

# Gerhard Greiner

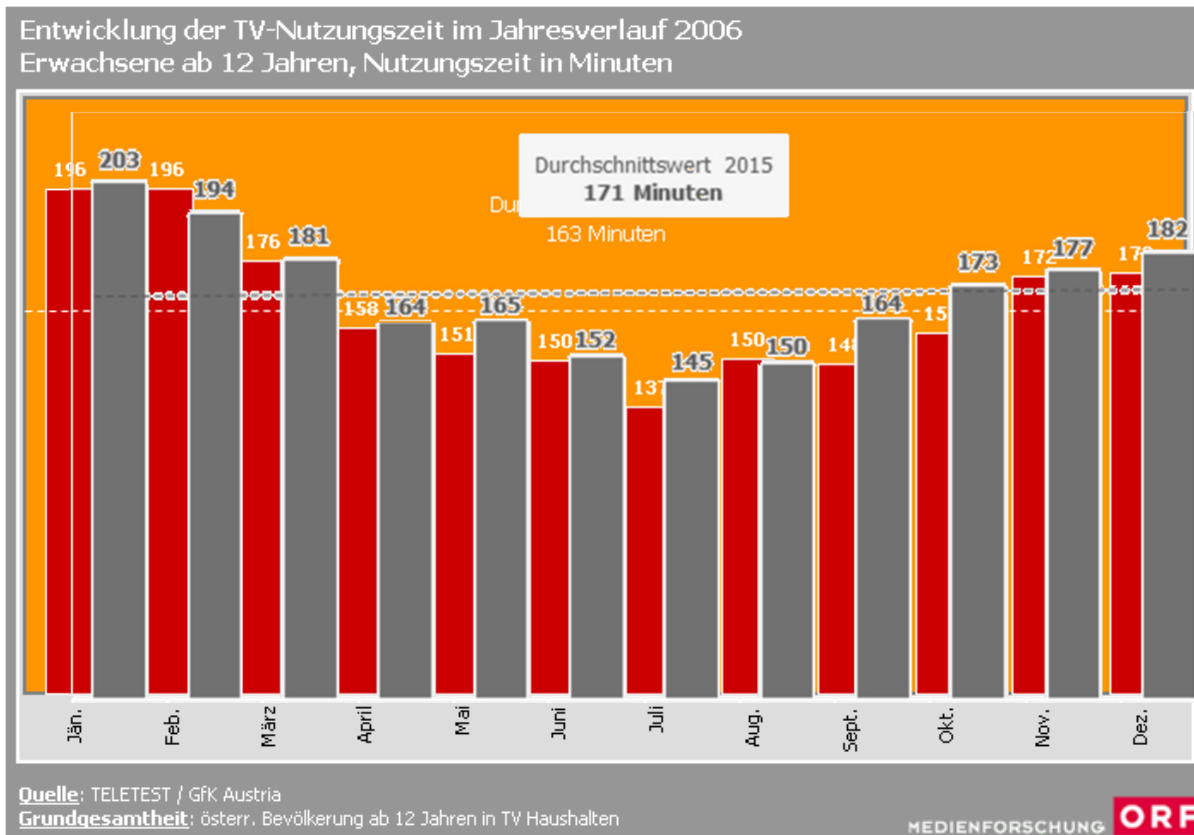
Impulsreferat zur Podiums-Diskussion:  
Die Zukunft der unbegrenzten Möglichkeiten -  
Anbieter im Spannungsfeld von  
Regulierung, globalen Plattformen und Start-ups



