



INDSIGHTS

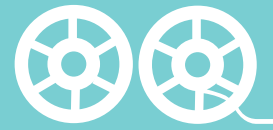
INFORMATION TECHNOLOGY

INDSIGHTS SIGNATURE INDUSTRY PRIMERS:
INFORMATION TECHNOLOGY
(A VISUAL GUIDE)



CONCEPT

- ▶ DEFINING INFORMATION TECHNOLOGY (IT)
- ▶ DEFINING INFORMATION TECHNOLOGY (IT) INDUSTRY



STORYLINE

- ▶ STORY SO FAR
- ▶ PRESENT STATE
 - ▶ Market Size
 - ▶ Top Tech Companies (Top 25)
 - ▶ Richest People In IT (Top 20)
- ▶ WAVES & ERAS



STRUCTURE

- ▶ VALUE CHAIN
 - ▶ Various Roles
 - ▶ Market Size & Major Players
- ▶ COMPETITION MAPS
 - ▶ The Tech Battlefield
 - ▶ High Level Positioning
 - ▶ Role Mapping
 - ▶ New Platform Wars
- ▶ CUSTOMER SEGMENTS
 - ▶ Verticals & Horizontals
 - ▶ Major Players
- ▶ S-CURVES
 - ▶ Technology Improvement
 - ▶ Market Adoption



SPATIAL

- ▶ GLOBAL POSITIONING
 - ▶ IT Hubs Around The World
 - ▶ Twin Hubs of Innovation & Entrepreneurship
 - ▶ Corporate HQs (Top 25 corporations)
 - ▶ R&D Labs (Top 10 corporations)
 - ▶ Production Facilities (Top 10 corporations)
 - ▶ CS Universities (Top 20)
- ▶ INTEGRATED FULFILLMENT
 - ▶ Software
 - ▶ Hardware
- ▶ WORLDWIDE IT TRADE



PARTICIPANTS

- ▶ KEY CORPORATIONS
- ▶ PERSONALITIES
 - ▶ Entrepreneurs & Leaders
 - ▶ Thought Leaders
 - ▶ Inventors

