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The connected world

Kostis Stavropoulos

Managing Director
iSquare

The Fourth Industrial Revolution

All Digital - All Connected

virtual reality becomes reality
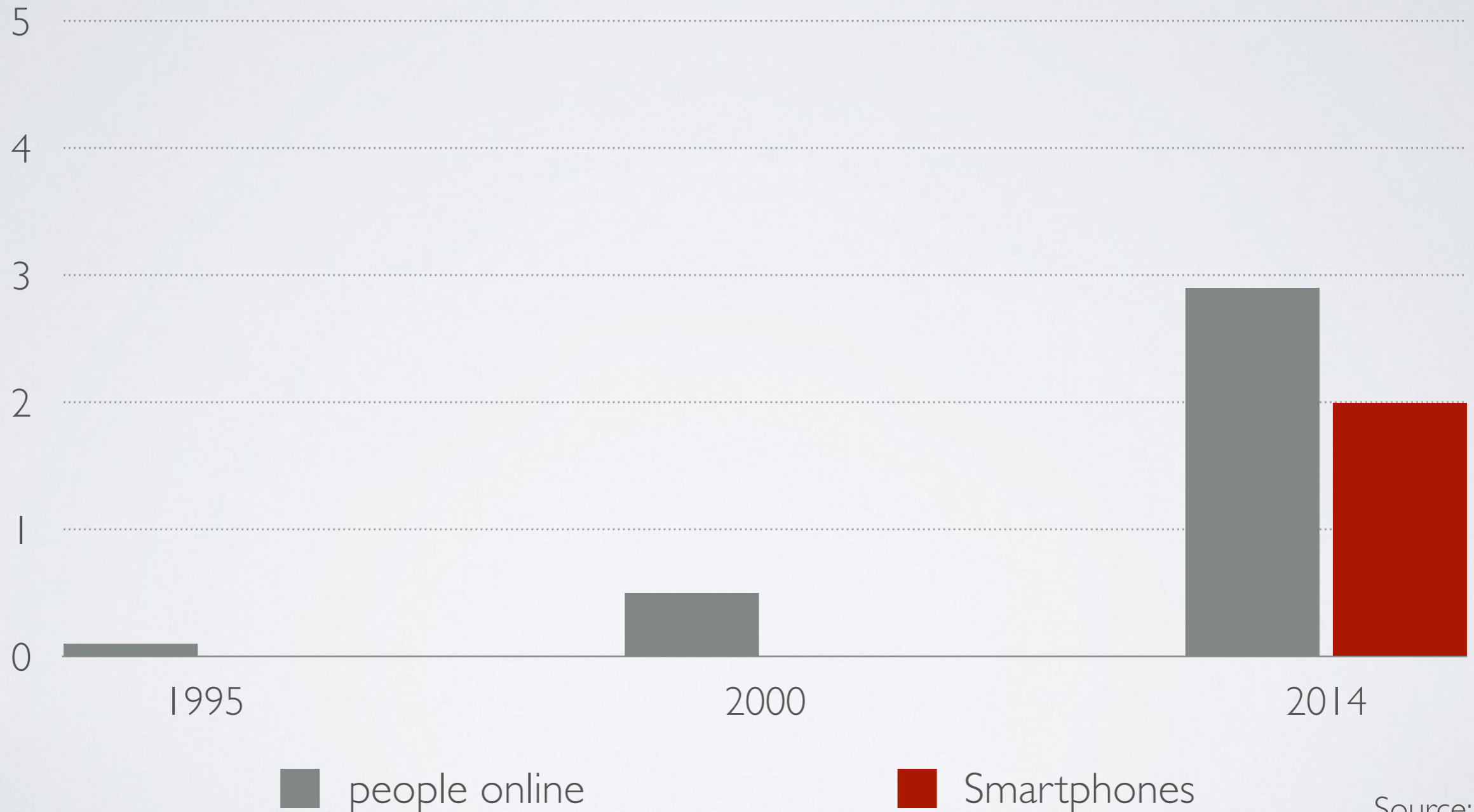
no borders
between physical
& digital "worlds"

What drives this 4th revolution?