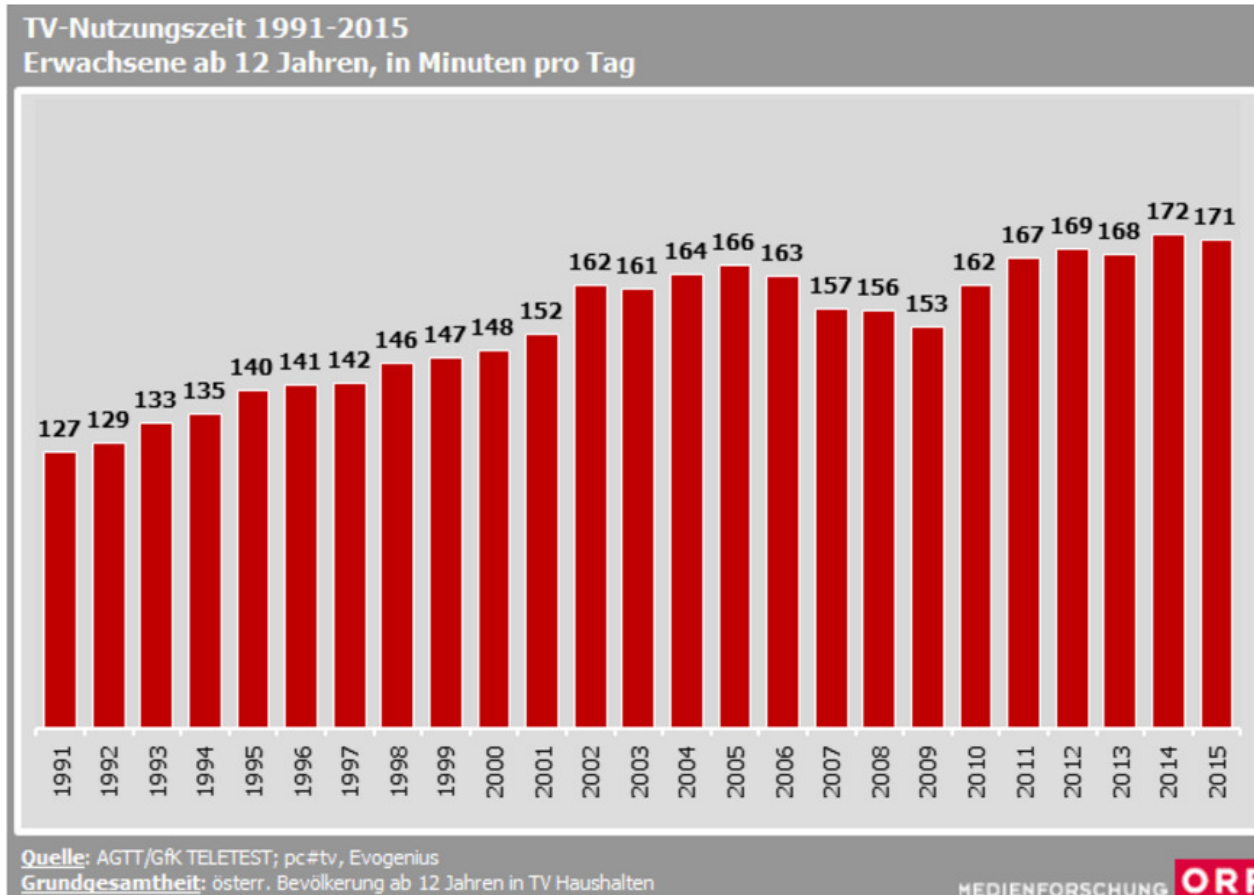
**Die Zukunft der unbegrenzten  
Möglichkeiten – Anbieter im  
Spannungsfeld zwischen**

- **Regulierung,**
- **globalen Plattformen und**
- **Start-ups**

# TV Nutzung/Tag übers Jahr (in 2006/2016)



# TV Nutzung/Tag Entwicklung 1991-2015





Konferenz für Kabel-TV & Breitband





Konferenz für Kabel-TV & Breitband





# Datenvolumina Europa 2014



Rank	Upstream		Downstream		Aggregate	
	Application	Share	Application	Share	Application	Share
1	BitTorrent	21.08%	YouTube	24.44%	YouTube	21.16%
2	HTTP	12.53%	HTTP	15.39%	HTTP	14.94%
3	YouTube	7.51%	Facebook	7.56%	BitTorrent	8.44%
4	SSL - OTHER	7.43%	BitTorrent	6.07%	Facebook	7.39%
5	Facebook	6.49%	SSL - OTHER	5.51%	SSL - OTHER	5.81%
6	Skype	4.78%	Netflix	4.82%	Netflix	4.18%
7	eDonkey	3.67%	MPEG - OTHER	3.82%	MPEG - OTHER	3.51%
8	MPEG - OTHER	1.89%	iTunes	2.24%	iTunes	2.03%
9	Apple iMessage	1.70%	Flash Video	1.85%	Skype	1.78%
10	Dropbox	1.44%	Twitch	1.65%	Flash Video	1.59%
		68.54%		73.35%		70.84%



