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Aligning R&D with industry change

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Global forecasting – A humbling history | **LEADINGedgeforum**



USSR 1950s/60s -- Centralized planning

Japan 1970s/80s -- Keiretsu

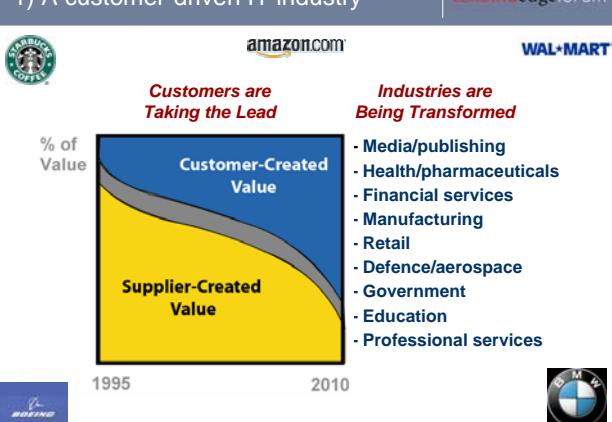
Europe 1990s -- Societal cooperation

China? 200X

India? 200X -- Scale/cost?

1) A customer-driven IT industry

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Customers are Taking the Lead

Supplier

Customer

Customer-Created Value

Supplier-Created Value

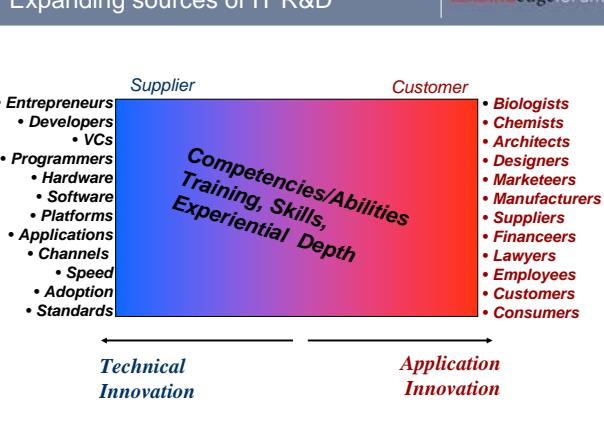
1995 2010

Industries are Being Transformed

- Media/publishing
- Health/pharmaceuticals
- Financial services
- Manufacturing
- Retail
- Defence/aerospace
- Government
- Education
- Professional services

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Expanding sources of IT R&D | **LEADINGedgeforum**



Supplier

Customer

Competencies/Abilities

Training, Skills, Experiential Depth

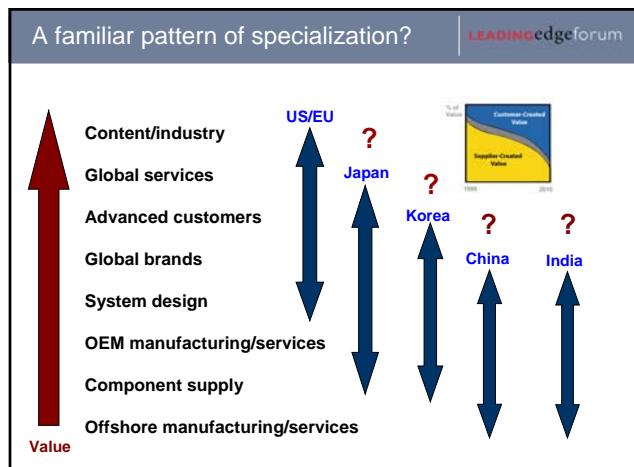
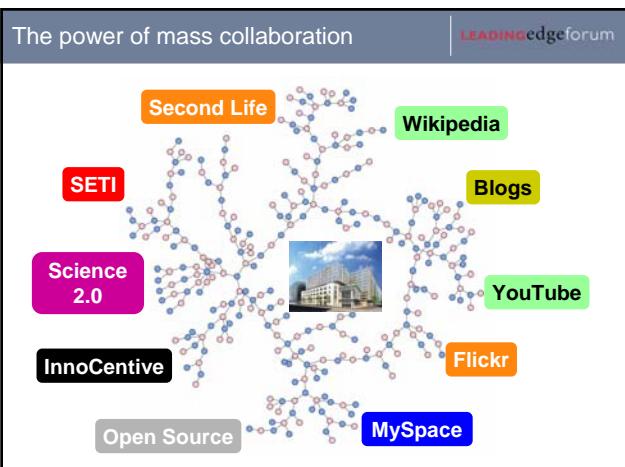
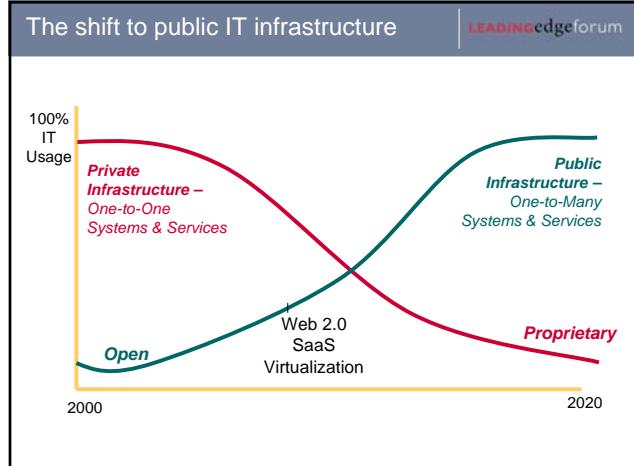
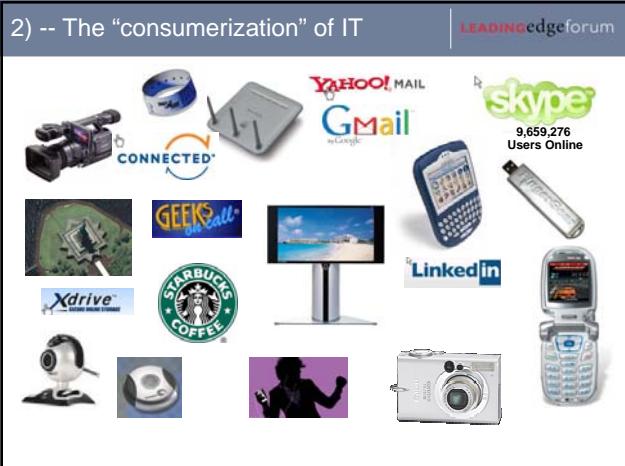
Technical Innovation

Application Innovation

- **Entrepreneurs**
 - Developers
 - VCs
- **Programmers**
 - Hardware
 - Software
 - Platforms
- **Applications**
 - Channels
 - Speed
 - Adoption
 - Standards

- **Biologists**
- **Chemists**
- **Architects**
- **Designers**
- **Marketeers**
- **Manufacturers**
- **Suppliers**
- **Financiers**
- **Lawyers**
- **Employees**
- **Customers**
- **Consumers**

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Policy implications

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Pro-growth macroeconomics – Education, health care, transferable benefits, fiscal discipline, savings, competitive taxation, etc.

IT specific --

- Be a demand leader – Standards, interoperability, RFID, GPS, security, authentication, biometrics, voting, etc.
- Enable change – Deregulation, interstate commerce, copyrights, patents, privacy, environment, SOX, global reciprocity
- Attract talent – Visas, green cards, immigration, brand
- Services R&D – logistics, speech, translation, semantic Web, etc

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Thank you!



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