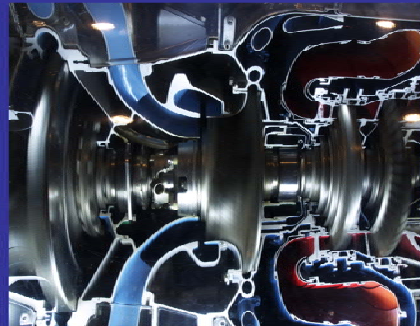


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The Crossroads: Global Trade & Technology

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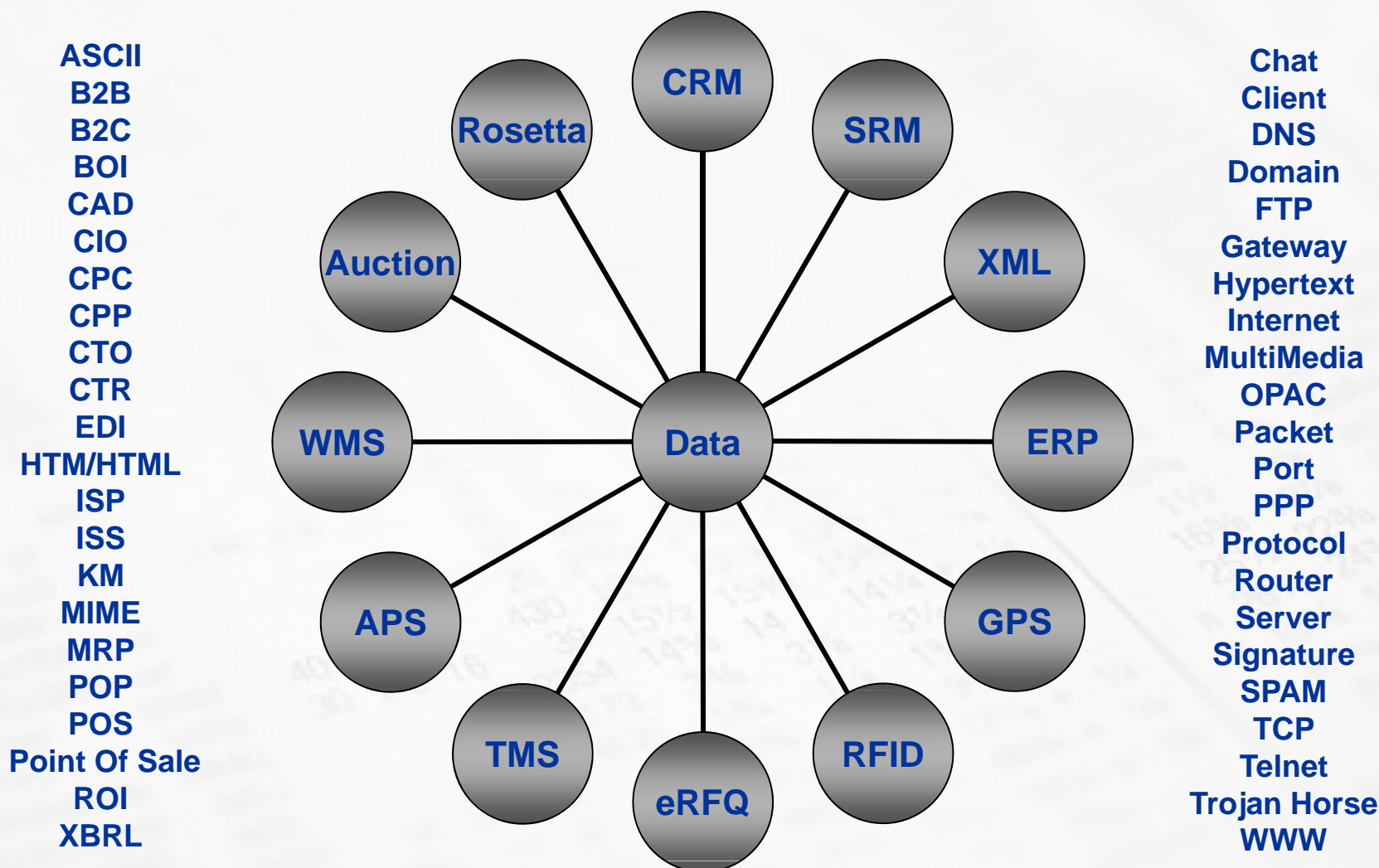
Agenda

- **Data Explosion**
- **Global Trade**
- **The IT Imperative**
- **What it Means for You**



