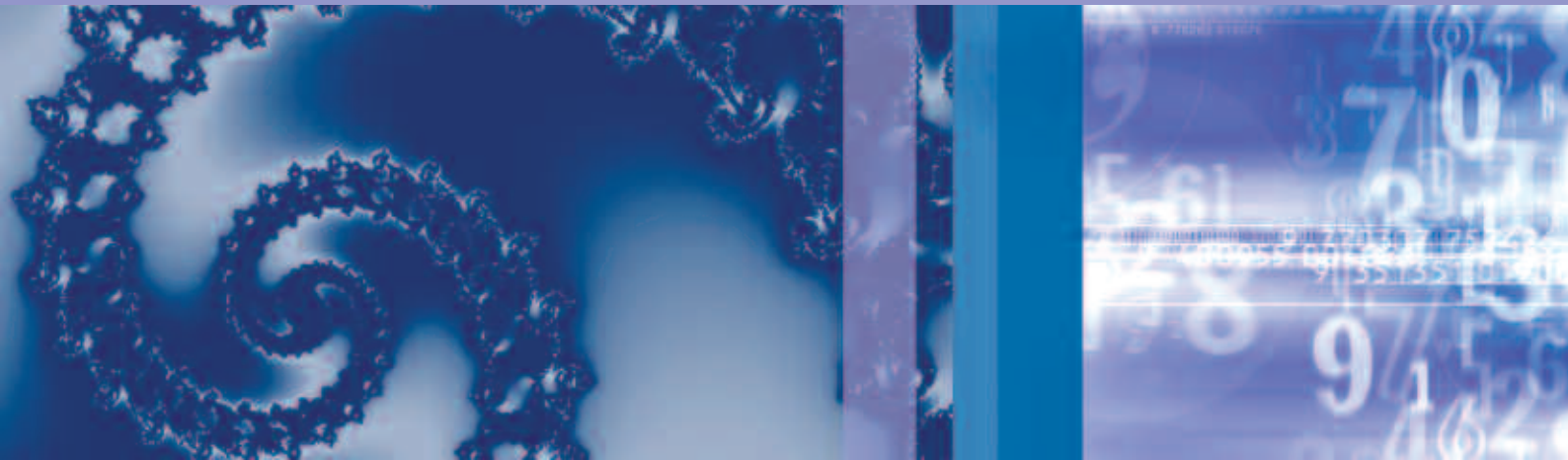


# Gartner

## Financial Services Technology Summit 2007

24-25 SEPTEMBER 2007, LONDON HILTON METROPOLE  
[europe.gartner.com/fst](http://europe.gartner.com/fst)



### NAVIGATING A CLIENT DRIVEN WORLD

#### SUMMIT CO-CHAIRS



**Peter Redshaw**  
Research Director,  
Gartner



**Vincent Oliva**  
Managing VP,  
Gartner

#### KEYNOTE SPEAKERS



**Frank Schlier**  
Gartner



**David Furlonger**  
Gartner



**Gerald Ashley**  
St. Mawgan & Co. Limited

**Gartner**  
Financial Services  
Technology  
Summit 2007

24-25 September 2007  
London Hilton Metropole

Register before 27 July 2007 and save €300  
off the standard delegate rate

# Navigating a Client Driven World

## INTRODUCTION FROM THE SUMMIT CHAIRS



Competitors are going global and are targeting your clients down the street. Traditional business processes, products and services won't cut it in an environment that demands flexibility, agility and speed. Wherever you look, the latest social network or blog feeds your clients information. This "noise" tells your client what to think, what to buy and who to buy it from. You no longer are the main distributor of product or knowledge. Your clients – whether consumer or corporate – are now in the driver's seat, sifting through the information they need to guide their financial present and future. Your enterprise must plot a course to succeed in this world.



Welcome to the second annual Gartner European Financial Services Technology Summit. Last year's inaugural Summit was a great success on every level, and our experience at that event has helped us to develop an even stronger agenda for this year's Summit.

