Overview

The world’s most important gathering of CIOs and senior IT executives, Gartner Symposium/ITxpo 2014 in Orlando, FL, had unprecedented demand this year and was one of most talked about and exciting conferences in its history. This conference is committed to guiding attendees on a journey toward achieving success in the digital world.

During five conference days, 8,000 attendees examined and explored the following:
- 500 sessions in the CIO Program and 9 role-based tracks
- Industry Sunday, which focused on 13 verticals
- Gartner analyst one-on-ones: 6,300 appointments took place
- 4 Mastermind Interview keynotes
- 290 ITxpo exhibitors
- New session formats, including Espresso sessions
- Signature Series sessions: top attendee favorites, which cover trends and technologies
- The highly anticipated reveal of the 2015 CIO Agenda survey results

This Executive Summary Report focuses on event highlights and the three major crosscutting themes that helped shape the Gartner Symposium/ITxpo 2014 CIO Program agenda. Together, they offered attendees a clear path to digital empowerment and new ideas to help them lead and grow within their organizations.

Defining digital business

Digital business creates new business designs by blurring the boundaries between the digital and physical worlds. Digital business promises to usher in an unprecedented convergence of people, business, and things that disrupts existing business models. With more than seven billion people and businesses, and at least 35 billion devices, communicating, transacting, and even negotiating with one another, a new world comes into being — the world of digital business. What are the characteristics of the digital business?

1. **Things become major players.** Digital business is specifically focused on mediated interactions among business (including process and information), people and physical things as equal entities.
2. **You must digitalize.** To be a digital business, an organization must be digitalizing its physical assets as well as its virtual assets, such as data and business processes.
3. **Industries blend.** A digital business must include the connection or integration of assets (business, people and things) beyond IT and beyond the control of any one company.
Driving Digital Business: Three crosscutting themes

1. Renovate the core

**Retrofitting core IT functions to more fully align with the purposes and potential of digital business**

Enterprise IT — infrastructure, applications such as ERP, information and sourcing — was built for the IT past and must be renovated to address the challenges and opportunities of the digital future. Changes should include moving to a more loosely coupled “postmodern ERP” paradigm, deploying public and private clouds, creating the information architecture and capabilities to exploit big data, and augmenting conventional sourcing with more innovation — including sourcing from, and partnering with, smaller and less mature enterprises.

The emergence of digital business will also require different metrics, approaches and outcome requirements to balance complexity with simplicity, which is the challenge for all transforming enterprises. Managing a portfolio of businesses, business capabilities or investments will be essential to delivering the digital business, bimodal IT and expected outcomes. More or less complexity is not the issue; knowing when to simplify and where to take risks is paramount.

**Recommended resources**

**Research reports:**
- Leading in a Digital World: Gartner Symposium/ITxpo Highlights
- Future of EA 2025: Evolving From Enterprise to Ecosystem
- Seize the Moment: Driving Digital Business Into 2015
- Six Ways to Drive Cost and Value Optimization for IT Operations

**gartnernews.com:**
- Are CIOs Ready for Digital Business?
- How Emerging Trends Are Impacting Infrastructures and Operations
- Examining Cloud Maturity and Adoption in the Age of Digital Business
- Six Steps to Build a Successful Digital Business

2. Exploit the new

**Connecting innovation, transformation and market leadership to ensure digital business success**

The pace of technology change will affect each enterprise differently, demanding that CIOs continually scan the marketplace to evaluate what will work for the enterprise now and in the future. To capture digital opportunities, CIOs need to deal with speed, innovation and uncertainty. Creation and governance of a two-speed capability within IT is essential to preserving the benefits of the past and creating future benefits. Solid IT and business governance will be crucial to success.

Also affecting the enterprise will be the macroeconomic, demographic and societal changes that react to and drive technology changes. Innovation, transformation and progress in technology are all ingredients to a larger outcome. Translating these IT “things” into business outcomes will require focused CIO effort in response to digital business opportunities, and this translation will become IT’s contribution to business value.