- Speed of breakthroughs

- Disruption in every sector

- Connected mobile devices

- AI (self driving cars, siri, drones, apps, etc.)
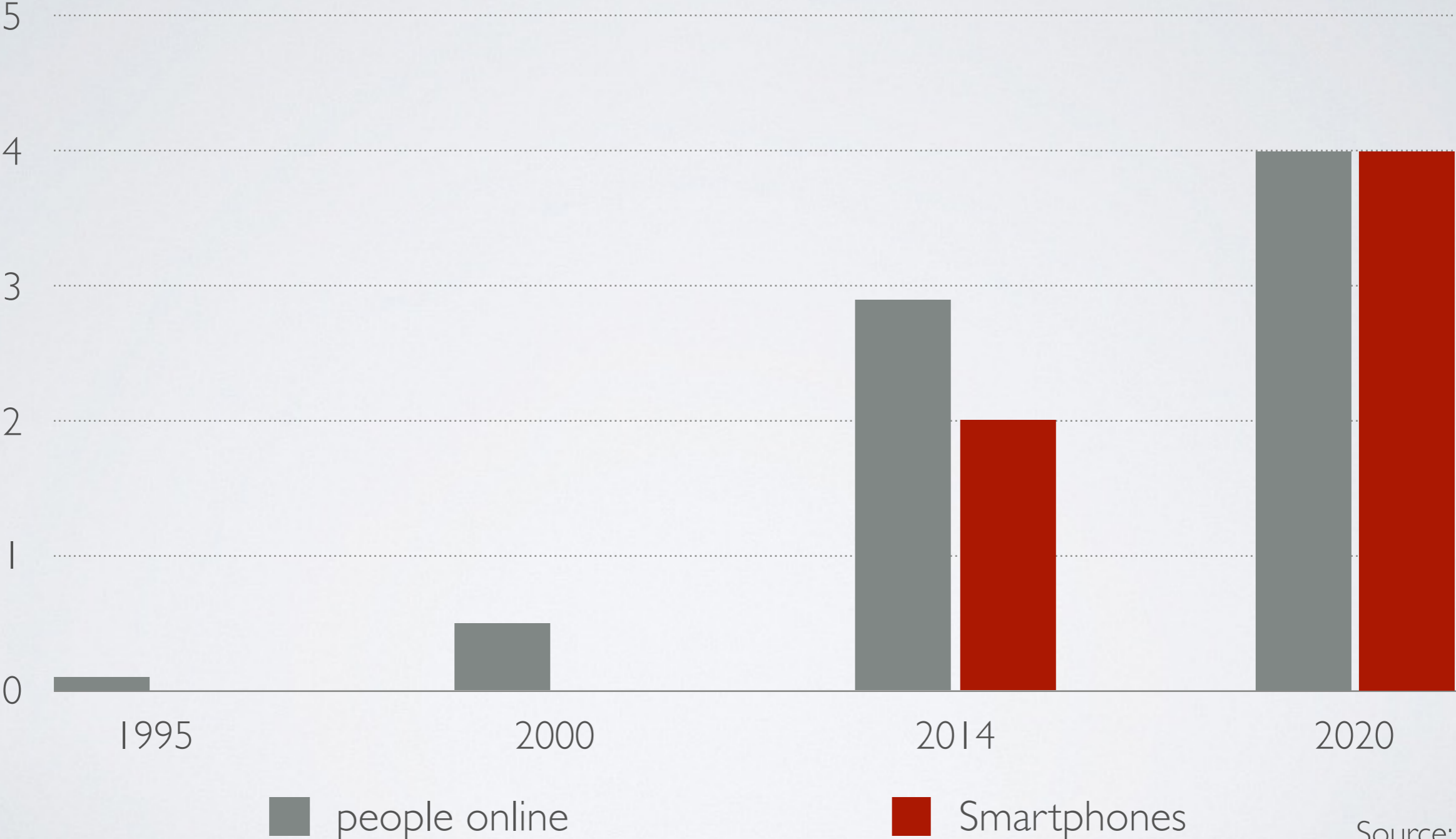
technology is the enabler

Connected People

People online (billions)

	1995	2000	2014

Legend: people online (grey), Smartphones (red)

Source: ITU

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Mobility is the key for online growth

People online (billions)

	1995	2000	2014	2020

people online ▮   Smartphones ▮

It's a (mobile) connected planet!