Table 1 - Top 10 Peak Period Applications - Europe, Fixed Access

Quelle: <https://www.sandvine.com/>





# Datenvolumina USA 2014



Upstream		Downstream		Aggregate	
BitTorrent	18.37%	Netflix	35.15%	Netflix	32.72%
YouTube	13.13%	YouTube	17.53%	YouTube	17.31%
Netflix	10.33%	Amazon Video	4.26%	HTTP - OTHER	4.14%
SSL - OTHER	8.55%	HTTP - OTHER	4.19%	Amazon Video	3.96%
Google Cloud	6.98%	iTunes	2.91%	SSL - OTHER	3.12%
iCloud	5.98%	Hulu	2.68%	BitTorrent	2.85%
HTTP - OTHER	3.70%	SSL - OTHER	2.53%	iTunes	2.67%
Facebook	3.04%	Xbox One Games Download	2.18%	Hulu	2.47%
FaceTime	2.50%	Facebook	1.89%	Xbox One Games Download	2.15%
Skype	1.75%	BitTorrent	1.73%	Facebook	2.01%
	69.32%		74.33%		72.72%



Table 1 - Top 10 Peak Period Applications - North America, Fixed Access

Quelle: <https://www.sandvine.com/>

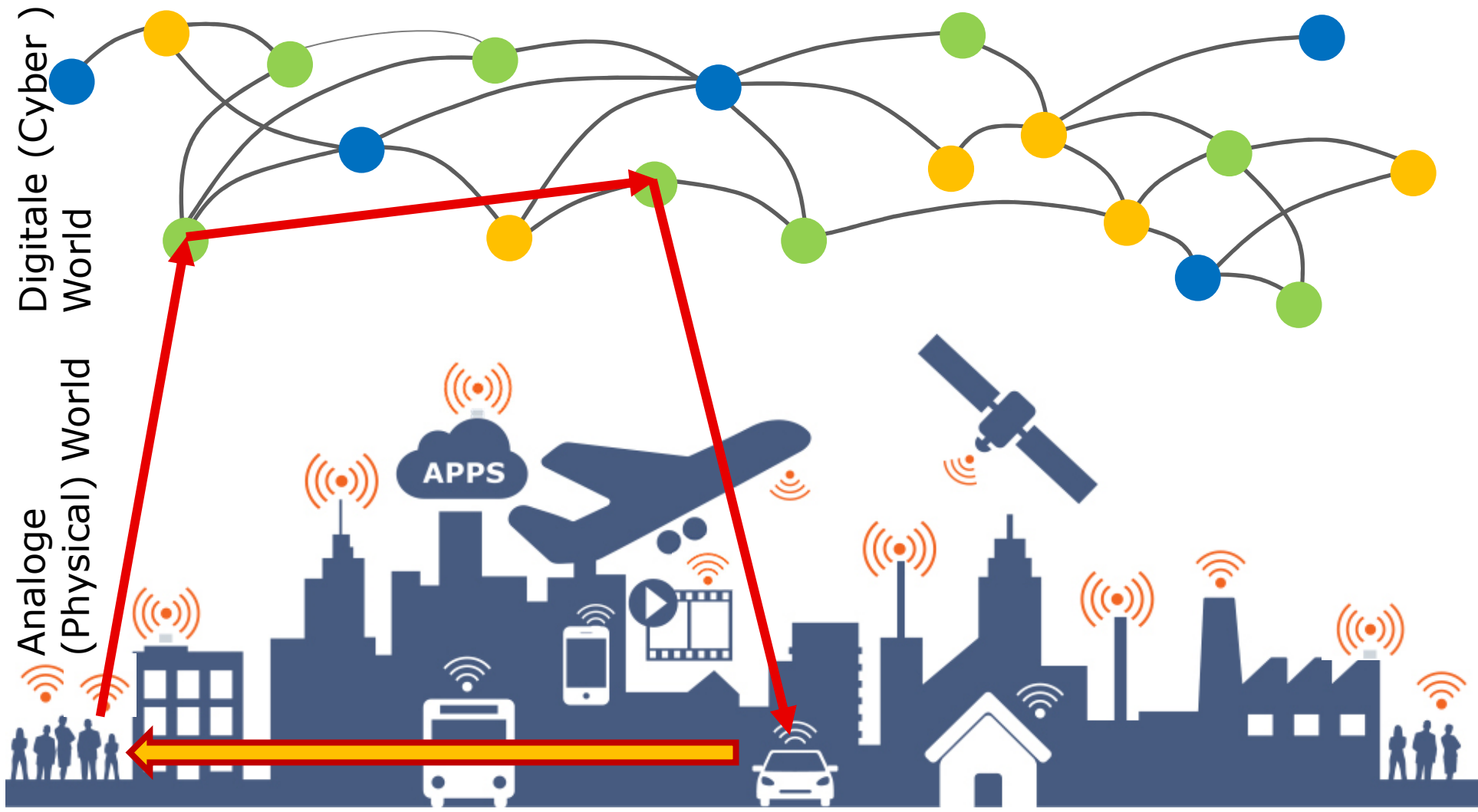


„being digital“  
ein non-fiction  
Buch aus 1995



[http://de.wikipedia.org/wiki/Nicholas\\_Negroponte](http://de.wikipedia.org/wiki/Nicholas_Negroponte)