* Access to research reports is limited to Gartner clients only.
3. Provide and cultivate leadership

Gaining the insight, support and strength to lead and deliver in the midst of disruptive change

As the larger enterprise changes, the nature and focus of CIO leadership styles will change as well. As external market changes require dynamic enterprises, the original mandate for CIOs in their current role may become redundant. Digital business necessities will require some CIOs to increase their influence and power, while others will cede theirs to CMOs, CDOs and CTOs. The agility of the enterprise depends on the CIOs’ willingness to change and their ability to create the art out of influence, leadership and collaboration.

To exploit digital opportunities and ensure that the core of IT services is ready, there must be clear digital leadership, strategy and governance, requiring all business executives to become digitally savvy. To that end, clarifying the coverage and scope of digital leadership — and integrating it with enterprise IT leadership — should be high on every CIO’s agenda in 2015. But individual digital leaders are not enough; all business leaders must become digital leaders.

Recommended resources

Research reports:
Flipping to Digital Leadership: The 2015 CIO Agenda
Using Paradoxes to Build Digital Business Leadership

gartnernews.com:
Why CIOs Must Flip Three Leadership Behaviors
Who’s on Your Digital Business Dream Team?
Who’s Got Talent on the Digital Frontier?

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In this year’s opening keynote, Gartner builds on the platform of social, mobile, analytics and cloud with the rise of the digital business. Digital business is defined as the blending of virtual and physical worlds, changing how processes and industries work through the Internet of Things (IoT). Gartner estimates that enterprises will spend more than $40 billion designing, implementing and operating IoT in 2014. This digital shift creates new businesses and can threaten many existing businesses. As a result, the typical IT budget is changing.

Today, Gartner estimates that 38% of total IT spending is outside of IT, with a disproportionate amount in digital, and by 2017, it will be over 50%. With greater buying power outside of IT and with a digital focus, the breakdown of spending will look more like 45% services, 25% personnel, 20% software and 10% hardware.

Shifting to the discussion of machines versus humans, Gartner is making several key predictions:
- By 2025, three out of 10 jobs will be converted to software, robots or smart machines.
- By 2018, digital business will require 50% fewer business process workers.
- Also by 2018, the total cost of ownership for business operations will be reduced by 30% through smart machines and industrialized services.

To balance the machinist view, we also introduced the Digital Humanist Manifesto, which puts human-centered design at the heart of solution delivery.

Lastly, the keynote covered other trends to watch in this new technology cycle, including the growing demand for digital talent, a shift in leadership skills, governance and vendor management as the vendor ecosystem broadens and customer experience and design moves to the center. However, this does not mean IT departments are abandoning core technologies. In fact, Gartner continues to stress bimodal IT. Mode 1 is traditional, emphasizing safety and accuracy. Mode 2 is nonsequential, emphasizing speed and agility.
Mastermind Interview keynotes

This year’s interviews brought fresh perspectives on innovation, transformation and leadership in the digital era from some of today’s most important industry thought leaders.

Satya Nadella, Chief Executive Officer, Microsoft

View session

Interview highlights
The interview was conducted by Gartner analysts Drue Reeves and Merv Adrian.
Satya Nadella repeated the themes from his recent “Bold Ambition and Our Core” message — that is, “We live in a ‘mobile first, cloud first’ world.”

His Windows 10 response was that the real key to the announcement was the universal application strategy and what he described as one OS that is optimized for the platform, from mouse and keyboard to touch.

On the Internet of Things, Nadella discussed Microsoft’s end-to-end strategy: Windows as a secure endpoint that allows for policy and controls (but not the only endpoint — he clearly recognizes that this will be a heterogeneous environment).

Nadella also stressed that Microsoft is not taking a Microsoft-only view and discussed openness, from both a device and a programming language standpoint.

Peter Thiel, Technology Entrepreneur and Investor

View session

Interview highlights
The interview was conducted by Gartner analyst David Furlonger.

“It’s hard to get initial adoption for new technology.” New technologies need a strong value proposition. The best route is to focus on a narrow group that really needs it.

“Aim for monopoly, don’t just look to compete.” Companies and investors tend to invest in a number of projects because they don’t know what’s going to work. Peter Thiel does not believe that this is a good way to invest. Instead, he believes in the concept of “complex coordination around a well-defined plan” when moving forward with an idea. In other words, focus on doing a few things right and in depth instead of trying to spread your intellectual and financial capital across many initiatives.