Global population >18 years

Legend: ● No internet ● No Smartphone

Source: ITU, World Bank
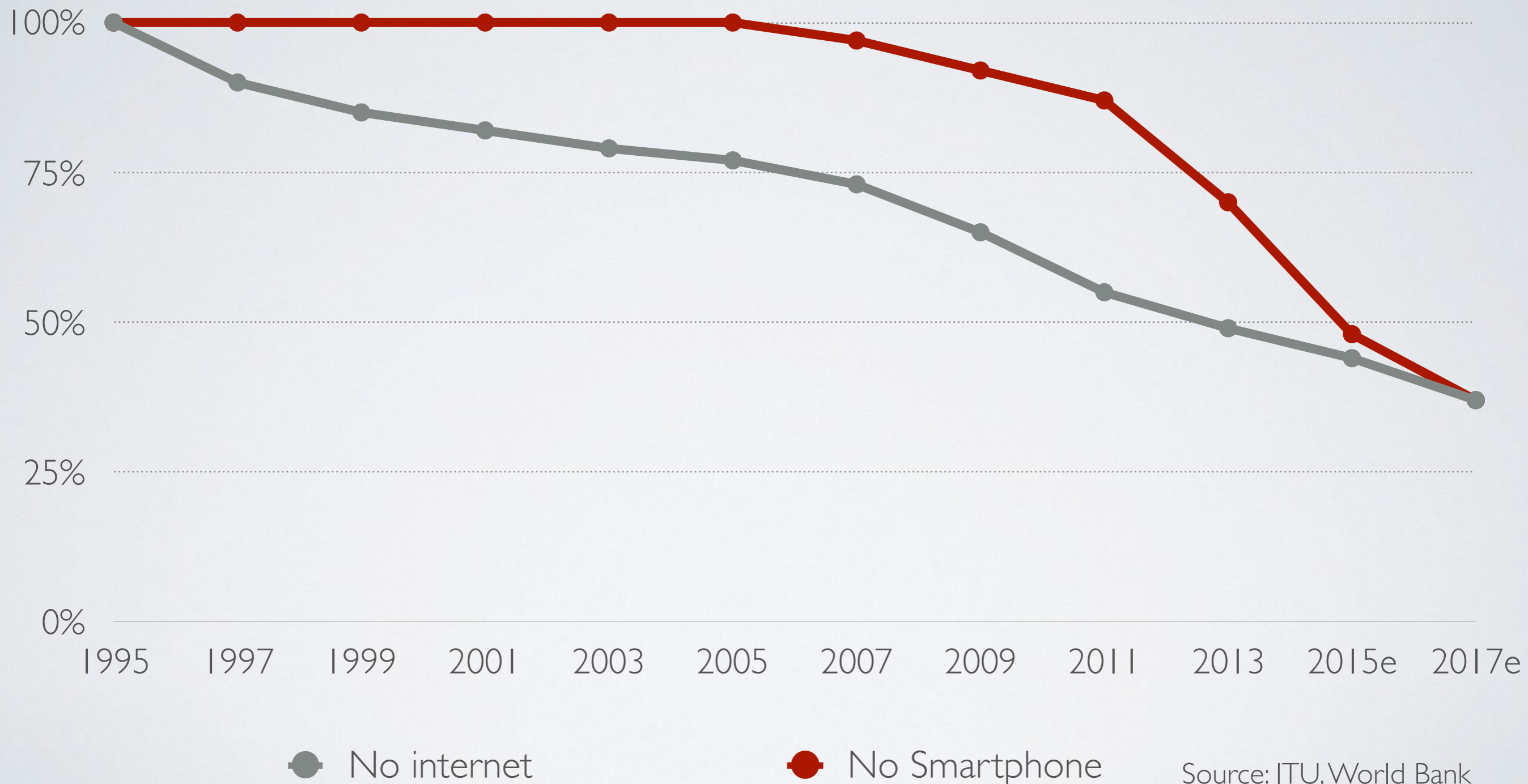
The world in 5 years from now

Global Population (billions)