Data Explosion

Explosion of IT Platforms and Concepts



Data changing our world

- Innovation from outside
- Collaborative selling
- Supply networks
- Standardized subassemblies

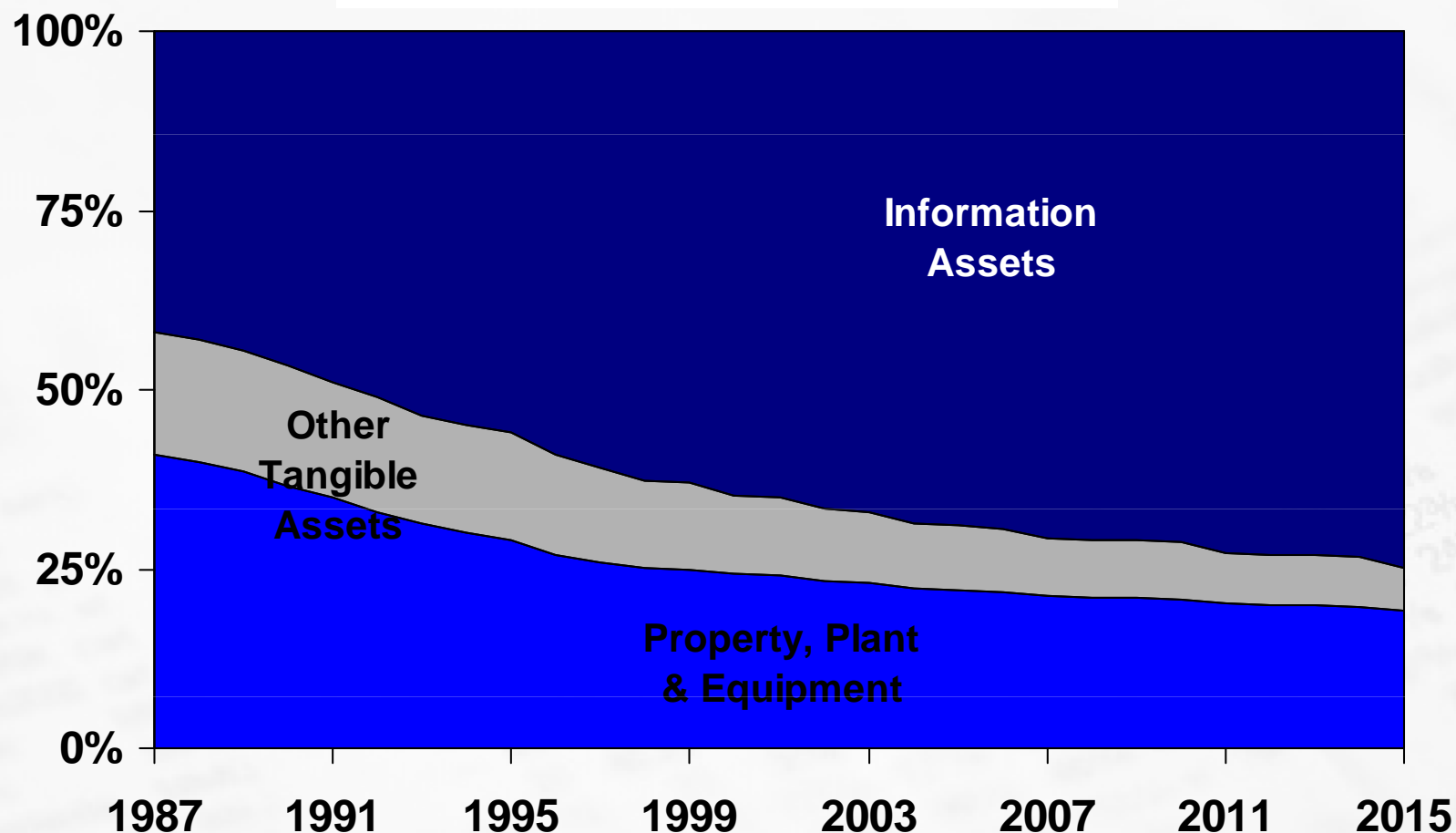
“We’re moving towards a world where operations are network-centric. There used to be vertical silos, [but in the future we’ll] have horizontal businesses that can integrate with each other.”

