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Association of the Internet Industry

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established 1995

1,000+ members

60+ countries

along the internet value chain

Beyond Industrie 4.0

IoT market trends in Germany

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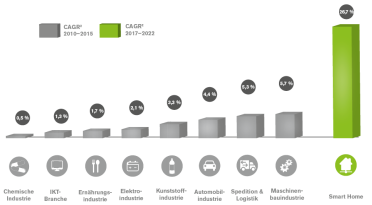
Beyond Industrie 4.0

I) IoT@eco

II) German IoT market



III) Possible impacts on eco & RIPE

IoT@eco

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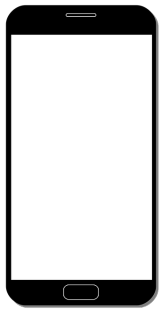
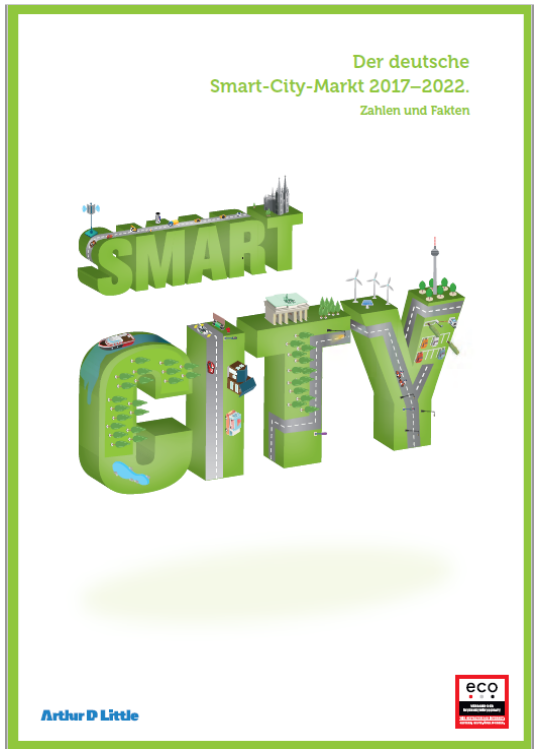


Status quo

Competence Group since 2015

What is the IoT market?