The world hasn’t really innovated since 2000. Thiel believes that we live in a financial and capitalistic age, but not a scientific age. He believes this focus on the financial aspects limits the ability of companies to deliver breakthrough technologies.

“My bet on technology trends is always on things that are fact-specific and not buzzword-dominated.”

Peter Thiel

“For Microsoft, I want us to be the best in the world for productivity. This includes individuals, teams and business process.”

Satya Nadella
Interview highlights

The interview was conducted by Gartner analysts Ken Dulaney and David Willis.

Steve Wozniak suggests that engineers need to design products that they will use and should not rely entirely on the marketing department for those types of decisions. He says engineers need to focus on things that are clever, unusual and, most important, fun. He likes designing products that everyone says will not succeed. He pointed out Tesla, personal computers and the iPhone as examples of products or companies that skeptics suggested would not work.

Wozniak thinks Moore’s Law is nearing an end. He actually views this as a positive thing because he felt society was looking to replace humans with machines, and that the technology may now not be able to achieve that.

“One of the best things an engineer can do is design products he would like to own himself.”

Steve Wozniak
Interview highlights

The introduction was given by Chris Howard, Vice President and Distinguished Analyst. The interview was conducted by Bob Safian, Editor-in-Chief, Fast Company.

John Zimmer learned about the history of transportation in college and it spurred him to think, What is the next network going to look like? What will the occupancy of our road infrastructure be in the future? He commented, “Today, over 80% of car seats are empty and that’s incredibly inefficient.” Traffic costs $80 billion in lost productivity per year — at a macro level, that’s a big problem; for an individual, it is the second highest expense per year.

In response to the fact that Lyft is a nontraditional business model, Zimmer commented: “There is this really difficult social concept to get over — you’re getting in someone else’s car — it’s emotional and it’s new.”

Zimmer reflected on what drives him, when asked, If you have an entrepreneurial idea — how do you keep that dream alive? “You keep pushing through. You have to be responsible, driving forward with what you believe in. Think about the users, and design the solution for them.”

Vision of the future

Zimmer concluded, “My business is evolving the freedom of car ownership — it’s pioneering and exploring — this is something that hasn’t evolved in 100 years, but now is the time.”

“Change is difficult and hard for people. But some of the best things created had to face resistance.”

John Zimmer
The CIO Program

CIO Program highlights

This year’s CIO Program agenda focused on the rapid and fundamental change in IT leadership — helping attendees to redefine the CIO role in the face of digital forces, which must be understood, embraced and leveraged to move the enterprise forward. CIO Program attendees were urged to look for ways to amplify their role and help key decision makers in the enterprise “get” the possibilities of digital business. CIOs were challenged to take a leadership role in helping their organizations change their view of what’s possible — and inevitable — in the digital business future.

2015 CIO Agenda survey results

Why CIOs must flip three leadership behaviors

According to the 2,800 CIOs surveyed in the 2015 Gartner CIO Agenda Report released at Gartner Symposium/ITxpo 2014 in Orlando, the overwhelming majority of this year’s CIO respondents (89%) agree that the digital world engenders new, vastly different and higher levels of risk, and 69% acknowledge that agility is increasingly important relative to risk management.

To guide CIOs in this third era of “digital now, digital first” reality, Dave Aron and Graham Waller, authors of the 2015 Gartner CIO Agenda Report, revealed three striking imperatives for CIOs to “flip” their digital leadership behaviors.

Flip 1: From “legacy first” to “digital first”

To succeed in a digital world, enterprises must escape the inertia and “bad complexity” of a structured, legacy perspective, and focus on the future by starting from a digital perspective and working backward. This includes moving from backward reporting to forward-looking predictive analytics, combined with data-led experimentation. Digital business success requires starting with a digital information and technology mindset, and working backward.

For example, at Volvo Cars, a cross-functional innovation board brainstorms how digital can solve everyday problems through connected cars. In a video interview shown on stage, Klas Bendrik, Vice President and Group CIO at Volvo, discussed the great failure rate of online delivery companies. Volvo’s solution? To create a temporary digital key for retail deliverers to place a customer’s order directly into the trunk of his or her Volvo car. The pilot for Roam Delivery uses digital to solve the customer’s inconvenience of how and where to receive everyday online deliveries.
Flip 2: From what’s visible to what’s valuable

Digital business success requires building platforms that may not immediately generate ROI but that can deal with rapid change and uncertainty and manage value dynamically. In addition, CIOs should categorize investments as fearful, to keep the business running; fact-based, to extend within the organization’s business model; and faith-based with management capable of dealing with them. Value is not created by reducing the cost of IT per dollar of revenue, but by increasing revenue per dollar of IT cost, which equals IT productivity.

