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- Internet & Telecom - Vision about the future
- Trivia and misconceptions
- Factors that drive the change
- Internet Business Models

Trivia and Misconceptions

- **1 billion Internet Users worldwide today** (Source: Internet World Stats)
 - » Estimated 20% already on „always-on“ broadband infrastructure
 - » Global broadband subscriber growth: 20% - 30% per year until 2010
- **3 billion mobile connected users worldwide by 2009** (Source: Gartner)

- **39.000** CDs at Walmart **2+ million** songs at iTunes
- **130.000** books at Barnes & Noble **2.3 million** books at Amazon
- **3000** DVDs at Blockbuster **25.000** DVDs at Netflix

- **Skype – 52m registered, 2m paying customers – plan 2006: \$ 500m+ revenue**
- **Ebay – 150m registered users, 70m Paypal accounts – \$ 40bn market place**
- **Friendster – more than 7m users in first 12 month**

- **BUT: VoIP is not about IP - ask Skype – don't think „horseless carriage“ (Vint Cerf)**
- **BUT: is convergence the right paradigm? do customers really ask for triple play?**
- **BUT: global niche = global competition**

What drives the change?

- The new rules of building the Internet business infrastructure
 - » **falling costs** of all building blocks of the infrastructure
 - » **IP** is the protocol of choice **on all platforms**
 - » **dezentralised**, chaotic extension of the infrastructure (building the “network of networks”)
 - » **open source** software – community invented and built infrastructure

- This trend is leading to
 - » **affordability**, that drives
 - **adoption rates** worldwide
 - **personalisation** of access, access devices, content
 - » an **always-on** user experience – **online = offline**
 - » an **extended reach** of the net – life, devices, geographies, populations
 - » **innovation** at the edge of the network
 - » more and more **intelligence** at the edge – p2p, grid, mesh
 - » **unlimited** virtual **shelfspace**

New Business models?

■ Think

- » **long tail** – use this unlimited shelf space
- » **bop** – bottom end of the pyramid
- » **horizontally decomposed**, not vertically integrated
- » **global** niche – it may be the next big thing
- » **identity** clustering – digital identity services
- » **user empowerment** - consumers best friend
- » **user enhanced** products and services

■ Look for

- » innovation **at the edge** of the network
- » software as a **service**
- » **advertising** revenue
- » **pay-per-purchase**
- » **collaboration** enhancers
- » **user generated** content

- “The best way to predict the future is to invent it.” (Alan Kay)

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