Legend: ■ 2015   ■ Growth to 2020

Categories: Population, Adults, TV audience, Mobile, Online, Smartphones, PCs

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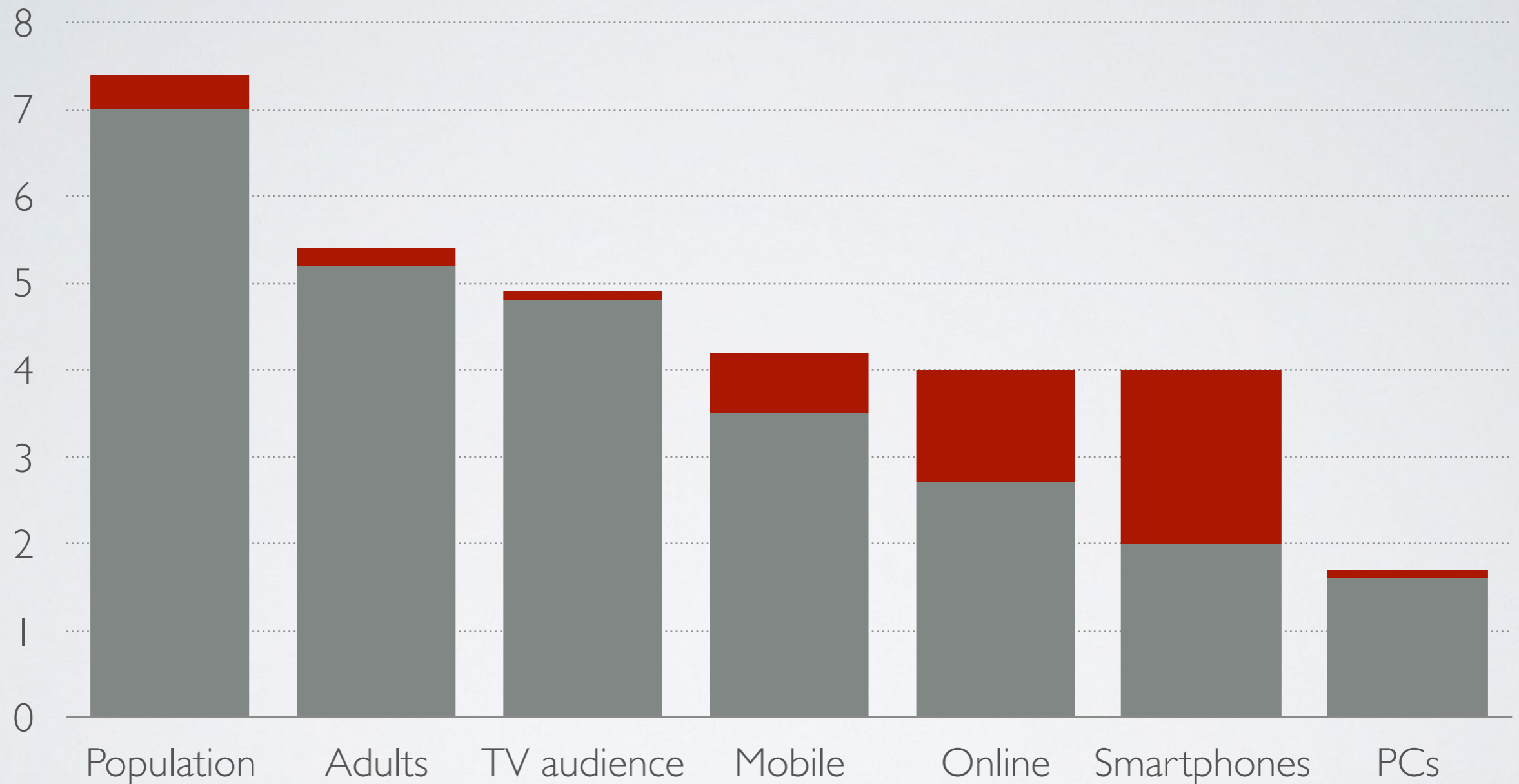
48% of US households have wireless service only

