



Debate Session VII

Driving true innovation with Cloud and Mobility: IoT, Big Data, Analytics, Security and more

Introduced and Chaired by: Casey L. Quillin

Director, Data Center Appliance and Storage Area Network Market Research





Debate Session VI – Driving true innovation with Cloud and Mobility:

IoT, Big Data, Analytics, Security and more

Casey L. Quillin – Chairperson
Director, Data Center Research
Dell'Oro Group



Eric Hutchinson, CEO, Spirent Communications

Eric was appointed to the Board in January 2000 as Chief Financial Officer and appointed Chief Executive Officer in September 2013. Before this appointment, Eric joined the Company in 1983 and worked in various roles in the finance function prior to his appointment as Chief Financial Officer. He is a Fellow of the Association of Chartered Certified Accountants and a member of the Financial Reporting Review Panel.

Hari Makkala, CIO, Delta Dental

Hari brings with him more than 23 years of information technology experience in the health care and finance industries. Prior to joining Delta Dental in 2009, he served as chief technology officer and senior vice president for People's United Financial, Inc., and held several IT leadership roles at CIGNA Corporation and positions at AETNA and GeoTrace Technologies. He holds a Master of Science degree in computer engineering from the University of Houston and a Bachelor of Engineering degree from Osmania University in India.



Paul McNamara, VP Strategy for Cloud, Ericsson

Paul McNamara is the Vice President of Corporate Strategy for Cloud Computing at Ericsson. Paul is a veteran of the computer industry having worked at leading technology companies like Red Hat, Salesforce.com, IBM, SGI, and Adobe. Prior to joining Ericsson, Paul was the VP of Platform Products for Salesforce.com's highly successful Force.com platform. Prior to Salesforce, Paul was the founder and CEO of the pioneering Platform-as-a-Service provider Coghead which was acquired by SAP in 2009.

Bob Metcalfe

Inventor of Ethernet, and today Professor of Innovation and Murchison Fellow of Free Enterprise at the University of Texas, Austin's Cockrell School of Engineering



The Cloud Changes...

- Who purchases data center network equipment.

Was users from thousands of different enterprise companies.

Dell'Oro Group expects that most enterprise users will seek to outsource their data centers.

The result of this shift in purchasers will be fewer users, possibly just a handful (i.e., Cloud SPs), buying equipment.



The Cloud as a Customer...

- Content Cloud

Large content providers, such as Google and Facebook, are equivalent to thousands of traditional customers in terms of quantity of equipment they purchase.

These large content providers purchase massive quantities of equipment, in some cases buying from switching vendors, in others building their own switches and leveraging merchant silicon.



The Cloud as a Customer...

