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, from 3G to 4G) or disruptive new entrants (Apple dislodging Motorola and Nokia). More recently the 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.

Networks and devices need content; content needs devices and networks. In this class we will also look at content distribution and the blur between content providers and network providers (e.g. Comcast buying NBCUniversal); the mobile app economy; customer acquisition and virality.

This class will use a combination of strategy frameworks; microeconomic concepts (network effects, platforms, content production and distribution costs); marketing concepts (customer acquisition and segmentation; LTV) and business models (XaaS, free, freemium, etc). We will also look at “moonshots” as a means of solving large problems.

Teaching Method
This course will leverage case materials; current articles; our core text Information Rules (Shapiro and Varian); investor relations materials; selections from Idea Factory and other readings; podcasts and videos as relevant. Active participation is required.

Prerequisites
Students in this course will read and interpret investor relations material, MBA cases and articles and readings in industry media. Familiarity with cost accounting, microeconomic concepts, marketing concepts and strategy frameworks will be helpful. Students must be third-year and above.

Grading
50% class attendance and participation; 30% individual papers of 3 pages in length (3 over the course of the semester); 20% final group presentation.

About the Instructor
Jon Metzler is a Lecturer at the Haas School of Business and lectures on IT Strategy and Japan in the undergrad and EWMBBA programs. He has lectured at Haas since 2014. Jon consults to telecom carriers, device makers, infrastructure providers and media companies. He also has startup 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.