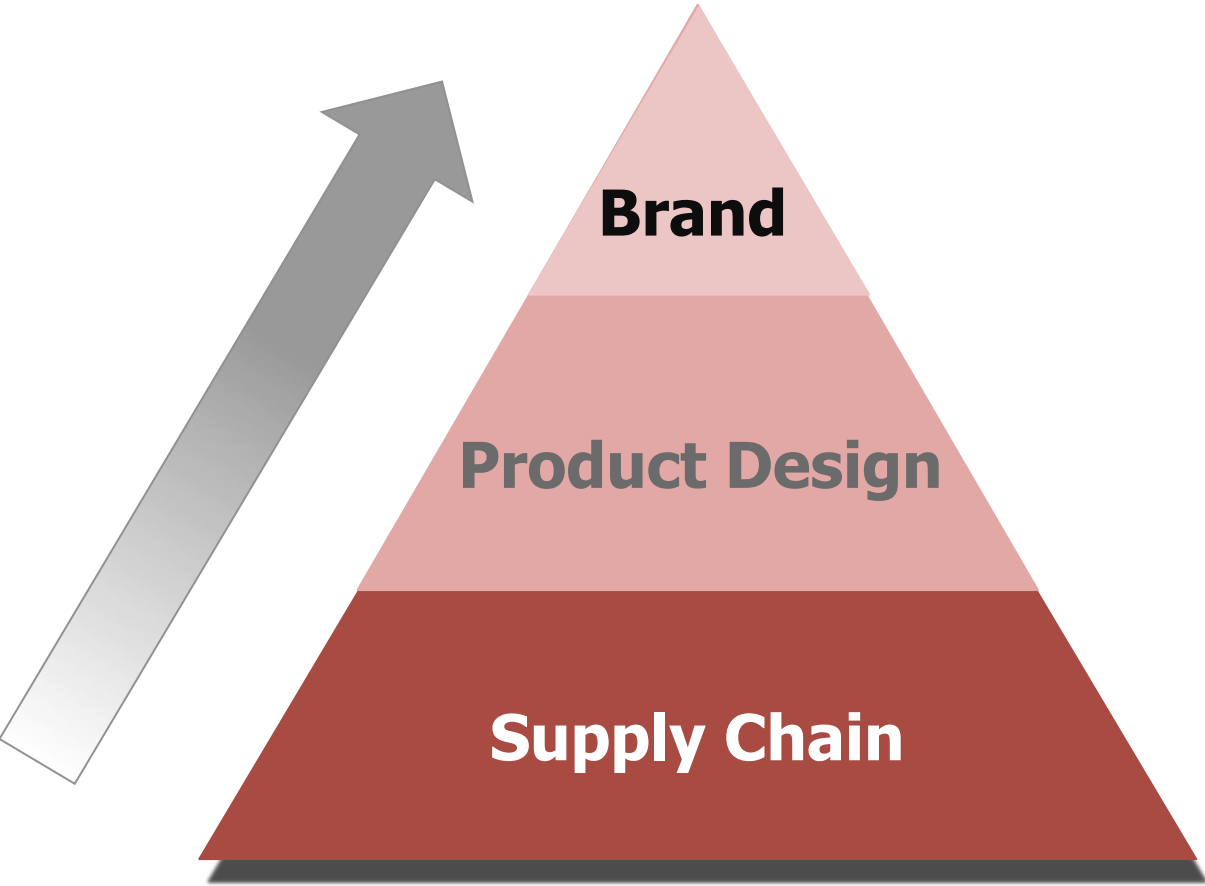


Macro trends in the technology industry

- **Global economic crisis – no industry immune**
- **Industry approaching a “mature” phase**
- **Globalization of supply chain, design and brand**
- **Convergence toward bundled products and services**

Country/Region evolution in high technology industry



High Tech supply chain trends

- **Increased capability in Asia**
- **Leadership in outsourcing by Asian firms**
- **Emergence of global competition**
- **Shifting centers of production**

High Tech product design trends

- **Outsourced design capabilities increasing**
- **Influence of Asia design “themes”**
- **Design for local market increasingly important**
- **Opportunities in emerging sectors for leadership**

High Tech brand trends

- **Move from “national champions” to global market**
- **Asian based firms increase global investments**
- **Cross border mergers for brand/market access**

What's in the future ??

- **Economic crisis / tensions**
- **Shifting political dynamics**
- **“Integrity” issues in the region**
- **Race for leadership in new sectors**
- **Continued growth and greater influence in the region ...**
- **... with others willing to compete**