We've reflected this experience in a new program packed with European-focused content. We'll present three tracks – on Business Strategy, Operational Excellence and Technology & Applications, plus a new "virtual" track on the Emerging Trends and Technologies that will shape the future of the Financial Services Industry. We'll focus on the three major industry sectors, Banking, Investment Services, and Insurance and drill down into several key topics that are of common interest to all – business strategy, compliance, sourcing, price optimization, IT operations and architecture.

Fifteen Gartner analysts, leading industry luminaries, and a host of case study speakers will help you to identify the business and IT strategies that will enable you to deal with your clients on your terms – before they deal with someone else.

So browse the program, add the dates to your diary – and don't forget to book now to get the Early Bird discount!

See you at the Summit!

Handwritten signature of Peter Redshaw in black ink.

**Peter Redshaw**  
Research Director,  
Banking and Investment Services

Handwritten signature of Vincent Oliva in black ink.

**Vincent Oliva**  
Managing VP,  
Financial Services



*“Ensures I know what is happening in the financial industry and, more importantly, helps me identify the impact of IT and what I need to do about it.”*

D. Stutter, Payments Architect, Lloyds TSB

## BENEFITS OF ATTENDING

- **Discover effective business and IT strategies** specific to the financial services industry
- **Explore the technologies** that can help execute those strategies
- **Get the latest Gartner research first**
- **Share your experiences** with your peers
- **Hear strategic keynotes** from the best minds in financial services IT
- **Learn from pioneering European case studies**
- **Meet the vendors** and see the demos
- **Focus Gartner analysts** on your toughest problems, one-to-one
- **Take away the complete event CD** and spread the knowledge
- **Enjoy the networking events**

## WHO SHOULD ATTEND

Every senior IT and business professional in banking, insurance and investment services, across a range of disciplines, including:

- IT • Operations • Architectures • Compliance
- Sales & Marketing • Customer Service
  - Project Teams • Contact Centres
  - Networks • Data Centres • CRM
  - Applications & Integration

## KEY TOPICS

The Summit will explore the current state and future evolution of topics including:

- **Aligning IT and the Business**
- **Compliance and Risk Management**
- **Payment and Transaction Systems**
- **Price Optimization**
- **Sourcing, Procurement, Governance, BPO and Offshore Outsourcing**
- **Emerging Technologies**
- **Front and Back Office Foundational Systems**
- **Enterprise Architecture**
- **Fraud and Security**
- **Regional Variations in Financial Services**
- **Multichannel Integration**
- **Agility**
- **Business Continuity Management**
- **Lifecycle Management**
- **Platform Migration**
- **Networks and Marketplaces**

## New for 2007

A new addition to the agenda this year are four pre-event tutorials taking place on Sunday, September 23rd. Designed to get you up to speed for the Summit, the tutorials will focus on:

- **Fraud Detection and The Race To Succeed**
- **Banking in Eastern Europe: Market Trends and IT Priorities**
- **Customer Onboarding**
- **Enterprise Risk Management**

**Further details can be found on page 6**

## Tracks

In three parallel tracks, plus a new virtual track, Gartner analysts will guide you through the tools, technologies and strategies you'll need to succeed in the client driven world.

### 1 BUSINESS STRATEGY

Financial services institutions must find ways of dealing with the change in the balance in power from provider to consumer. Applying 21st century technology to 20th century processes won't be enough. This track provides scenarios for the future and offers advice and insight on how expected changes in the financial services business environment will affect technology initiatives.

### 2 OPERATIONAL EXCELLENCE

Aligning business and IT so that they work effectively together is easy to describe but hard to achieve. Poor linkage can damage not just your operations but also your reputation with the customer. This track provides practical "how-to" advice on how sourcing models, architectures and optimization can all help to realize those synergies between business and technology. Vendor selection criteria and sourcing success stories will give you the tools to utilize your learnings from these presentations when you return to the office.

### 3 TECHNOLOGY & APPLICATIONS

New technologies can help transform your business, but if poorly executed or ill-chosen, they can destroy value. This track dissects the technologies and applications most relevant to bankers, investment firms and insurers. Re-architecting for the future will be a key focus, with its consequent impact on sourcing, applications and the vendor offerings that target financial services firms.