SELECTED REFERENCES

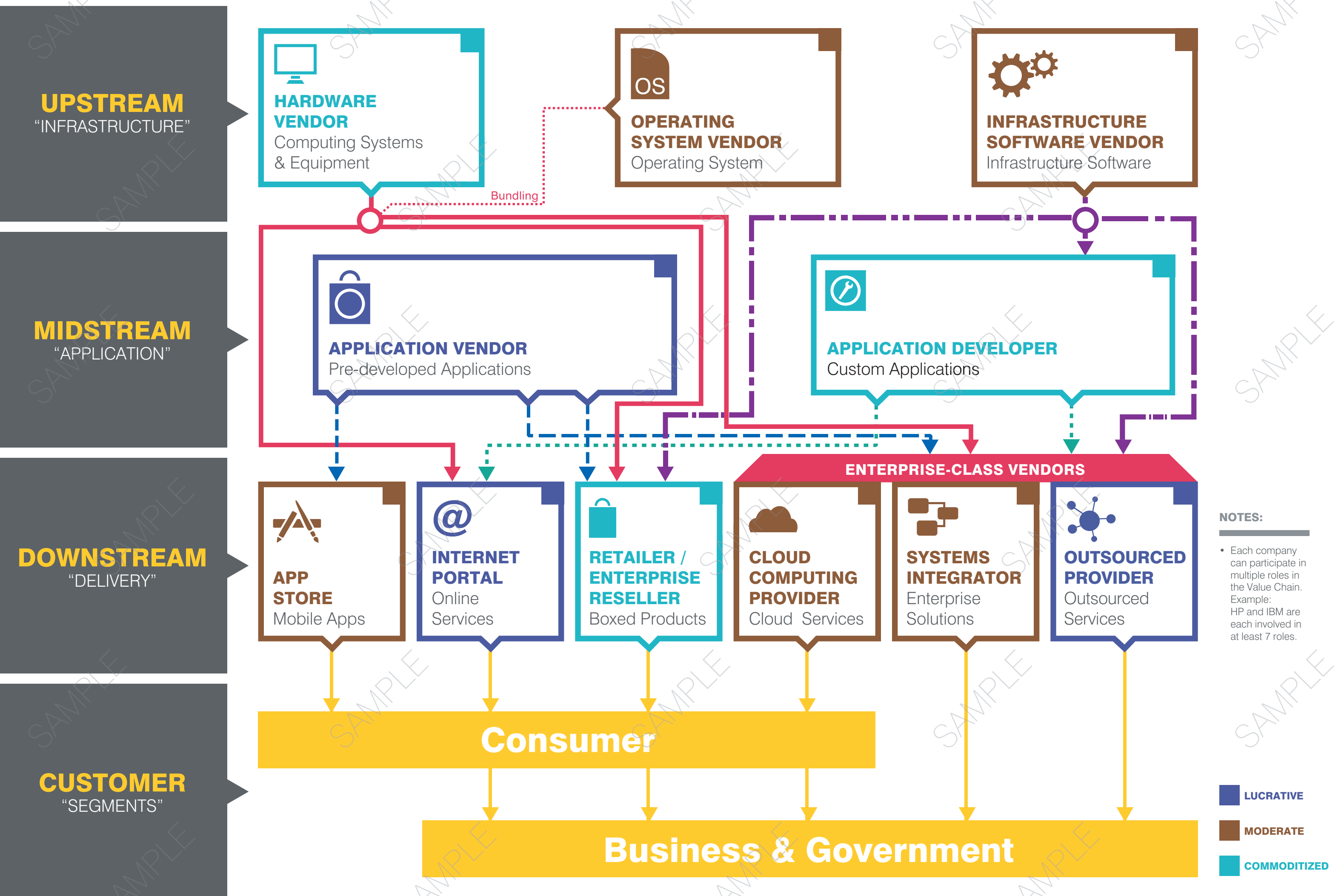
ADDITIONAL RESOURCES

COMMENTS / FEEDBACK

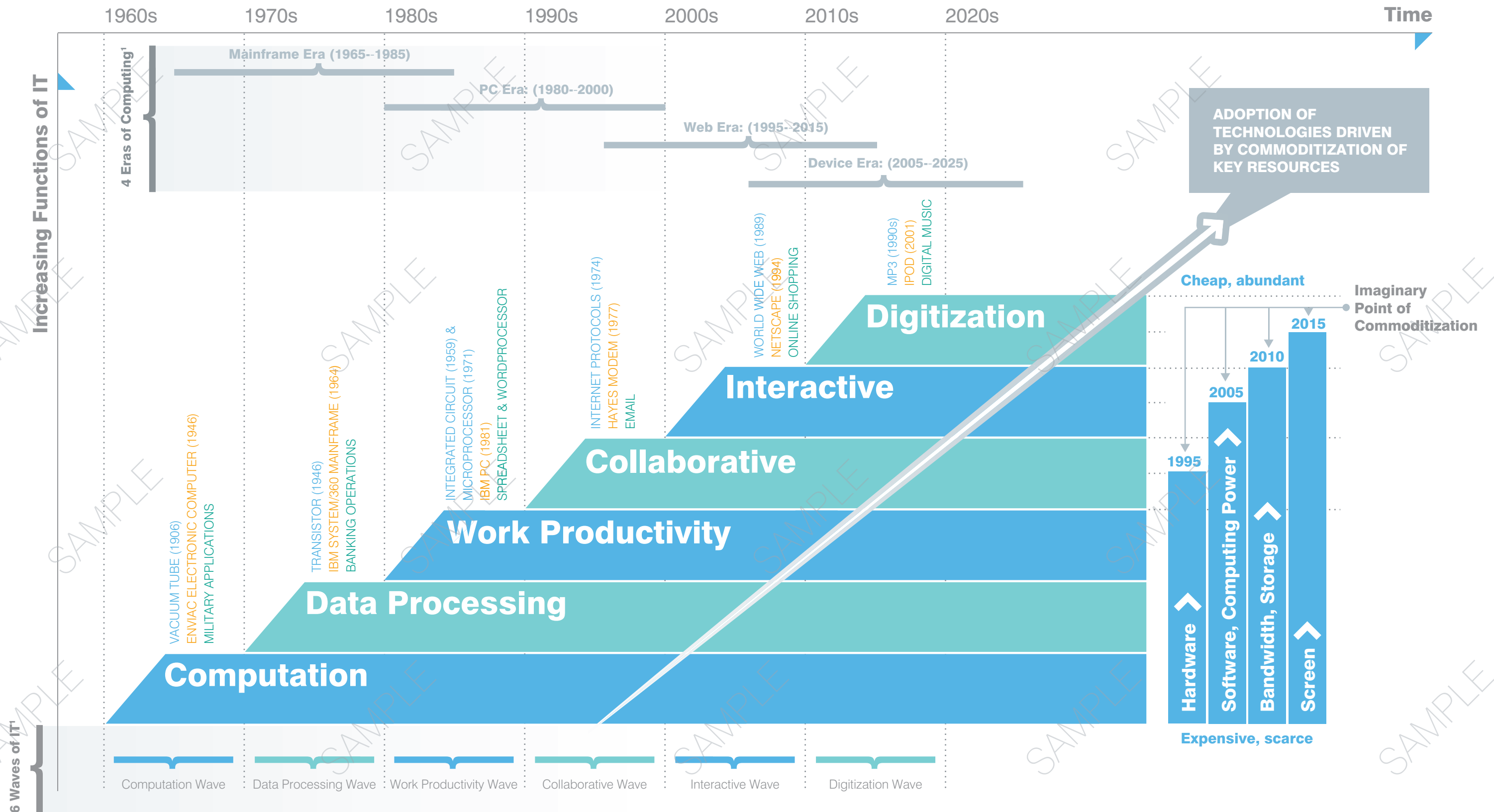
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VALUE CHAIN