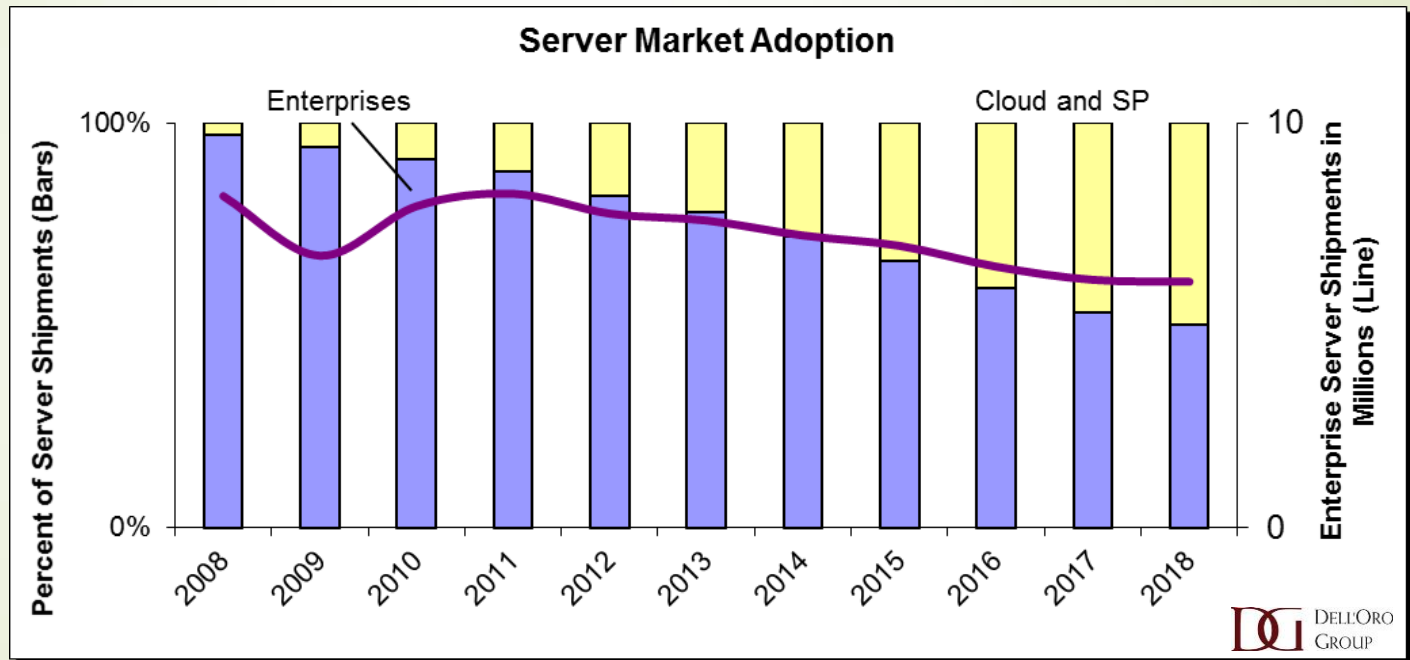
- Outsourced Cloud

Enterprises that are consolidating data centers and moving infrastructure to the hosted environment of the Cloud.

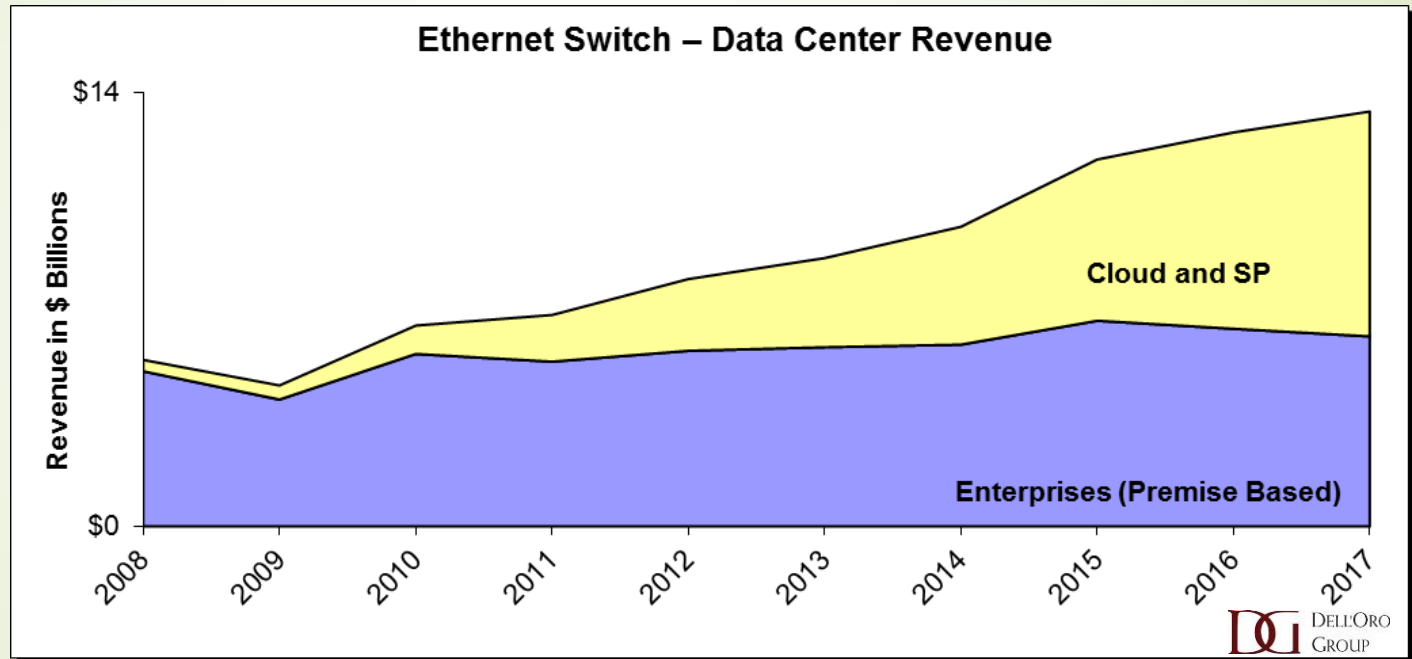
Migrations to the Cloud are reducing the numbers of both data centers and discrete purchasing decisions by IT end users.

Evidence of this can be seen in the decreasing number of servers shipped to the premises of enterprises

Cloud Market Impact – Servers



Cloud Market Impact – Ethernet Switch





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DELTA DENTAL®

Hari Makkala, CIO



ERICSSON

Paul McNamara, VP Strategy for Cloud



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Eric Hutchinson, CEO



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Bob Metcalfe, Inventor of Ethernet and Professor of Innovation and Murchinson Fellow of Free Enterprise