### V VIRTUAL TRACK: EMERGING TRENDS & TECHNOLOGIES (NEW)

The Financial Services industry has long been regarded by other sectors as the leader in the adoption of new technologies. This "virtual" track focuses on the emerging technologies and strategies that must be considered by Financial Services organizations who wish to stay in touch with their customers – and one step ahead of the competition.

# Meet the Gartner Community

For over 25 years, Gartner analysts have been the trusted advisors to many of the world's largest and most demanding organizations. No one sees the implications of technology so clearly, so consistently.

Gartner analysts draw constantly from the real-life challenges and solutions experienced by more than 45,000 clients worldwide. The value of this resource, combined with our deep analysis of technology vendors, is unrivaled.

The Gartner Financial Services Technology Summit brings a level of experience and expertise that you simply cannot get anywhere else.

## Worldwide Expertise at Your Fingertips – Your Financial Services Technology Questions Answered!



**Robert H. Booz**  
Vice President and Distinguished Analyst, Insurance

*"The lines between financial services and insurance continue to blur as consumers look to personally tailored problem solving rather than product selection to solve problems."*

**Focus Areas:** Healthcare financing, catastrophe management for insurers, insurer business operations issues



**Annemarie Earley**  
Managing VP, Insurance

*"Outside forces can disrupt the best internal fraud detection processes that Financial Service organizations have in place. Fraud detection tools and technologies provide insight into what seems to be the unimaginable but is, in fact, predictable."*

**Focus Areas:** Reinsurance, fraud detection technologies, billing and collections, emerging payment routines



**Don Free**  
Research Director, Banking & Investment Services

*"Core banking replacement will fail as a business enabler without corresponding transformational business strategy."*

**Focus Areas:** Core banking, architecture, and business process strategy



**David Furlonger**  
Managing VP, Financial Services

*"In the bifurcated industry ecosystem, tomorrow's competitive differentiators will be organizational flexibility and responsiveness, balancing short-term goals with long-term strategy, and the ability to attract and retain skilled employees."*

**Focus Area:** Financial services, emerging business and technology trends



**Kimberly Harris-Ferrante**  
Research VP, Insurance

*"Organizational flexibility, agility and innovation are critical in the financial services and insurance industries. New IT approaches, including the use of SOA and strategic outsourcing, are required."*

**Focus Areas:** Insurance strategies and technologies, outsourcing trends



**Andy Kyte**  
Vice President & Research Fellow

*"Managing business applications is a critical business competence but managing a portfolio of applications as a coherent whole demands a quantum leap in management capability."*

**Focus Areas:** Applications governance and strategy, applications life cycle management, IT procurement, sourcing project professional services



**Douglas McKibben**  
Research VP, Banking & Investment Services

*"Banks that expect to retain and grow relationships are compelled to take a more comprehensive approach to customers with a service and information delivery model that meets the needs specific to the individual customer."*

**Focus Areas:** Corporate banking, financial supply chain integration, payments and risk management



**Kristin Moyer**  
Principal Research Analyst, Banking & Investment Services

*"Banks should begin making changes to their in-house card management software systems. Banks can use these changes as a starting point for payment convergence."*

**Focus Areas:** Payment architectures and processes, business and industry strategy, business processes, risk management and compliance



**Alistair Newton**  
Research Director, Banking & Investment Services

*"For many financial services companies, their approach to customer on-boarding can signal the beginning of the end of their customer relationship – there are plenty of lessons to be learned on how to avoid such disasters."*

**Focus Areas:** Core banking renewal, online banking and payment authentication



**Vincent Oliva**  
Managing VP, Financial Services

*"Innovation in Financial Services is not just the purview of business leaders. It can emanate from technology leaders who understand the challenges and priorities of the business and can help navigate a client driven world."*

**Focus Areas:** Head of financial services vertical research



**Vittorio D'Orazio**  
Principal Research Analyst, Banking & Investment Services

*"Domestic bank consolidation and cross-border mergers are creating opportunities for IT vendors catering to both expanding banks from Western Europe to the Eastern European countries and in the indigenous greenfield operations."*