- Stephen Miles, MIT



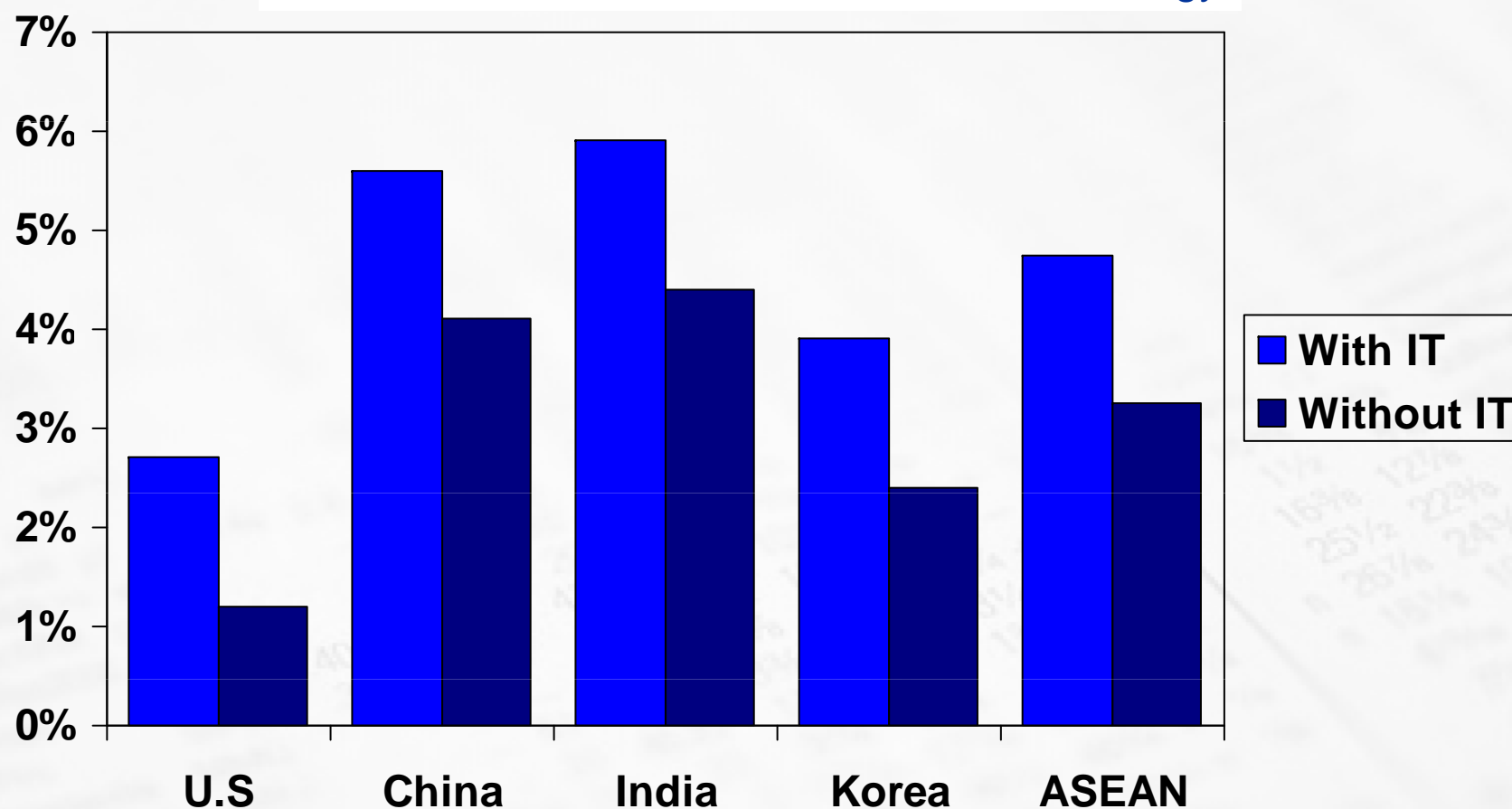
Information = value

Market Capitalization by Type of Asset



IT sustaining global economic growth

