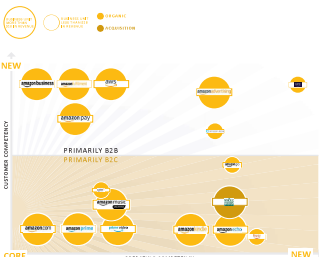


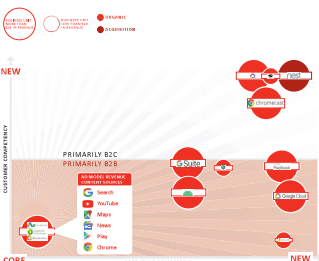
**Over time,** Amazon, Google & Microsoft have diversified products and business models, jumping “swim lanes” and introducing new competitive dynamics

**Amazon** exploited its eCommerce core — adding retail-related services & assets, own-brand consumer electronics, and delivery — and expanded to B2B IaaS/PaaS, media content development, and AI-voice services



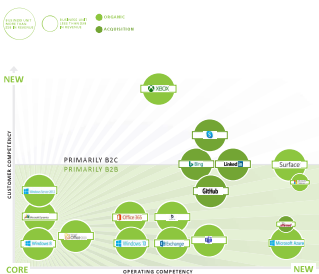
Revenue and Business Unit estimates based on insight assumed from public sources, such as

**Google** lane jumped from advertising-supported consumer content to cloud IaaS/PaaS business services, SaaS productivity tools, mobile and PC devices, and gaming & AR/MR platforms



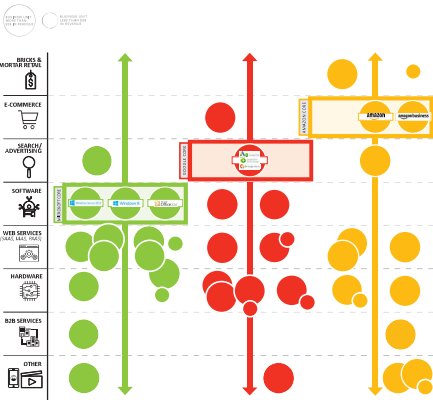
Revenue and Business Unit estimates based on available company and analyst reports, company reports, and analyst reports.

**Microsoft** transformed its licensed software legacy to SaaS, PaaS & IaaS businesses, adding organic and acquired Microsoft-branded business & consumer electronics solutions built on/with Microsoft architecture



Revenue and business LTV estimates based on insight sourced from public sources, such as company websites, analyst reports, and other available public information.

**Each company** has moved well afield of its core, in obvious and non-obvious directions



Source: Kaiser Associates Research and Analysis

## So What?

## Lane-jumping creates non-ordinary competitive dynamics

- Cross-lane margin subsidy
- Solution vs. component selling
- Operational efficiency from vertical integration

Email [TMT@kaiserassociates.com](mailto:TMT@kaiserassociates.com) for a related Jumping Lanes article published in Forbes.com

## Who Should Care?

- Amazon, Google, and Microsoft (AGM) — vis-a-vis each other
- SaaS vendors — Customer Relationship Management (CRM) Collaboration, UCaaS, other
- Cloud platform providers other than AGM
- Business/consumer electronics

Kaiser Associates works with leading providers of software, hardware, infrastructure, and cloud platform and application services to grow revenue and share from the network core to the edge

Key topics that global stakeholders should consider include:

**WHERE TO PLAY:**

- Market opportunity assessment
- Needs-gap analysis

#### HOW TO WIN:

- Competitive intelligence and benchmarking

- Business models and monetization strategies
- Go-to-market strategies

- Channel and partner analyses
- Operationalizing IoT/edge

Resources and Systems

## Considerations