Changes - Difficulties - Categories



COMING SOON

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(German) IoT market

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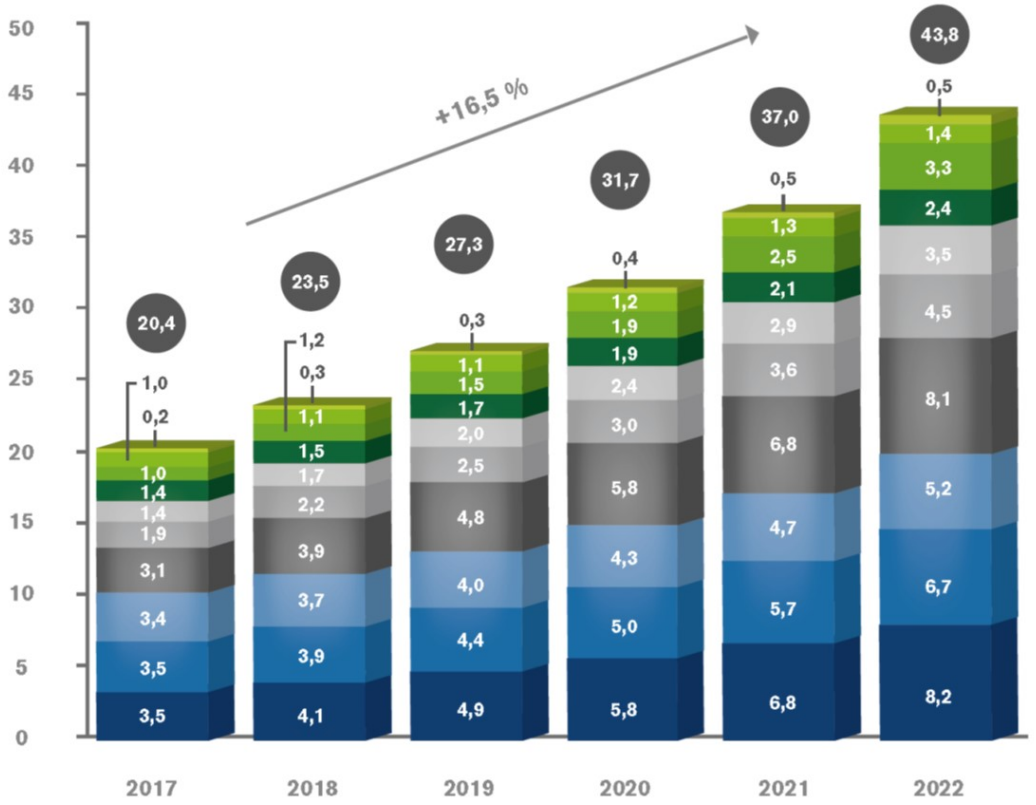
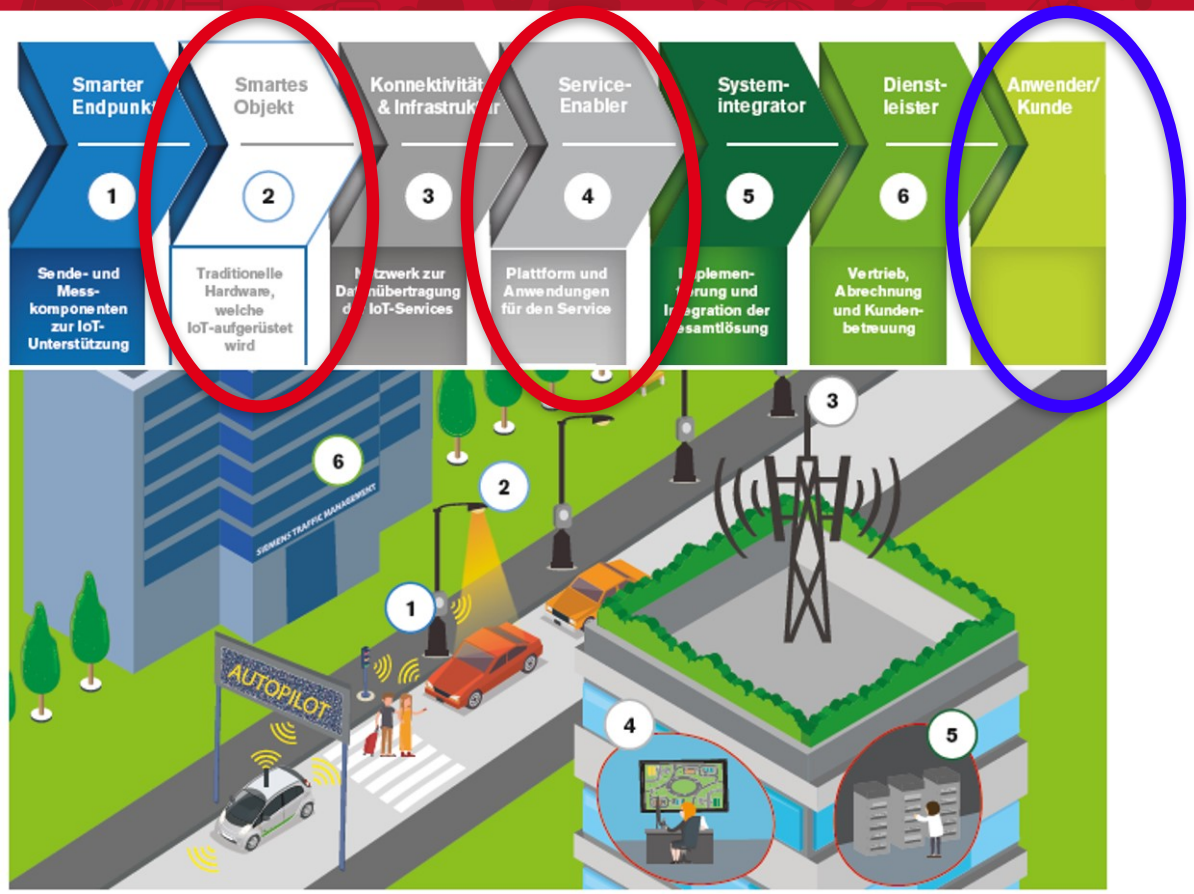
Smart City