# Anzahl der Connected Devices (USA 2015)

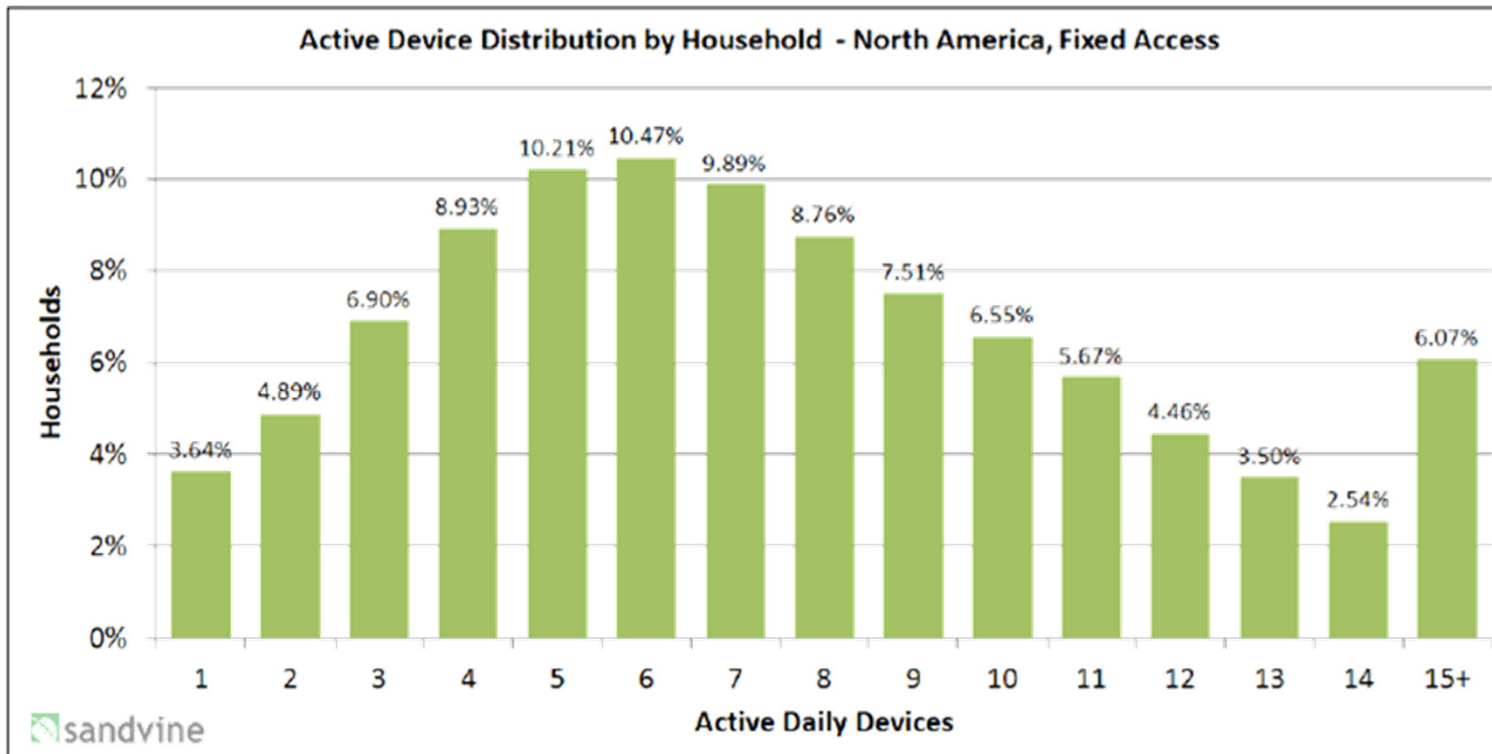


Figure 1 - Active Device Distribution by Household - North America, Fixed Access

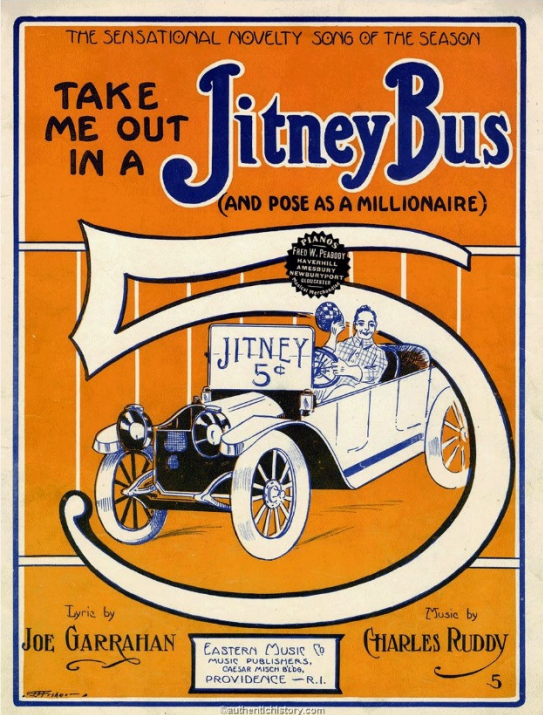
Quelle: <https://www.sandvine.com/>