Volvo’s Bendrik understands the long-term digital value opportunities. He has formed an innovation team to “drive IT in Volvo cars” and inspires his team. “Up until a few years ago,” he said, “the attitude was, if you don’t do anything, you can’t do anything wrong.” Now, he encourages the entire IT team to step up and contribute to innovation.

Flip 3: From control leadership to visionary leadership

Command-and-control leadership does not suit the digital world. Digital leadership is almost always about vision and inspiration. Education and inspiration are central tasks for CIOs determined to be digital leaders. CIOs recognize this: 75% plan to change their leadership style in the next three years, most commonly by amplifying their vision (47%) while reducing their command and control (65%). At Volvo, CIO Bendrik tries to model customer-centric behavior and reserves time in management meetings to discuss broader megatrends.

In addition to partnering with the most important business stakeholders, and developing a shared understanding of digitalization and what it means to the business, CIOs need to increase the digital savvy of their enterprises. In essence, CIOs and other leaders need to lead a digital cultural revolution across their businesses, possibly their ecosystems.
CIO Program keynotes

A roster of CIO-exclusive luncheon speakers was on hand throughout the week, offering a fresh perspective on leadership, collaboration and other CIO-focused topics.

Arianna Huffington, Chair, President and Editor-in-Chief, The Huffington Post Media Group

Keynote highlights

When you take care of yourself, then everything else is taken care of

In her book “Thrive,” Arianna Huffington takes a look at the science of how our bodies respond to excessive stress and the need to take a break from the heavy demands we place on ourselves to optimize our productivity.

Luckily, more business leaders are coming forward and dealing with pressures: 34% of companies in the United States are introducing wellness programs into their workplaces.

We all need a digital detox: “After work you shouldn’t be on email,” Huffington said, “It is key to disconnect from technology and reconnect with ourselves — that is where the deepest creativity lives.”

“There is a snake in the Garden of Eden — and the snake is our hyperconnectivity,” she cited, and that 27% of the time we deal with email and a sense of urgency.

The questions will always be there: Where is the future going? How can we be ahead of competition? To get the best ideas, we need to connect with ourselves. It requires getting use to doing nothing for short periods of time — as in meditation, for example.

“I firmly believe that the people who are able to be alone in a room, with their thoughts, are the ones who are going to master the world and win the future because they are the ones [who] will come up with the best ideas and see the icebergs before they hit the Titanic.”

CIO Thought Leadership presentations

Senior executives from technology providers presented their vision for the CIO in the following sessions:

IBM: The Future of Cloud for Digital Business
Cisco: Accelerating Innovation With the Internet of Everything — Are You Ready?
VMware: Beyond the Technology Maze — A New Mindset Is Key to IT Transformation
Google: Transforming Culture Through Technology
PwC: 5 Ways Leading CIOs Raise Their Company’s Digital IQ
Lockheed Martin: Building a Digital Defense for Cyber Resiliency

All of these sessions are available on Gartner Events On Demand: gartnereventsondemand.com/event/sym24

View all recorded sessions on gartnereventsondemand.com/event/sym24
Signature Series

Top 10 Strategic Predictions: Digital Business Is Driving Big Change

As a Signature Series session, the top 2015 strategic predictions were announced by Daryl C. Plummer, Vice President and Gartner Fellow; they indicate that computer-based machines are now being used to create an ever-expanding variety of experiences that extend human endeavors.

By 2018, digital business will require 50% fewer business process workers and 500% more key digital business jobs, compared with traditional models.

By 2017, a significant disruptive digital business will be launched that was conceived by a computer algorithm.

By 2018, the total cost of ownership for business operations will be reduced by 30% through smart machines and industrialized services.

By 2020, developed-world life expectancy will increase by 0.5 years, due to widespread adoption of wireless health monitoring technology.