Growth With and Without Information Technology



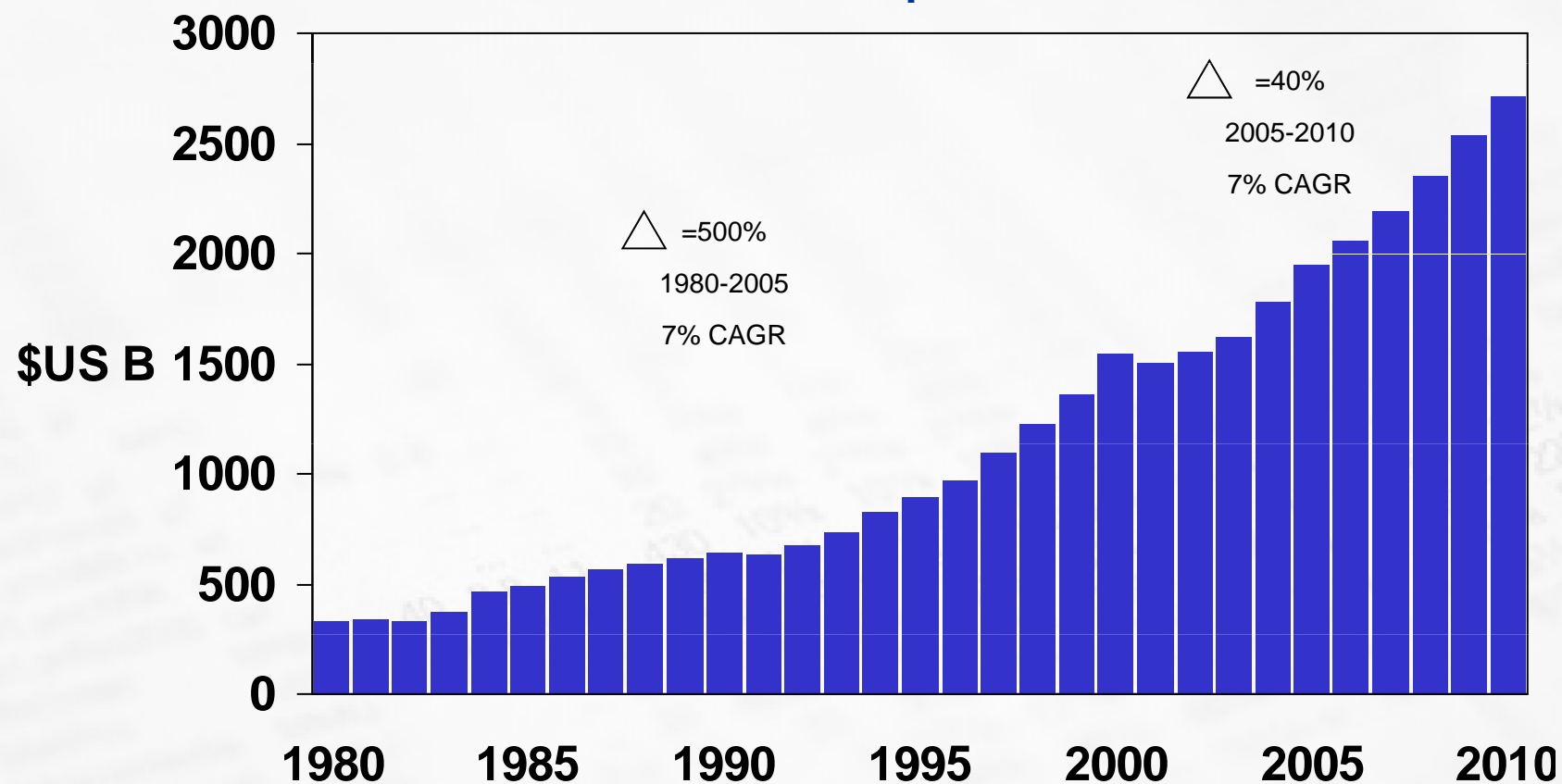
Source: Economist Intelligence Unit, Boston Strategies International