**Focus Area:** Industry market strategies: forecasting and vendor strategies (financial services, EMEA)



**Peter Redshaw**  
Research Director, Banking & Investment Services

*"The increasing competition across financial markets is going to offer institutions many more places to connect to, and ways to connect to them – making the right choice is going to get tougher and more important."*

**Focus Areas:** Investment services: business processes, outsourcing, spending



**Frank Schlier**  
VP, Distinguished Analyst, Banking & Investment Services

*"While the financial institution of the future will achieve competitive differentiation through business strategy, design of operational and analytic information systems will be a primary source of competitive advantage or disadvantage."*

**Focus Area:** Emerging business and information architectures with a focus on the global financial services industry



**Christophe Uzureau**  
Principal Analyst, Banking & Investment Services

*"The survival of banks' retail payment operations depends on Relationship Payments: payment products and services that take into account the information contained in and peripheral to a transaction."*

**Focus Areas:** Dematerialization of payments, emerging payment systems and services, retail payments industry trends



**James Wolstenholme**  
Research Director, Banking & Investment Services

*"Derivatives are complex financial instruments so let's make sure their technical operational flows stay controlled and simple."*

**Focus Area:** Investment services: business and industry strategy, trading systems, middle and back office systems

# Speakers



## KEYNOTE SPEAKERS

**David Furlonger**  
Managing Vice President, Gartner



David Furlonger leads Gartner's worldwide research agenda for the investment services industry with responsibility for technology and business research. His areas of expertise include corporate/investment banking, security brokerage, venture capital, asset management and corporate treasury. His specific research focus is industry structure-trends and directions, strategy, business and IT architecture, straight-through processing and the real-time enterprise, regulation, risk management, trading and outsourcing. Mr. Furlonger has more than 20 years of experience in the financial services industry. Prior to joining Gartner, he acted as a consultant to the industry for vendors as well as consultancy companies and financial institutions.

**Frank Schlier**  
Vice President, Distinguished Analyst,  
Banking & Investment Services, Gartner



Frank W. Schlier is a vice president and distinguished analyst in Gartner's banking industry research and advisory team. Mr. Schlier's research coverage areas include the bank of the future and directions in banking information system design. Prior to joining Gartner, Mr. Schlier was president and COO of WhiteWater Information Technologies, a software product development and marketing company serving the financial services industry. Mr. Schlier has 16 years of experience as a chief information officer and five years as a chief information architect in financial services.

**Gerald Ashley**  
Managing Director, St. Mawgan & Co.



Gerald Ashley has some thirty years experience in wholesale banking & finance. He began his career in the City at Baring Brothers in 1977, and spent eighteen years at the merchant bank. Subsequently he spent three years at the Bank for International Settlements in Basel Switzerland. He is now Managing Director of St. Mawgan & Co. Limited which he co-founded in 2003, a London based consultancy specialising in risk management, strategy consulting for banks, and behavioural finance modelling in business and risk taking. Gerald is an External Examiner and Guest Lecturer at Newcastle Business School.

## END USER CASE STUDIES

**Stuart Gilmour**  
Head of UK Wealth Application Delivery, Chief Information Office, Barclays Bank  
**Agile Delivery Empowering Customers for Branch Based Sales**

**Stefan Sutter**  
Head of Sales & Advisory IT, Deutsche Bank  
**Industrialization in Banking & IT**

**John Carr**  
Chief Operating Officer, HSBC IT  
**A Service Organisation Model for IT**

**Neil Buckley**  
CTO, Retail, Wholesale Banking, Insurance and Facility Management of ING  
**Ten Lessons from the Future**

**Thijs van Koppen**  
EVP Finance & Operations, Robeco Direct  
**Linking Outsourcing to Strategy: Practical Lessons in Business Process Outsourcing**

**Ken Janssens,**  
Executive Director, Investment Banking Technology, JP Morgan  
**Investment Banking: Breaking Down the Walls Between Client Information Applications**

**Magí Clavé,**  
Director IT Projects/Senior Manager, European Central Bank  
**Aligning IT and the Business at the European Central Bank**

## EXPERT PANEL



**Martin Taylor**  
Group CIO, LCH Clearnet  
Martin Taylor joined LCH as Interim CIO in June of 2006, and was appointed Group CIO in January 2007. He has worked in IT all his working life, starting with British Airways in 1976, followed by a decade at Mars in the 1980's. Other roles included Group CIO at Courtaulds plc and Group CIO at EMI Music. In 2001 Martin commenced portfolio work with a mix of personal investment, consulting to Paul Allen's European private equity business, and a Non Executive position on UK Governmental Police and Security IT Boards. He returned to the FTSE 100 in 2003, as Group CIO for Cable & Wireless plc.