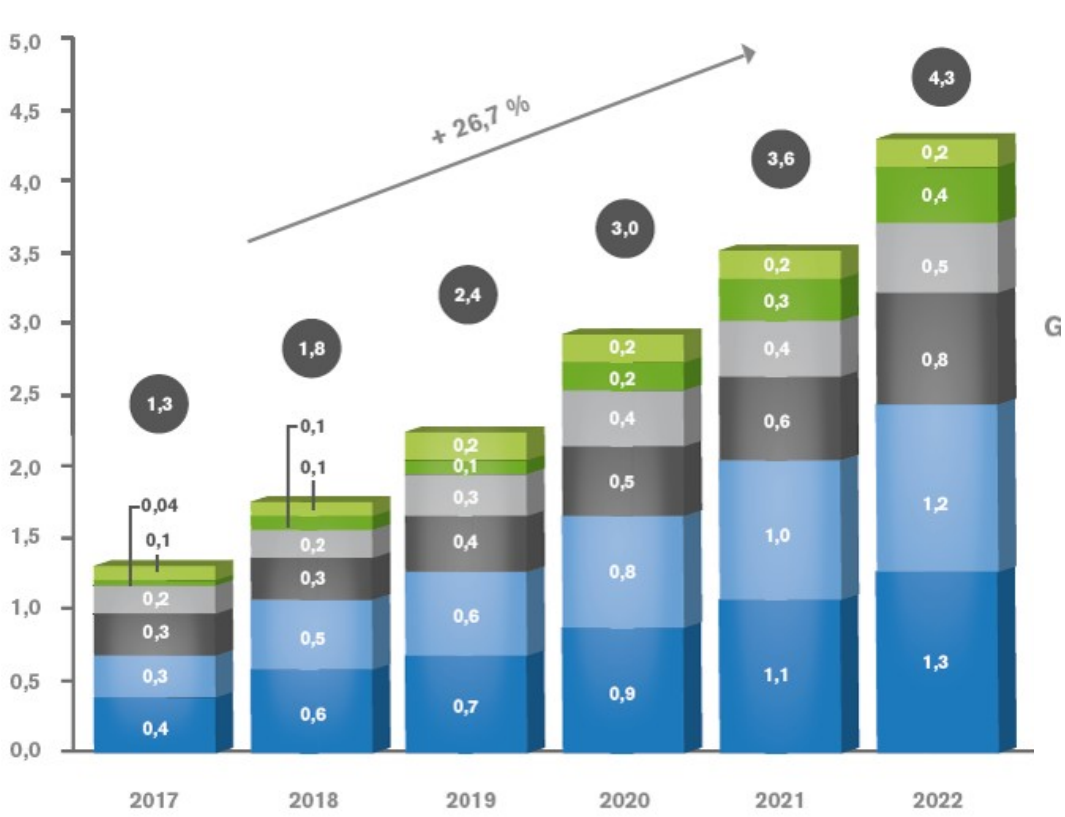


	CAGR¹ 2017–2022
Public administration	19,7 %
Financial services	7,0 %
Education	26,7 %
Tourism & Retail	11,3 %
Energy	19,9 %
Health sector	19,0 %
Building automation	21,1 %
Physical Security	8,9 %
Network Security	13,6 %
Transport & Logistic	18,7 %

Smart City


Smarter Endpunkt
Smartes Objekt
Konnektivität & Infrastruktur
Service-Enabler
System-integrator
Dienst-leister
Anwender/ Kunde
1
2
3
4
5
6
Sende- und Mess-komponenten zur IoT-Unterstützung
Traditionelle Hardware, welche IoT-aufgerüstet wird
Plattform und Anwendungen für den Service
Vertrieb, Abrechnung und Kunden-betreuung
AUTOPILOT