- ▶ VARIOUS ROLES
- ▶ MARKET SIZE & MAJOR PLAYERS



WAVES & ERAS



Legend
 BREAK THROUGH INVENTION (YEAR)
 BREAK THROUGH PRODUCT (YEAR)
 EARLY KILLER APPLICATION

¹ = Adapted from Robert Grossman,
 The Structure of Digital Computing,
 Open Data Press LLC, 2012

— = Period of Critical Mass Adoption

S-CURVES

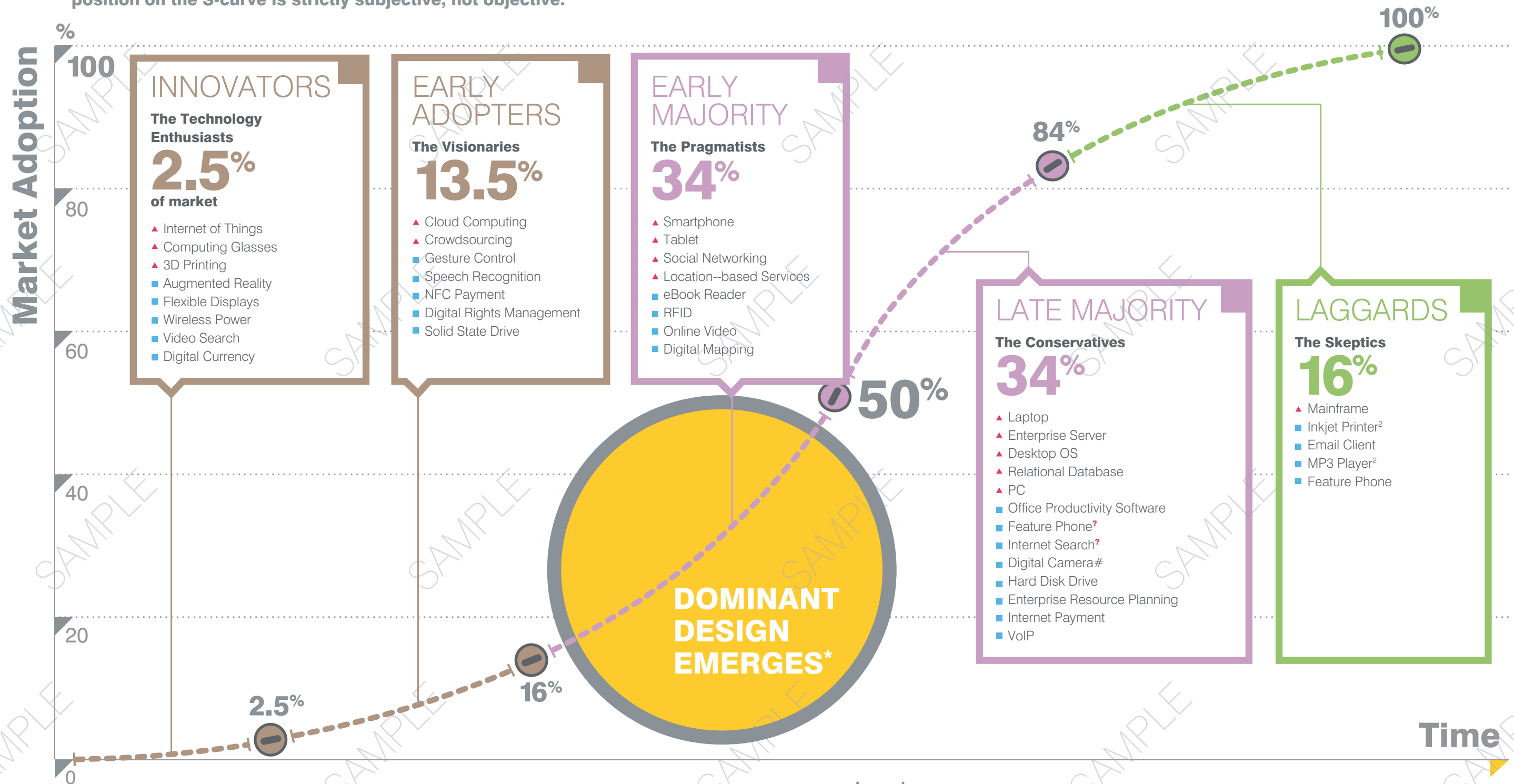
- ▶ TECHNOLOGY IMPROVEMENT
- ▶ MARKET ADOPTION