**Neil Buckley**  
CTO, Retail, Wholesale Banking, Insurance and Facility Management of ING  
Neil A. Buckley joined ING in December 2004 as CTO within ING Operations & IT Banking. He holds full P&L accountability, and is responsible for the design and execution of the strategic direction for the infrastructure of an internal technology group. Prior to joining ING, Neil was Vice President and CIO International Operations at General Motors Acceptance Corporation. Over the past 15 years he held several senior positions with a number of major insurance and financial-services companies. These include Norwich Union Insurance, Bankers Trust in New York and London, and Merrill Lynch in Tokyo and New York. Neil received B.Sc., Honours, Mathematics from Aston University England.

*"The Summit provides a clear direction on the industry focus and current paradigm."*  
Sarah Thacker, SNR Business Systems Analyst,  
Capital One

# Conference Program

## PRE-SUMMIT TUTORIALS

Pre-Summit Tutorials take place on the afternoon of Sunday 23 September 2007

### Tutorial A: Fraud Detection And The Race To Succeed

Fraud is a serious and growing crime that plagues organizations and their customers. Financial institutions must attack this issue with robust fraud prevention and detection technologies. This session presents the trends, IT strategies and tools for combating fraud.

- What are the trends and market dynamics?
- How can financial organizations create fraud management strategies to position themselves for success?
- What solutions are required to detect and prevent fraud?

Annemarie Earley

### Tutorial B: Banking in Eastern Europe: Market Trends and IT Priorities

Card payments, lending for the corporate and private sector and bank consolidation are shaping the banking landscape in Eastern Europe. Market trends, IT drivers and inhibitors are necessary information to achieve a consistent growth strategy for the Eastern European markets.

- What is the IT state of art for the different Eastern European countries?
- How could you successfully integrate your Eastern European strategy with IT solutions?
- Where are the best IT options for consolidating your IT strategy?

Vittorio D'Orazio

### WHO SHOULD ATTEND?

These tutorials are ideal if you are:

- Laying the foundations for a new project and want to avoid the common pitfalls
- Looking for guidance on common practice to take you to the next level
- Seeking advice on how to overcome challenges you are currently facing

For registration, see page 12



*"This event provided a great opportunity to share and compare the different approaches from both industry competitors and vendors. This allowed us to evaluate our own efforts and re-align them with our positive findings. A great event, more than I expected."*

R. Andrew Brice, Head of IT Risk, Credit Suisse Group

### Tutorial C: Customer Onboarding

For many Financial Services organizations, the process of customer onboarding is viewed as the final step in acquiring new customers, and limited time and resources are deployed to ensure that the customer experience is just right. This presentation identifies strategies and technologies for effective customer onboarding.

- What are the key errors that organizations are making in their onboarding strategies?
- Best practices from outside the Financial Services Industry
- Tools, techniques and technologies for effective onboarding

Alistair Newton

### Tutorial D: Enterprise Risk Management

Risk to a financial services firm comes in many dimensions. As corporations move to real time, so does risk. This session examines market, credit and operational risk, regulations and the key elements of an integrated Enterprise Risk Management program.

- What is the role of Enterprise Risk Management in corporate performance management and compliance?
- What are the elements of a sound ERM program?
- What role do data and the management of data play in ERM?

Vincent Oliva

## PLENARY SESSIONS

### Gartner Keynote: Four Fundamental Truths About Financial Services – The Questions No One Wants to Answer

Are financial services providers transforming themselves to address the acceleration of continuous change – or just transforming to the next change state? Here are four fundamental truths that will challenge financial services firms to approach business differently.