By year-end 2016, more than $2 billion in online shopping will be performed exclusively by mobile digital assistants.

By 2017, U.S. customers’ mobile engagement behavior will drive mobile commerce revenue in the U.S. to 50% of U.S. digital commerce revenue.

By 2017, 70% of successful digital business models will rely on deliberately unstable processes designed to shift as customers’ needs shift.

By 2017, 50% of consumer product investments will be redirected to customer experience innovations.

By 2017, nearly 20% of durable goods “e-tailers” will use 3D printing to create personalized product offerings.

By 2020, retail businesses that use targeted messaging in combination with internal positioning systems will see a 5% increase in sales.

New! Espresso sessions

These 30-minute sessions were provocative, edgy and interactive and were a popular addition to the session lineup. Here are a sample of the types of topics that were discussed:

- Internet of Things: When Things Become Customers
- IT Power Shift
- Make Profits by Preparing Technology for Global Climate Change
- Predicting the Unpredictable: An Introduction to Scenario Planning
- Privacy Versus the World
- The Machine on Your Team
- ‘Trust’ in the Collaborative Economy
- How 3D Printing Will Revolutionize Your Business
- How Gamification Takes Motivation to the Next Level

For conference details, visit gartner.com/us/symposium
Industry coverage at Symposium/ITxpo

In-depth industry sessions began on Sunday with a dedicated day and an evening keynote to kick off the week. These sessions offered targeted research and best practices, spanning the following industry sectors:

- Banking & Investment
- Government
- Life Sciences
- New! Communication Service Providers
- Healthcare Payer
- Oil & Gas
- Consumer Goods
- Healthcare Provider
- Retail
- Education
- Industrial Manufacturing
- Utilities
- Insurance

Industry Sunday keynote

Erik Brynjolfsson, Director, MIT Institute on the Digital Economy

**View session ▸**

**Keynote highlights**

**Entering the second machine age**

Erik Brynjolfsson opened his presentation by identifying how we have traditionally been operating under a power system and a control system — a power system gives you the physical power to transform things; a control system harnesses our mental power, or the ability to organize and change things. However, now we are at the dawn of the second machine age, when technology is changing our brains and providing the power and control through computers, software, big data, and so on — very different from the first machine age. This change in the power system is impacting and shaping the economy as we know it.

“We are in the midst of a 10-year period where humanity went from not being able to talk to machines to being able to talk to machines routinely — that’s an interesting turning point and we are the ones living through that.”

**What does this mean for the economy?**

The second machine age is allowing for tremendous improvement in living standards — what Brynjolfsson describes as “The Bounty.” However, even though we are seeing productivity and GDP at record high levels, employment is down significantly and is causing what he calls “The Decoupling.” Which leads to the hard truth: Digital progress makes the economic pie bigger, but there is no law that states that everyone or even most people will benefit.

**The new grand challenge: Mind the gap**

Brynjolfsson closed his talk by challenging the attendees with three profound takeaways that will impact business and the economy as a whole:

- Digital technologies will continue to accelerate.
- Our skills, organizations and institutions are lagging.
- Business as usual won’t solve this problem.

He stressed that we need to speed up our adaptation of these digital technologies not only to help accelerate society but to ensure shared prosperity.

“Technology isn’t our destiny, we shape our destiny.”

Erik Brynjolfsson
Gartner analyst closing keynote summary

David A. Willis, Vice President and Distinguished Analyst

As David Willis kicked off the closing keynote, he made sure everyone knew the meaning of digital business and that new business designs are merging the virtual and physical worlds. He pointed out that there are enormous opportunities by instrumenting the physical world and cited the following statistics:

- The Internet of Things will enable 30 billion sensors to be installed by 2020.
- It will add $1.9 trillion in economic value-add, worldwide.
- It will introduce new markets, totaling $300 billion by 2020.

Also, Willis recited a phrase that was a theme throughout the week, which was: “Every business unit is a technology startup.” Essentially, the new startups exist in your own organization, and in order to get bimodal, you need to look to partner with business units or incubate your own digital startup.

To underscore some of the overall themes around the humanist and mechanistic viewpoints, Willis incorporated expert advice from a team of analysts on a host of topics:

**Putting people front and center — human-centered design**

“Digital leaders must remove clutter and complexity of today’s functionally bloated business software by adopting the app construct — not by how many things it does but by how it does one thing — the humanist way.”