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# Disruption und Regulierung

Am Beispiel Uber, Regulierung Jitney Bus um 1915

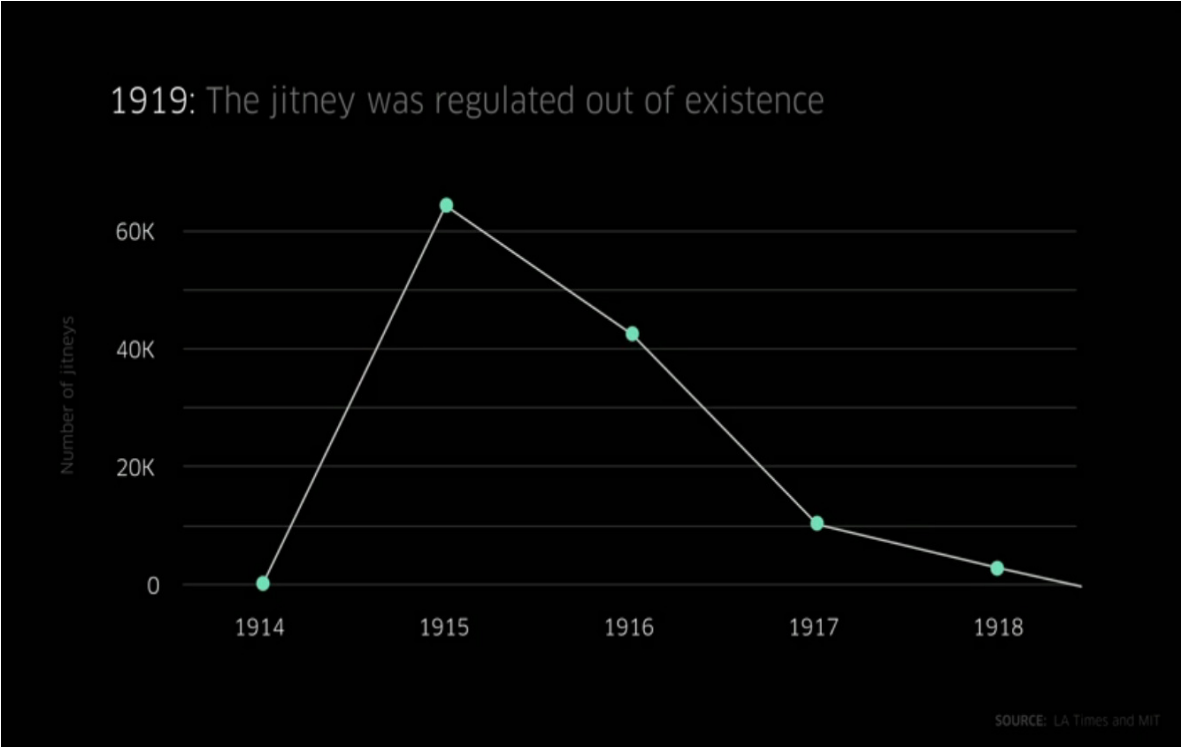
# Shared Economy: Regulation, Plattformen und Start-ups