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mobile internet

=

colour tv

Global Population

1	@facebook	1.8B
2	China	1.4B
3	@Tencent	
4	India	
5	@WhatsApp	
6	@LinkedIn	
7	@instagram	
8	@twitter	
9	U.S.	
10	@Snapchat	

always on …

online = smartphones + data

and this revolution has just started …

Vodafone customer base by connection, 12/2015

Germany · Italy · UK · Spain · Neth · Portugal · Greece · Turkey · India

■ 3G/4G data plan ■ Other

[Source: Vodafone, a16z]
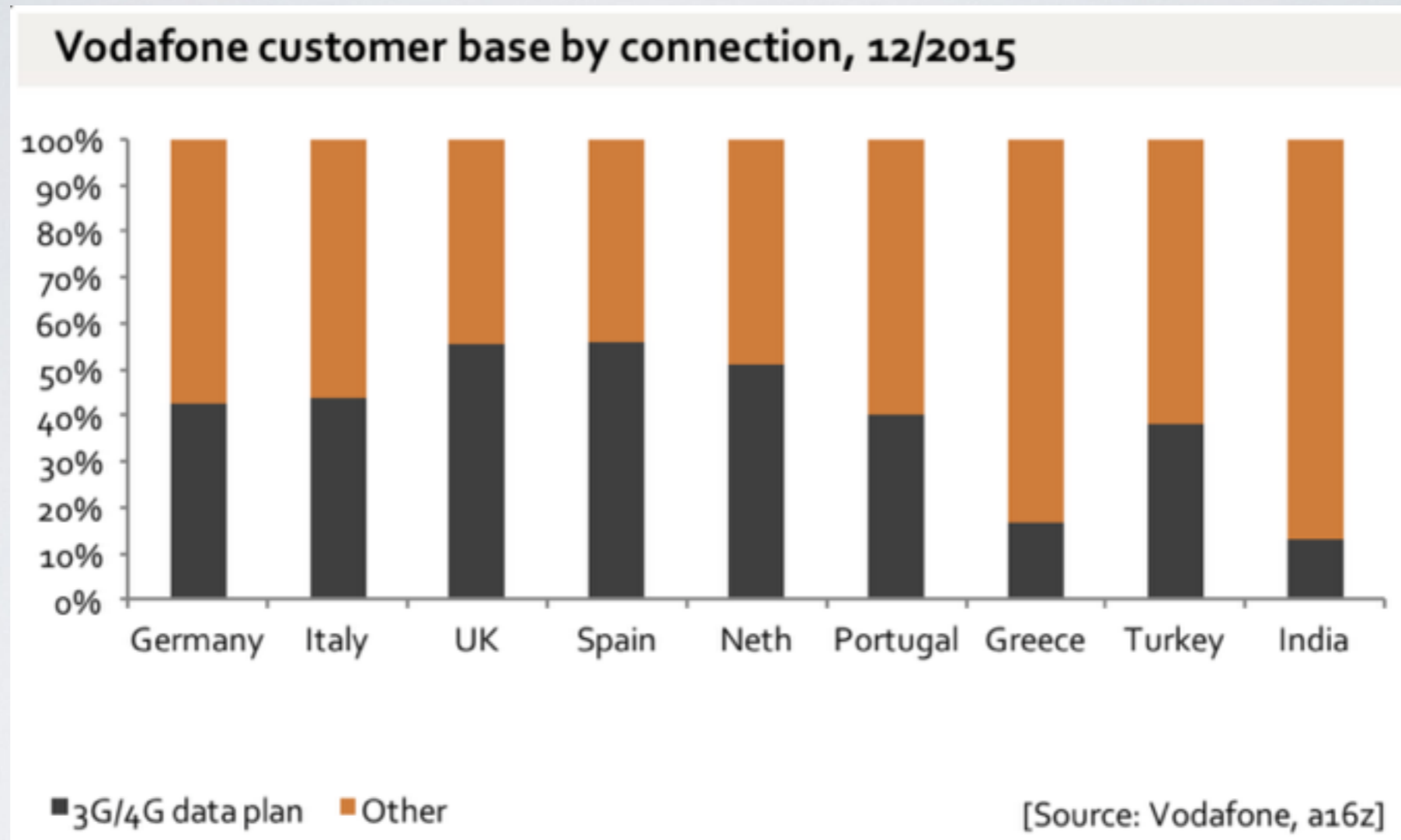
15 YEARS after European operators spent €110bn on 3G spectrum, this is the adoption of data