**Brian Prentice, Vice President, Gartner Research, Asia/Pacific**

**Future of the digital workplace**

The digital workplace is here. Don’t ignore it, enable it! “Invest in digital etiquette on unsecure networks; take care of the security and get out of the way.”

**Jenny Sussin, Principal Analyst, Gartner Research, NA**

**People-centric security**

This type of security is based on real-time context that incorporates location, device reputation, user behavior, historical patterns, and time and date. “It’s big data analytics brought to information security.”

**Roberta J. Witty, Vice President, Gartner Research, NA**

**The future of infrastructure and operations**

“Digital business can only scale when there is a high scale of automation with high level of reliability to keep it running smoothly.”

**Henrique Cecci, Director, Gartner Research, LA**

**Hybrid cloud**

The cloud allows you to move from rock solid IT to a more fluid form of IT, enabling you to run your business and fuel your digital playground for business innovation. “In digital business the cloud is not just storage, the cloud is where you run your digital business — it’s a cloud of services.”

**Yefim V. Natis, Vice President and Gartner Fellow, Gartner Research, NA**

**Future of sourcing**

“Digital providers do not behave like today’s machinist megavendors.”

**Alexa Bona, Managing Vice President, Gartner Research, EMEA**

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Digital Humanist Manifesto:

- Put people at the center
- Embrace unpredictability
- Respect personal space
A special “thank you” to our sponsors

Thank you to our 290 sponsors, each of whom helped make Gartner Symposium/ITxpo 2014 a success. Their leading-edge solutions were displayed on the exhibit floor in 11 Marketplaces that aligned with this year’s role-based tracks. Special features included solution provider sessions and CIO Thought Leadership presentations by senior IT executives from top technology providers, each describing their strategic vision and relevance to the digital business future.

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Gartner Symposium/ITxpo by the numbers

- 8,000 total attendees
- 2,700 CIOs
- 1,120 Sym Club members
- 200 Gartner analysts
- 290 solution providers
- 3,729 organizations
- 500 sessions
- 6,300 Gartner analyst one-on-one meetings
- 6,500 people sent out more than 30,000 tweets
#GartnerSYM was one of the top 10 trending Twitter feeds

Snapshot of attendees

Top 5 job titles

- CIO: 38%
- VP: 12%
- Director: 25%
- Manager: 15%
- Architect: 3%

Top 5 industry sectors

- Government: 18%
- Manufacturing: 16%
- Services: 9%
- Technology & Telecom: 17%
- Banking, Finance & Insurance: 14%

Company size

- XXL: 32%
- XL: 10%
- L: 10%
- M: 9%
- S: 14%
- Government: 18%

For conference details, visit gartner.com/us/symposium
Your post-event resources

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From the rise of the “business moment” to the new wave of talent that makes a digital business thrive, our robust online library of digitally focused research, reports and news offers a fascinating look at digital business trends, forecasts and success stories.

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View sessions
Save the date for the 25th anniversary of Gartner Symposium/ITxpo in Orlando, October 4 – 8, 2015

Plan now to join us again next year! Registration is scheduled to open for the 2015 event in early December. All attendees will be notified in advance of registration opening. To bookmark the page, go to gartner.com/us/symposium.

2015 global CIO events

**Gartner CIO Leadership Forum:** March 1 – 3, Phoenix, AZ
**Gartner CIO Leadership Forum:** March 16 – 18, London, U.K.

**Gartner CIO & IT Executive Summit:** May 20 – 21, Munich, Germany
**Gartner CIO & IT Executive Summit:** September 8 – 10, Mexico City, Mexico

**Gartner Symposium/ITxpo:**
- May 19 – 21, Dubai, UAE
- September 28 – 30, Cape Town, South Africa
- October 4 – 8, Orlando, FL
- October 14 – 16, Tokyo, Japan
- October 19 – 22, São Paulo, Brazil
- October 26 – 29, Gold Coast, Australia
- November 2 – 5, Goa, India
- November 8 – 12, Barcelona, Spain

To view the complete list of 2015 Gartner events, visit gartner.com/events