1

This is an adaptation of Geoffrey Moore's Technology Adoption Life Cycle (Crossing the Chasm). The cumulative S-curve version is used, instead of the more common Bell curve version. Based on anecdotal observations and not empirical analysis; hence, any technology's position on the S-curve is strictly subjective, not objective.

2

Referring to single-purpose technologies and products (e.g. inkjet printer, digital camera), rather than the convergence versions (all-in-one printer, smartphones)



“ A **Dominant Design** in a product class is, by definition, the one that wins the allegiance of the marketplace, the one that competitors and innovators must adhere to if they hope to command significant market following. ”

James Utterback,
Mastering the Dynamics of Innovation (1994)

INTEGRATED FULFILLMENT

- ▶ SOFTWARE
- ▶ HARDWARE

Silicon Valley, USA

Global HQ
Multiple Operational Sites
(Development Centers,
Data Centers, etc) in USA

Sao Paulo, Brazil

South America HQ & Data Centre

London, UK

R&D Lab
European HQ

Tel Aviv, Israel

R&D Lab

Singapore

South Asia / Australia HQ
& Data Centre

Hong Kong

North Asia / China HQ
& Data Centre

Manila, Philippines

Operations & Technical
Support Center

Dublin, Ireland

Software Development Center
European Data Center

Dubai, UAE

Middle East / Africa HQ

Bangalore, India

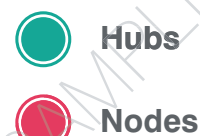
Software Development Center

Jakarta, Indonesia

Local Office

Beijing, China

R&D Lab



This scenario simulates the integrated fulfillment process of an Enterprise Software Vendor from conception to post-delivery support.

1

R&D INITIATIVES

Global HQ (Silicon Valley) manages the R&D efforts at its 3 international labs in Tel Aviv, London and Beijing.

2

PRODUCT DEVELOPMENT

Global HQ incorporates R&D innovations into new product. It designs the overall architecture and parcels out parts of the system to its Software Development Centers.

3

PRODUCT LAUNCH

The Product is announced at the Software Vendor's Annual Conference in Silicon Valley. It is then launched at separate Partner Events by the five Regional HQs. Internal marketing teams kick off B2B marketing and partner development efforts.

4

IMPLEMENTATION

For the new client in Jakarta, the implementation team is assembled from the Singapore HQ, solution partners and local office to work on client project. Further system customization support is provided remotely from Bangalore Development Center.

5

SYSTEM DEPLOYMENT

The customized system is deployed, tested and commissioned at the vendor's Data Center in Singapore. Once system goes "live", its management is transferred to the Philippines team.

6

TECHNICAL SUPPORT

The first line of technical support is provided by the 24x7 Local Support Center in Jakarta, who may visit the customer site. Unresolved problem is first escalated to the Operations & Technical Support Center in Philippines (which manages the system hosted in Singapore) and eventually to the Global Support in United States.

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