Source: VF

New devices, new opportunities

Computers don't ask things

Sensors change what a computer can learn

Every new sensor creates a new opportunity
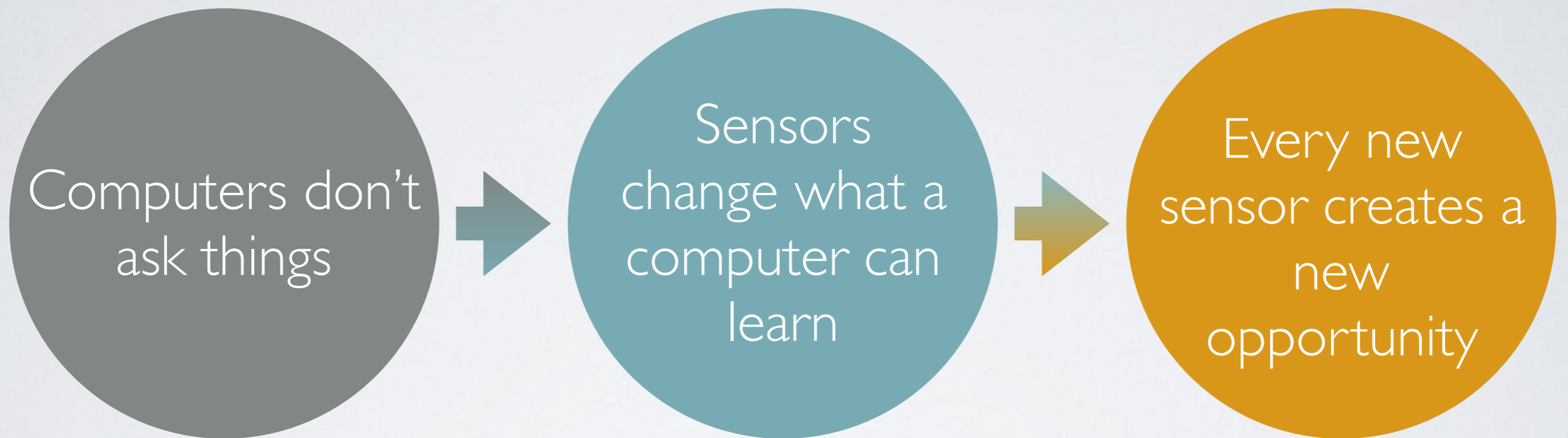
Smartphones, sensors = opportunities

By 2020 there will be ~3x more smartphones than PCs

x

Ease of use
Personal
Anytime, Anyplace
Sensors
Cameras
Location
Transactions
Social

=

Every new sensor creates a new opportunity

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Innovation brings radical change