- Why innovation in financial services is dead
- Do financial services providers need customer relationships?
- Is "relationship management" whipping up the perfect storm for transformation?
- Financial services providers are technology firms so why is their cost of technology so high?

Frank Schlier, VP, Distinguished Analyst  
David Furlonger, Managing VP, Gartner

### Guru Keynote: "The Next Five Years – Perfect Opportunity or Perfect Storm?"

Better, Faster, Cheaper will always be the customer's demand in financial services. Recent moves in the marketplace show that this is going to intensify – for service providers and intermediaries this presents an enormous challenge. Increasing market transparency, declining margins and a series of outside disruptors are going to shape the next five years in financial services. Traditional models will fail but some innovative Financial Services firms have found ways to prepare themselves to survive and prosper in this new landscape.

Gerald Ashley, Managing Director, St. Mawgan & Co.

### Expert Panel Keynote: Attracting and Retaining Customers in the Client-Driven World

Maintaining competitive advantage and attracting and retaining profitable customers are key issues for financial services executives in 2007. These may be nice priorities to have, but earning above average returns in the industry will only be achieved if CEOs focus their thinking on the resources and capabilities required to achieve these goals. IT represents a major resource that can contribute towards the achievement of this. Gartner's panel of leading IT luminaries will discuss the major imperatives in their organizations, challenges they face, and the difficulties of "navigating in a client-driven world". They will discuss the use of technology to enable business growth, how to demonstrate the value of IT to the business, IT management and innovation, and execution of IT strategy.

Martin Taylor, LCH Clearnet  
Neil Buckley, ING  
Moderated by Vincent Oliva, Managing VP, Gartner

### The Gartner Closing Keynote: The Future of Money

Radical changes in monetary technology are fast approaching. Learn about the societal, economic, and political shifts that will reinvent the nature of money, payment, and clearing mechanisms.

- What role will virtual online worlds play in the transformation of money?
- What will these changes mean to entities engaged in managing and moving money?
- Will global/regional converged money and payment systems prevail, or should you plan for continued heterogeneity?

David Furlonger, Managing VP, Gartner

Look for the following symbols to ensure you attend a relevant session:

**(B)** = Banking, **(INS)** = Insurance, **(INV)** = Investment, **(V)** = Virtual Track



## TRACK 1: BUSINESS STRATEGY

Financial services institutions must find ways of dealing with the change in the balance in power from provider to consumer. Applying 21st century technology to 20th century processes won't be enough. This track provides scenarios for the future and offers advice and insight on how expected changes in the financial services business environment will affect technology initiatives.

### Insurance Multichannel Integration (MCI): Fulfilling Customer Needs and Protecting The Brand (INS)

Increase customer satisfaction, brand loyalty, and meet regulatory requirements through multi-channel integration. This presentation gives a detailed overview of MCI strategies, principles, and distribution technologies.

- What are the key elements of integrated, intelligent channel architecture?
- How should insurers invest in integrating their channels and improving transaction processes?
- How can MCI support cross-channel interaction and provide different information through each channel?

Kimberley Harris-Ferrante

### The Wild Wild East of Retail Banking: China (B)

China's retail banking sector holds great promise for banks, offering the right products and services via the right channels. Explore the opportunities and challenges this market liberalization presents to both domestic and foreign banks.

- Which financial products and services do Chinese consumers use?
- What are Chinese consumers' preferred interaction methods with financial services providers?
- How can foreign financial services providers leverage distribution and relationship strategies and technologies?

Christophe Uzureau

### Get Over The Retail vs. Commercial Banking Divide (B)

As their products and services commoditize, banks are seeking to differentiate service delivery for retail and commercial customers. By ending the divide that isolates retail and commercial offerings banks can use "mass customization" and multi-channel integration techniques to focus on the customer.

- How will the end of the retail/commercial banking divide help banks differentiate?
- How can banks eliminate the business divide between retail and commercial banking?
- What technology strategies can be leveraged across retail and commercial banking?