Global Trade

Asian Import Boom

U.S. Imports

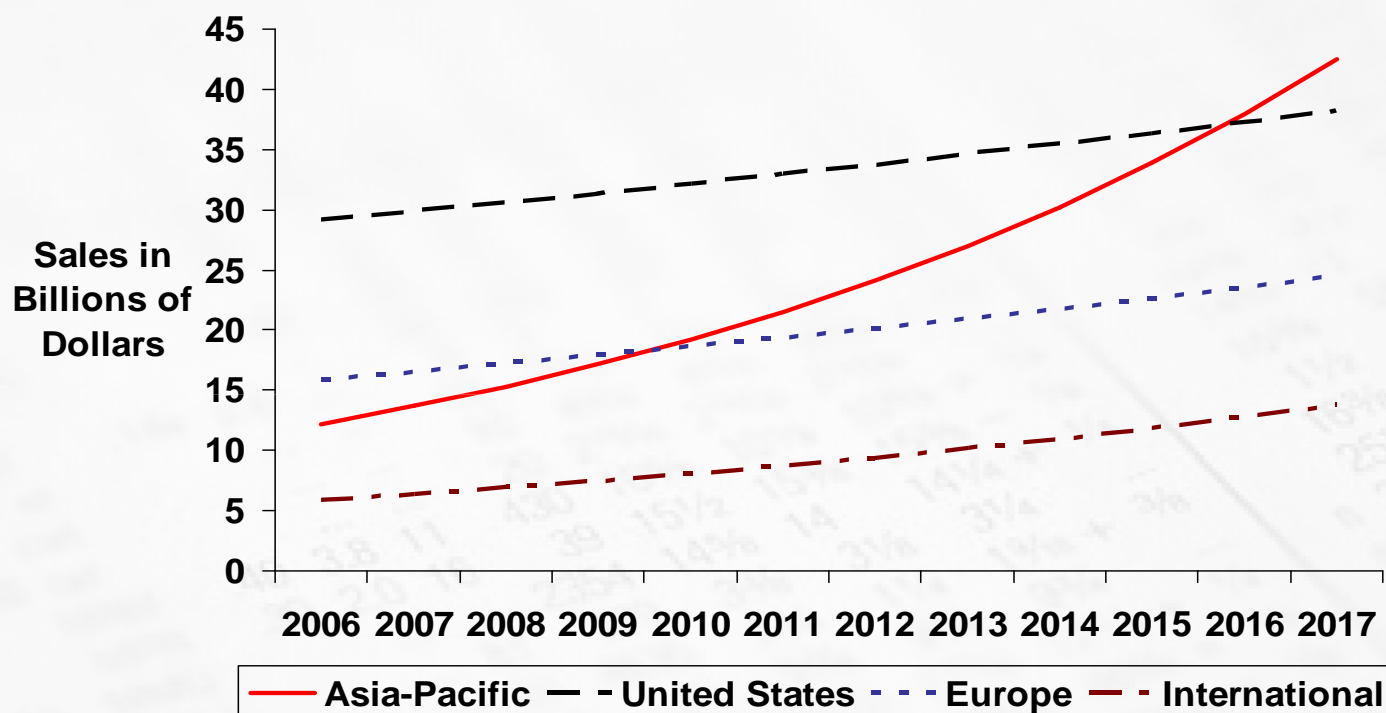


Sources: EIU WorldData



Asian Traffic Growth Compounding

Sales Forecast by Geographic Area



Assumes current growth rates

Source: HSBC, Datamonitor, Baird



The IT Imperative

To Handle Trade

- **Launching More New Products Faster**
 - Launching New Products More Frequently
 - Launching New Products Faster
- **Delivering Better Service**
 - Customizing product and service delivery
- **Increasing Margins: Rapid, Flexible Response**
 - Rapid Response
 - Postponement
 - Dynamic Pricing



To Reduce Cost of Long Supply Chains

- Lean manufacturing
- Lean inventory management
- Supplier partnering
- Cross-docking and fleet rationalization



What it Means for You

One-Time Opportunity

- **Investors**
 - Logistics sector
- **Manufacturers and service industries**
 - Asian sourcing and outsourcing
- **IT vendors: transportation=communication**
 - Mobile Solutions
 - Advanced IP Telephony
 - Communications Equipment
 - VPN Security
 - Fast Voice Technology
 - Interactive Voice Response
 - Call Center Hardware and Software
 - Converged Infrastructure
 - Intelligent System and Network Management



Plan Ahead, Profit from the Opportunity

- **Speed benefits**
 - Faster NPD cycle time
- **Scale benefits**
 - Bigger and bigger
- **Winner takes all**
 - Losers get bought or sold
- **Many mega-trends are in fact predictable long in advance (demographics, globalization), but most are slow to adapt. Be on top by thinking ahead.**



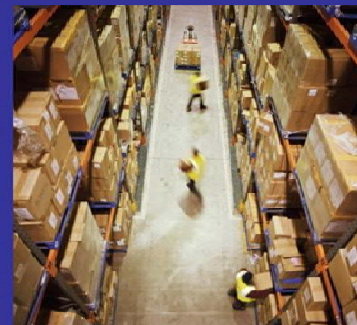
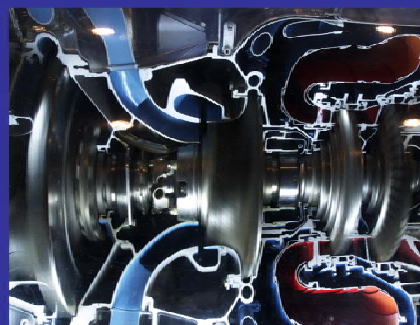
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Boston Strategies International is a global management consulting firm that helps market leaders achieve competitive advantage through supply chain management through:

- **Supply Market Analysis** that helps identify emerging issues that affect their supply chains
- **Supplier Enablement** that facilitates global growth and local content requirements
- **Supply Chain Optimization** that reduces project and life cycle costs



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