Travis Kalanick (Uber) @TED2016 in Vancouver

<http://www.theglobeandmail.com/news/british-columbia/uber-founder-decries-regulation-at-ted-conference/article28781165/>

# Shared Economy: Regulation, Plattformen und Start-ups



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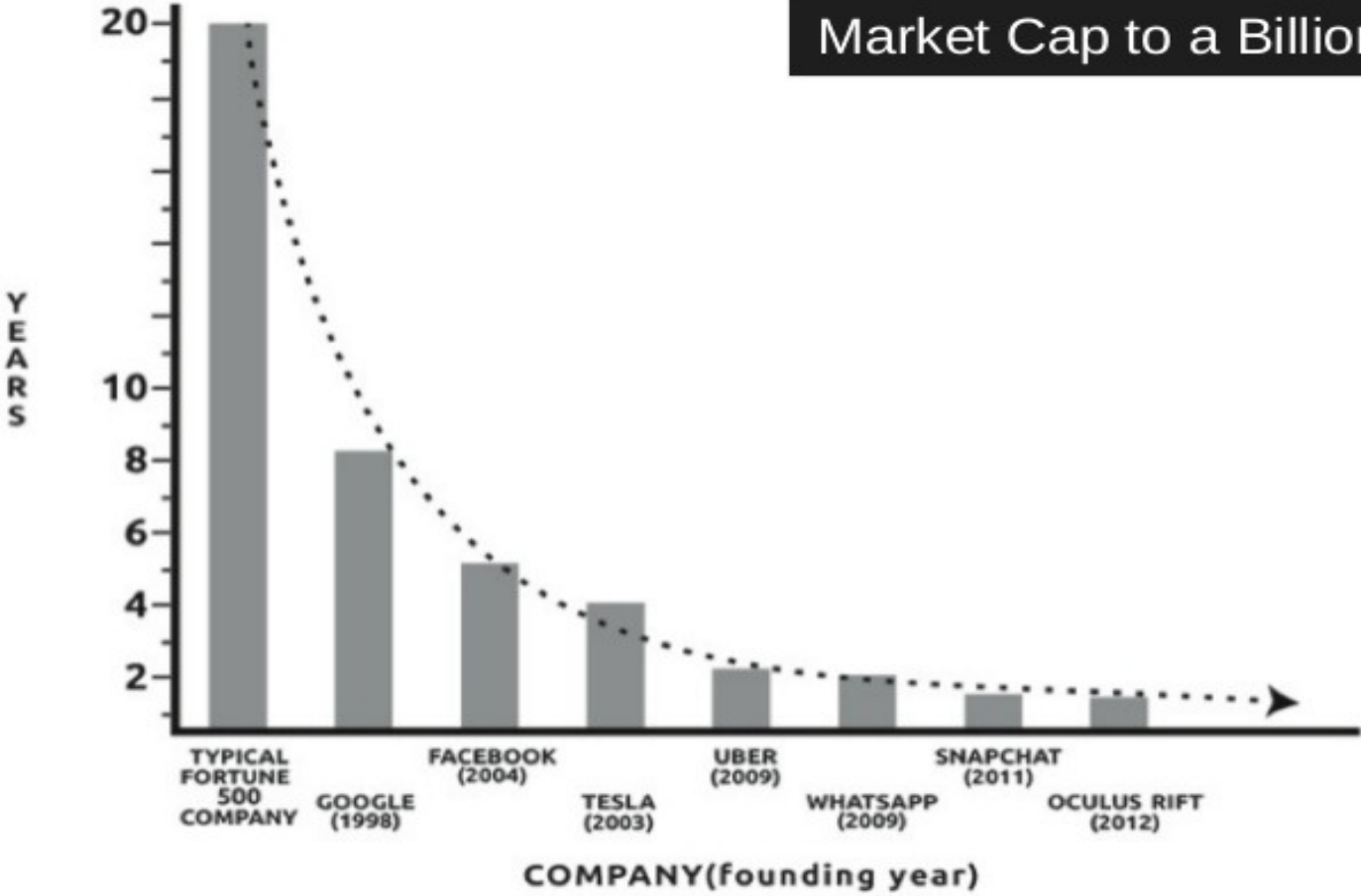