SMS Globally are about 20bn messages a day

WhatsApp is now doing > 42bn messages a day
WhatsApp has just 57 employees

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Source: GSMA, WhatsApp

Content is fueling mobility growth

1999 - 80bn photos taken on film

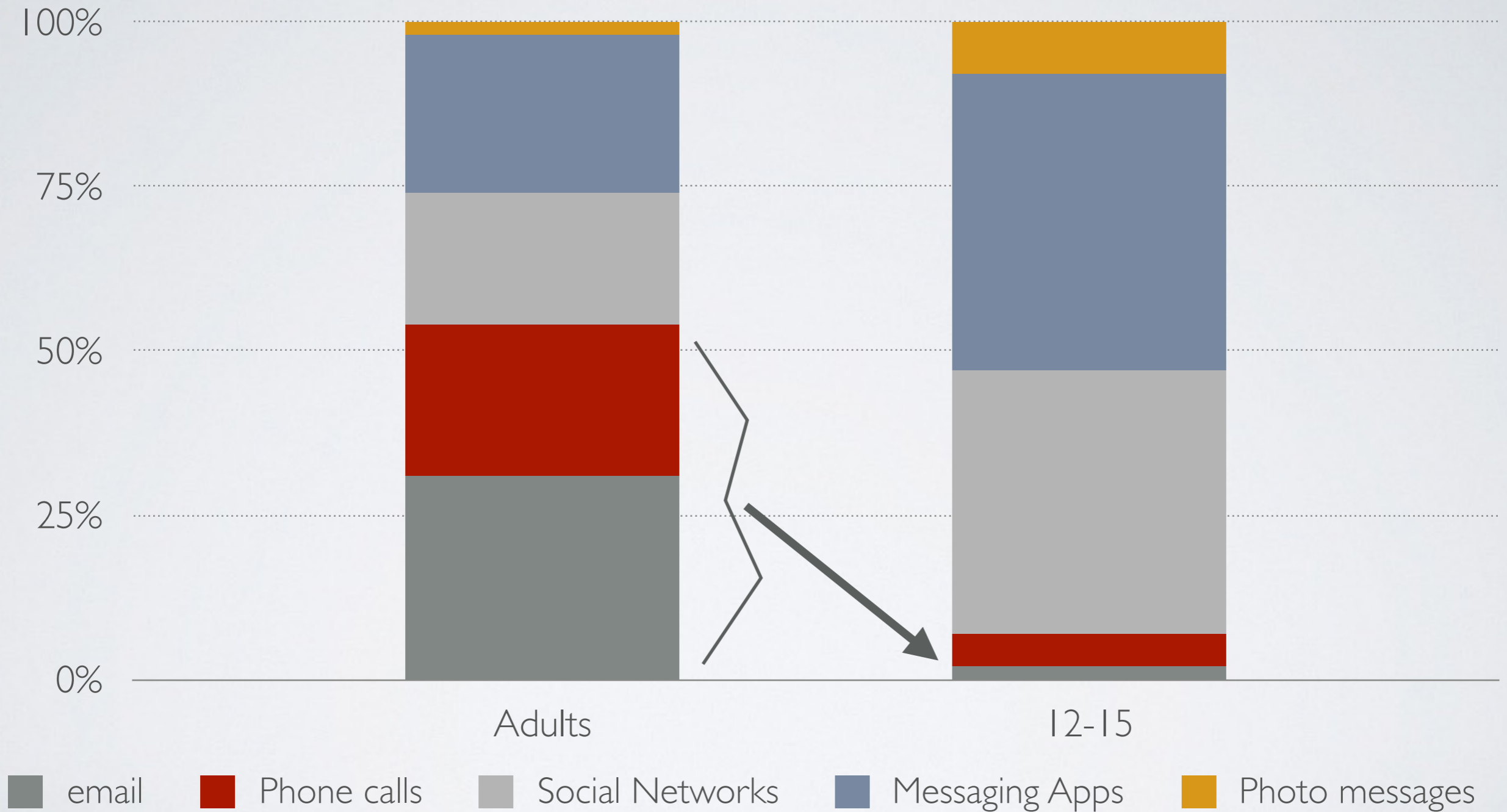2014 - 800bn photos shared on social networks