Douglas McKibben

### Integrating Risk Data Into Enterprise Data Initiatives

Conventional risk data management approaches are ineffective in today's customer driven world. Traditional siloed risk data must be integrated with enterprise data to enable complete identification of customers and their requirements. We examine:

- How customer-driven marketplaces change the best practices for the management of risk data.
- The management of risk data today and the corporate performance issues.
- How to respond architecturally to changing risk data requirements and institute holistic approaches to data management

Douglas McKibben

### MiFID: Have You Missed The Boat? (INV)

With just two months until MiFID comes into force, what can you usefully do to be ready? Applying a triage of delay, delegate and do-it-yourself could help you make the cut.

- What can be done later or ignored?
- Who can help you achieve compliance?
- What do you need to do yourself right now?

Peter Redshaw

### Business Process Outsourcing and Agility in Financial Services (V)

Are BPO and agility complementary or at cross purposes? The inflexibility of business process outsourcing deals is often cited as a major factor in their failure to satisfy financial services users.

- What is driving BPO in Financial Services?
- What type of agility is needed?
- How do collaboration and co-opetition change the dynamics for BPO?

Peter Redshaw

### AGENDA BUILDER: ONLINE TOOL!

To enable you to build your own personal agenda and select the sessions that are relevant to you, please use our **online Agenda Builder** to ensure you make the right decisions and get the best value from the Summit.

For details please visit [www.europe.gartner.com/fst](http://www.europe.gartner.com/fst)



*"The Summit provides a valuable insight into the future trends and importance IT plays in the financial services sector."*

Steve Thompsett, Technical Architect, Legal & General

# Conference Program



## TRACK 2: OPERATIONAL EXCELLENCE

Aligning business and IT so that they work effectively together is easy to describe but hard to achieve. Poor linkage can damage not just your operations but also your reputation with the customer. This track provides practical “how-to” advice on how sourcing models, architectures and optimization can all help to realize those synergies between business and technology. Vendor selection criteria and sourcing success stories will give you the tools to utilize your learnings from these presentations when you return to the office.

### Financial Services – Ready For The Disaster, Are You Ready For The Catastrophe?

Catastrophes particularly affect financial services organizations as the demand for their services often increases just as their capacity to provide services decreases. This session advises on how organizations can equip themselves to cope with the catastrophe phenomenon.

- Are financial services companies prepared to quickly restore essential business functions?
- Could demands for services expand beyond the established customer base to society at large?
- Can traditional contingency planning give a false sense of preparedness?

**Robert Booz**

### Optimize Now! (M)

Results of the 2007 Gartner Pricing Optimization Technology Survey show that banks need to improve profitability and extend product lines into new markets. This session highlights the potential and best practices for companies seeking enhanced profits through price optimization.

- What is the current state of pricing optimization in banking?
- What are the expectations for price optimization in banking by 2012?
- How can price optimization help to win and retain customers?

**Alistair Newton**

### Things You Should Never, Ever Outsource!

Your financial services firm must consider not just which processes but also which data, algorithms and systems can be outsourced. Inform your analysis with a holistic approach to brand reputation, commoditization, security, risk and compliance, and cost savings.

- What are the decision criteria for Financial Services outsourcing?
- How do you achieve a fusion of in-house and outsource instead of fission?
- Where are the practical examples of this working?

**Peter Redshaw**

### Developing Logic and Data Design Protocols for The Information Age Bank (V) (B)

Since the 1960s, banking has been in “automation transition” – applying early information age technologies to industrial age processes. Get an inside look at the future of banking data design in the information age.

- How will information-age banking negatively impact traditional logic and data design strategies?
- What new protocols must banks develop for logic and data design in the information age?
- What methodologies will banks use to develop these new protocols?

**Frank Schlier**

### Architectural/SaaS Foundations and Enabling Technologies for The Customer-Responsive Financial Services Firm

Agility requires financial services firms to re-energize their architectural and infrastructure initiatives. Can past disillusionment with SOA and EDA help set realistic expectations in designing and operating agile organizations?

- The customer is in charge: what are the implications?
- What architectural practices enable agility and responsiveness?
- What technologies provide foundations for improved event detection, analysis, and response?