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# Start-ups

Der schnelle Weg zum Unichorn (Start-up mit 1 Billion/=Milliarde  
US\$ Kapitalisierung)

# Market Cap to a Billion



Quelle: Exponential Organizations: Why new organizations are ten times better, faster, and cheaper than yours; Salim Ismail et.al.



# THE LARGEST COMPANIES BY MARKET CAP

The oil barons have been replaced by the whiz kids of Silicon Valley



Top 5 Publicly Traded Companies (by Market Cap)

■ Tech ■ Other

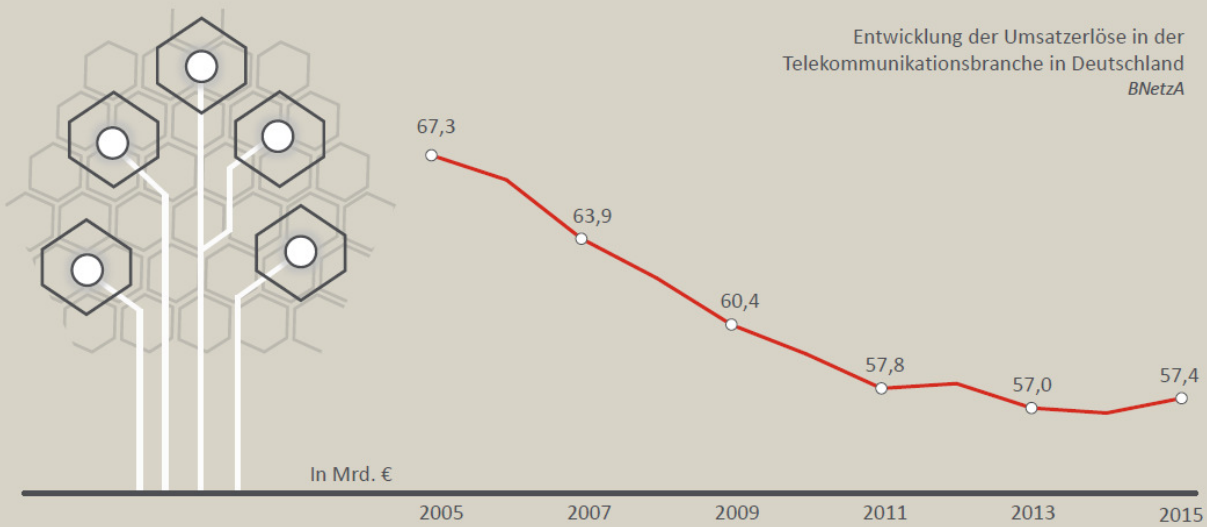


<http://www.visualcapitalist.com/chart-largest-companies-market-cap-15-years/>

visualcapitalist.com



# Nullwachstum in der Telkobranche



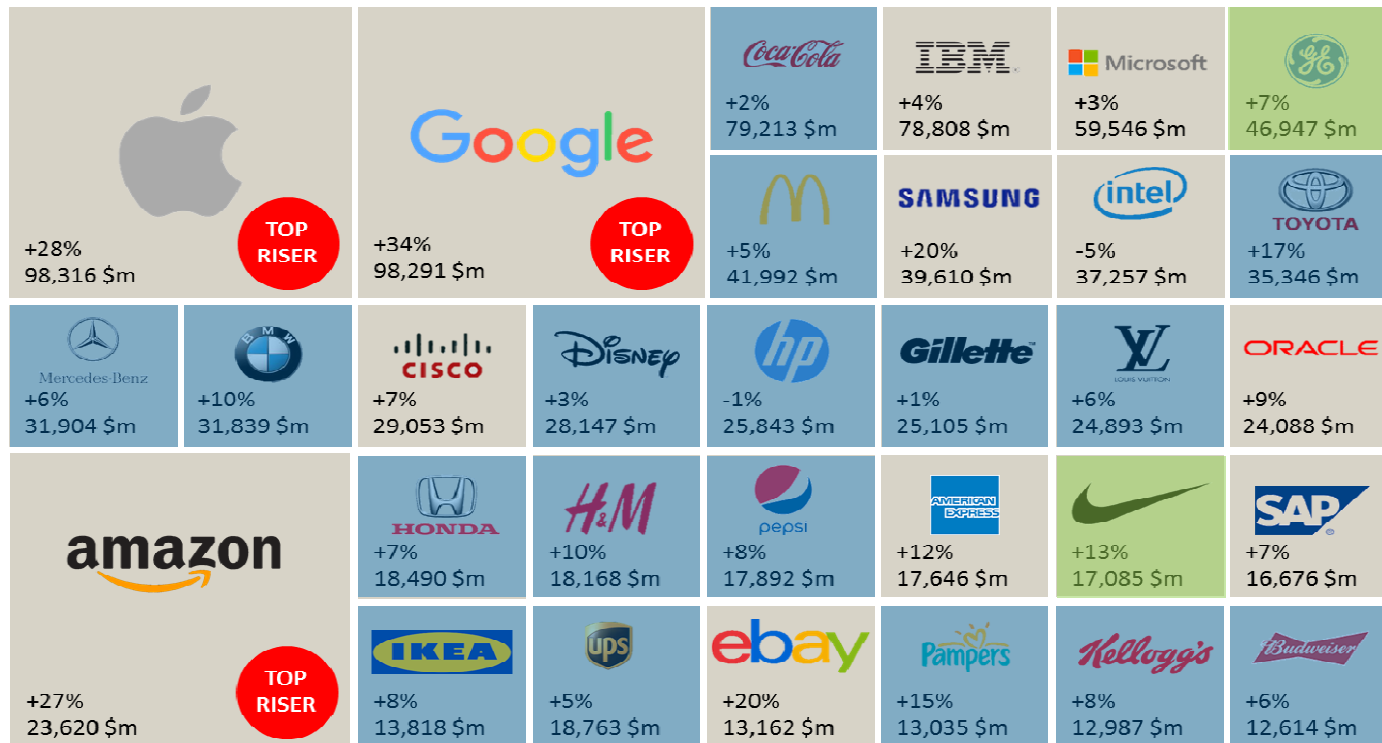
BearingPoint.

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# Plattformen

Das Geschäftsmodell der Start-ups und der Zukunft

# 40% der weltgrößten Top 30 Brands betreiben Digitale Ecosysteme (Wertschöpfungsketten)



**Digital Ecosystem Business**

**Aktuelle Marktkapitalisierung 4 Trillionen US\$**

**+ 70% der \$1bn+ Unicorns haben ein Geschäftsmodell basierend auf einer (digitalen) Plattform**

- Digitale Wertschöpfungsketten (Digital Ecosystem Business)
- Digitale Transformation gestartet
- Traditionelle Geschäftsmodelle (bzw. Transformation angedacht)

Quelle: BearingPoint Analyse, Interbrand, MIT Initiative for the Digital Economy

Größe der Quadrate = Wachstum



# DIGITAL ECOSYSTEM MANAGEMENT

## Beteiligte in einen Digitalen Wirtschaftskreislauf

