</b>	<b>7:30 PM – 9:30</b>

## Day 1 – Thursday, September 15, 2005

<b>Registration &amp; Breakfast</b>	<b>7:30 – 8:30</b>
<b>Welcome Executives and Introduction of Guest Speaker</b>	<b>8:45 – 9:00</b>
<b>Opening Remarks by Guest Speaker</b>	<b>9:00 – 9:30</b>
<b><i>Executive Roundtable</i></b> <b>The Critical Imperatives Facing Executives of Technology, Media and Telecommunications Companies</b>	<b>9:30 – 10:45</b>
Discussion of issues around pricing power, supply chain, innovation, managing in an environment of accelerating change, regulation, the blurring of competitive boundaries, digital piracy, workforce development (where will the future scientists, engineers and technicians come from? How do education systems worldwide need to change?). What are executives doing about employee motivation, career development and spurring creativity in an increasingly global workplace? The Executives will be asked to consider the Critical Imperatives, and give their insights.	
<b>Break</b>	<b>10:45 – 11:15</b>
<b>Leading Executives Weigh in on Emerging Issues</b>	<b>11:15 – 12:30</b>
While executives are concerned with immediate issues, what nascent or emerging threats and opportunities do they perceive? What are TMT executives, government officials, regulators and the media missing about technological or business trends? What are leading business theorists thinking about? How will accelerating business cycles impact the T, M and T markets, and	

which emerging issues will become tomorrow's front-page news?

**Lunch**

**12:30 – 2:00**

**Thriving in a Networked World**

**2:15 – 3:30**

Differentiating products and services in a networked economy, where interoperability and adherence to standards is required, is a daunting challenge. At the same time, an increasingly networked world still demands localization and specialization of entertainment and information. And how will increasingly cheap computational ability, courtesy of Moore's law, and an explosion of new digital storage and viewing platforms like MP3 players, DVRs, and handheld devices, drive new products, services and entertainment through the networked economy? How does "realtime everything" change our (working) lives?

**Digital Property and Digital Piracy --  
We Ain't Seen Nothing Yet**

**3:30 – 4:30**

Music was the first target, and movies, games and books likely will be the next victims of piracy. Is the remedy technological, legal, societal, new pricing models, or all of the above? What is the future likely to hold, and what sort of new business models will arise to help content creators control their inventions while also satisfying customers? Are content creators and distributors aware of the rise of user-generated content, and the attendant diminishment of demand for company-produced content?

**Break**

**4:30 – 5:00**

**Innovation – You Know it When You See It**

**5:00 – 6:00**

But, defining innovation (and repeating it) can be exceedingly difficult. How do some companies endlessly innovate successfully, while others never crack the code? How can you tell if your innovation is profitable, or a black hole into which you're throwing profits?

**Closing Comments**

**6:00 – 6:15**

**Dinner (Formal)**

**7:30 -- 11:00**

Location: Carnelian Restaurant

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## Day 2 – Friday, September 16, 2005

**Breakfast and Welcome**

**7:30 AM – 8:30**

**China and India Ascendant: Their Impact on Technology, Media and Telecommunications**

**8:30 – 9:45**

How will two of the world's most populous nations change the global economy, innovation and technology? China and India are often viewed only as low-cost manufacturers – what will competitors, partners and regulators need to know as these two Asian powers inevitably move up the value chain, and begin to develop new technologies, become a world-class R&D center, and establish robust capital markets? What are leading Chinese and Indian companies doing to improve their chances of success?

**Break**

**9:45 – 10:15**

**Winds of Change:  
Four Technologies that Will Change the World:  
Industry “Deep-Dives”**

**10:15 – 11:30**

Some new technologies will only create ripples in the marketplace, while others will redefine markets and create new products and industries. Leading futurists, executives and researchers provide a clear view of four technologies that promise to change the world: Nanotechnology, ubiquitous computing, RFID and Fiber-to-the-Home.

Participants can select one “deep-dive” session that will look at a disruptive technology and its business, societal and global impacts

***Nanotechnology***

*Recently, nanotech has shown up in Hollywood films, best-selling novels, new legislation, and new products. What is nanotechnology, and why are large and small companies alike devoting significant resources to developing new innovations around atom-level innovations? What impact will nanotech breakthroughs have on new product development, pricing power, the life sciences, and global competitiveness? Who will be the winners, leveraging nanotech to their advantage, and which companies and industries risk letting nanotech disrupt them? Which countries lead the charge in commercializing nanotech innovations?*

***Ubiquitous Computing***

*The relentless miniaturization of ever more powerful microprocessors, the development of new wireless technologies, the steep decline in storage costs, and the prevalence of the Internet has set the stage for a sea change in computing. Ubiquitous computing is getting close enough to begin conjecturing on how it will impact present players, and what sort of new products will be enabled and spurred by it. Societal, legal and business disruptions created by a robust and always-on computerized environment will also be addressed.*

**Radio Frequency Identification (RFID)**

*Within the past decade, we have perfected supply chain management tools that permit us to track the things that we make and sell across an enterprise or an entire industry. What has been missing, however, is the infrastructure and tools for tracking individual items as they move through the chain of commerce. Bar codes and their ilk have provided a partial solution, but have their limitations. Imagine how such product-specific tracking could simplify sales forecasting and inventory management, and enable a deeper level of understanding of how and where people use products. Radio Frequency Identification (“RFID”) tags and the devices that can read them are the technologies that will permit this sort of tracking. Combined with the ubiquity of the Internet and the global positioning satellite systems, distributed readers could track items, people, vehicles, and raw products, simplifying many daily activities and enabling whole new industries and services. Who will benefit most from these innovations, what are the non-obvious threats and opportunities provided by RFID, and how quickly will these disruptions arise?*

**Fiber-to-the-Home (FTTH):**

*When will FTTH reach high levels of penetration? What will the likely impacts be on other sectors such as infrastructure and application development? What will FTTH's impact be on conventional television broadcasters, advertising models, and software sales/usage? What sort of regulatory and competitive issues will need to be resolved? What will be the likely responses of incumbents like satellite and cable providers? How will education and employment change in a society where virtually unlimited bandwidth is widely deployed? What are the technologies or trends that may limit FTTH's penetration?*

**Closing Comments**

**11:30 – 12:00**

**Strategy and Success:**

**12:00 – 2:00**

**A Chess Tournament with Garry Kasparov**

Join executives from other leading companies as you try to beat the Master in a one-to-many chess game. Mr. Kasparov will play against a group of 20 executives chosen from the audience, and will show how intuition and strategy can prevail even when pitted against an apparently superior opponent.

**or**

**A World of Possibilities:**

**12:00 – 1:15**

**Scenario Planning for Executives**

In an increasingly fast-moving environment, the ability to act intelligently and decisively can be the only thing that stands between oblivion and success. With tools like scenario planning, knowing what to do when the future happens becomes possible.