**Don Free**

### Relationship Payments: The Survival of Banks' Retail Payment Operations Depends On Them (B)

As non-bank payment providers increasingly capture consumption patterns, banks are losing revenue and connection with consumers and merchants. Discover how relationship payments can ensure the long-term financial health of both issuing and acquiring operations.

- Are current retail payment services meeting marketplace requirements?
- How can banks avoid payment product and service commoditization?
- What are the implications for the governance of payment operations?

**Christophe Uzureau**

## At a glance schedule

### TUTORIALS

**Sunday 23 September**

**16.00 – 18.00** Pre-Summit Tutorials

### DAY 1

**Monday 24 September**

**07.30**

Registration

**08.45**

Conference Opening & Introduction

**12.00 – 13.00**

Lunch

**18.30**

Networking Drinks Reception

### DAY 2

**Tuesday 25 September**

**08.30**

Conference Starts

**12.40 – 13.40**

Lunch

**17.00**

Conference Closes

*"This event should take place twice a year.  
Excellent balance between business and IT matters."*  
Bomdan Lenart, IT Solutions Architect, Bazy I System Bankowe

## TRACK 3: TECHNOLOGY & APPLICATIONS

New technologies can help transform your business, but if poorly executed or ill-chosen, they can destroy value. This track dissects the technologies and applications most relevant to bankers, investment firms and insurers. Re-architecting for the future will be a key focus, with its consequent impact on sourcing, applications and the vendor offerings that target financial services firms.

### The Future State of Core Banking (B)

Although front-office technologies perform an essential supporting role, the key to innovative core banking lies in the vast functionality of the back office. Discover how banks with the greatest agility will seize future business opportunities.

- What business conditions will drive metamorphosis in the back office?
- Which technologies have the greatest potential to evolve core banking systems?
- What lies ahead for the core banking systems market?

**Don Free**

### Enterprise Platform Migration – The End of Accidental Applications Architecture

There is not a single financial services company on the planet that currently runs an application portfolio through choice. Existing portfolios have been created through a policy of serial acquisition of silo applications. The challenge of delivering agile and innovative solutions to the business is being severely hampered by the complexity of the existing applications portfolio. Without radical action, the problem will only get worse.

- What are the strategic options for managing the applications portfolio over the next 5 years?
- How should Business and IT managers organize themselves to transform the agility of the applications portfolio?

**Andy Kyte**

### Crossing Networks, Dark Pools and Cross-Border Trading: Trends in The Brave New (Flat) World (INV)

Alternative execution venues, cross-border trading and the use of derivatives are changing where and how investing gets done. This presentation looks at how industry dynamics and technology will change how, where and what we trade, and the implications for financial providers and investors.

- What are the implications of new alternative trading venues?
- How will the reliance on complex trading tools change the dynamics of investing?
- What will anytime, everywhere global trading mean for the investment services industry?

**James Wolstenholme**

### Financial Services – You Don't Need SOA When You Have COBOL

Why undertake the risk of core system renewal when staying the course might be the best business and technical strategy? Learn how to determine when legacy renewal or hybrid SOA solutions are the better solution.

- Why are firms evaluating the efficacy of their core legacy systems?
- What are the future trends in clearing and settling systems?
- How can you succeed in the core system renewal game?

**James Wolstenholme**

### Card Management System and Sourcing Promote Growth and Competitive Strength (B)

Issuers and acquirers should re-evaluate their card management systems and sourcing options as electronic payment growth, card growth and emerging payments require banks to be increasingly flexible. Institutions with effective card management systems and sourcing options will be positioned to achieve higher rates of growth and competitive advantage than rivals.

- How can you remain competitive in dynamic payments markets?
- What are the best BPO practices and strategies, and which should you adopt to fuel your growth?

**Kristin Moyer**

### Insurers Transform The Business With Product Lifecycle Management (V) (INS)

Innovative insurers are integrating product lifecycle management and product development processes more tightly with marketing and distribution. Get the inside track on next-generation product development processes and learn how to build more profitable products.

- What are next-generation product development requirements for the insurance industry?
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**Kimberly Harris-Ferrante**

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