2015 (proj) - around 2bn photos shared on social networks
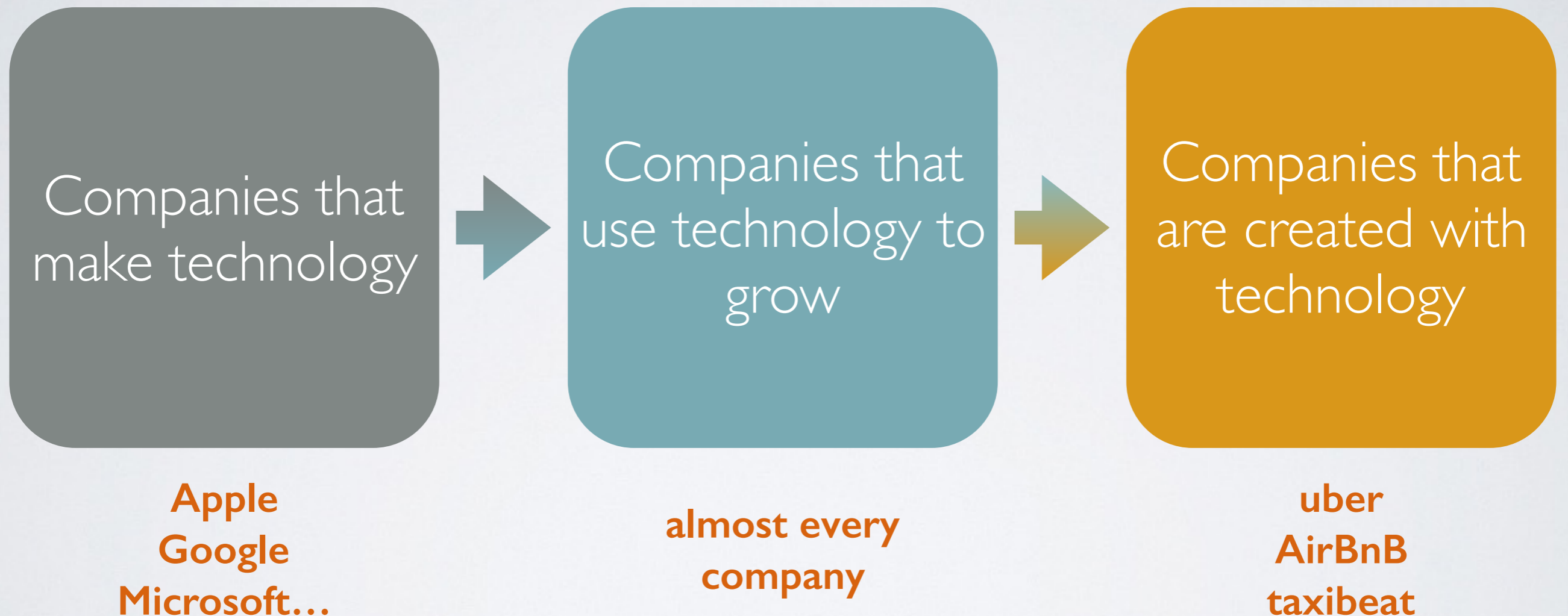
Source: Kodak, Gartner

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Tech & internet are fueling all sectors

Companies that make technology

Companies that use technology to grow

Companies that are created with technology

Apple
Google
Microsoft…

almost every company

uber
AirBnB
taxibeat

Each tech innovation causes disruption

Video	Photography	Mobile	Software
Blockbuster	Kodak	Nokia	RIM
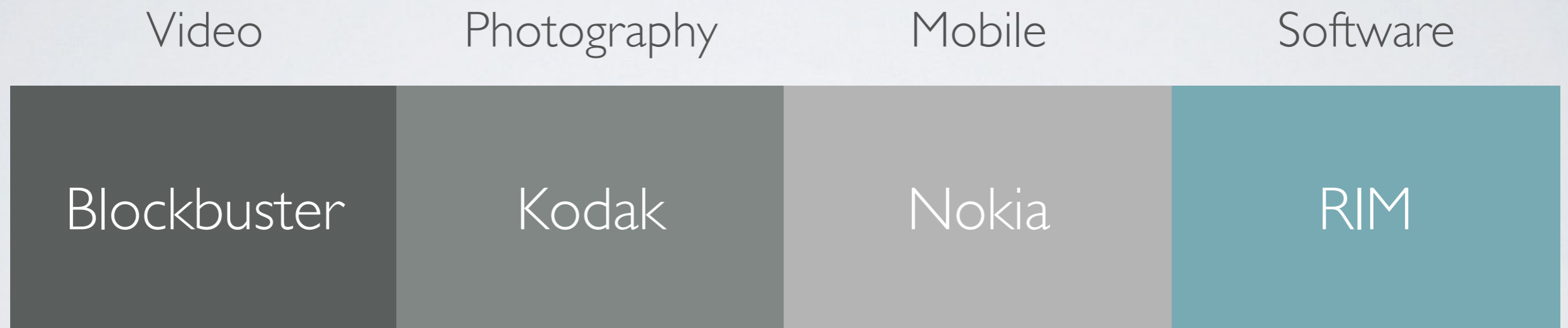
''Innovation distinguishes between a leader and a follower''
Steve Jobs

Mobile allows far more opportunities

then

now

Most tech was bought to be used internally for growth

Uber would have been sold to taxi companies

AirBnB would have been sold to Hilton

Scale of mobile tech has brought down the costs and made easier and faster to grow

More and more companies use tech to disrupt all sectors

New companies / New Businesses are born

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Ζούμε σε μια εποχή γεμάτη ευκαιρίες καριέρας ή νέας επιχειρηματικότητας

Thank you

kostis@isquare.gr

@kostisst

about.me/kstavropoulos