Course Overview
The information technology sector to date has often meant new products or services that settle into a market order, followed by realignments during technology migrations (say, 3G to 4G) or disruptive new entrants (Apple dislodging Motorola and Nokia). More recently the IT sector has blurred such that historic buyers of IT may also be providers or integrators of IT (e.g. GE). This has impacted the competitive landscape: IBM may be a partner to Microsoft, but it also competes with Microsoft; Netflix relies on Amazon Web Services for its infrastructure but also competes with Amazon Video in the marketplace. In this course we will explore these patterns by looking at examples provided by enterprises, device makers, infrastructure and network providers. Examples include Nokia, Netflix, GE, and AT&T. We will use a combination of case materials, current readings, and investor relations material to look at:

- business models: free, freemium, XaaS, more
- market disruptions and competitive response
- competition and coopetition
- the role and relationship of platforms; and
- the challenge to provide enduring value in an environment of rapid change.

Teaching Method
This course will leverage Harvard Business School case materials; current story topics to supplement each week’s discussion; Information Rules (Shapiro and Varian); and company investor relations materials. Active class participation is an absolute requirement.

Prerequisites
Students in this course will read and interpret investor relations material, MBA cases and articles and readings in industry media. Thus, familiarity with cost accounting and microeconomic concepts (e.g. network effects, lock-in) will be helpful.

Grading
50% class attendance and participation; 25% individual papers of 3 pages in length (3 over the course of the semester); 25% final group presentation in which the team will provide a recommendation to a company’s board of directors.

About the Instructor
Jon Metzler is a Lecturer at the Haas School of Business and lectures on telecom and media and international business in the MBA program. He has lectured at Haas since 2014. Jon consults to telecom carriers, device makers, infrastructure providers and media companies. He also has new venture creation experience in print, events, wireless location, edtech, wireless broadband, online media and more. Jon is a Haas MBA/MA-Asian Studies alum and during his time at Haas co-founded the Berkeley Asia Business Conference. Jon can be reached at jon dot metzler at berkeley dot edu.