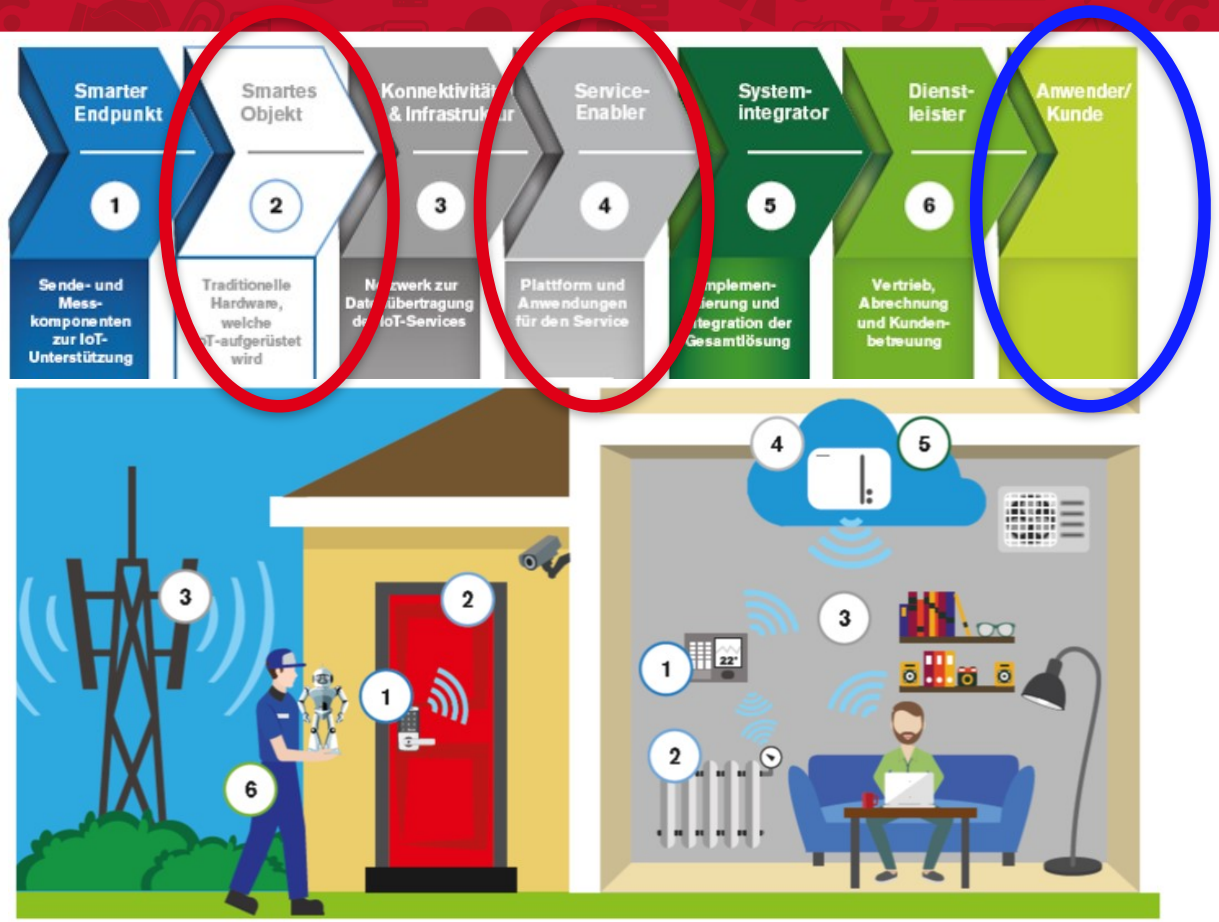
Smart Home



CAGR[1] 2017–2022

Home appliances	22,6 %
Health care & assisted living	57,8 %
Entertainment	21,8 %
Security and access control	24,3 %
Light and window control	27,7 %
Energy management	25,5 %

Smart Home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Traditionelle Hardware, welche
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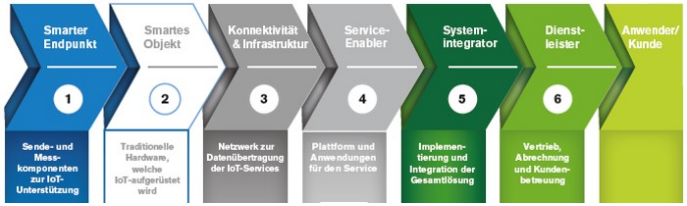
3
Plattform und Anwendungen für den Service
4
Service-Enabler
5
Vertrieb, Abrechnung und Kunden-betreuung
6
Anwender/ Kunde
1
2
3
4
5
6

Conclusion

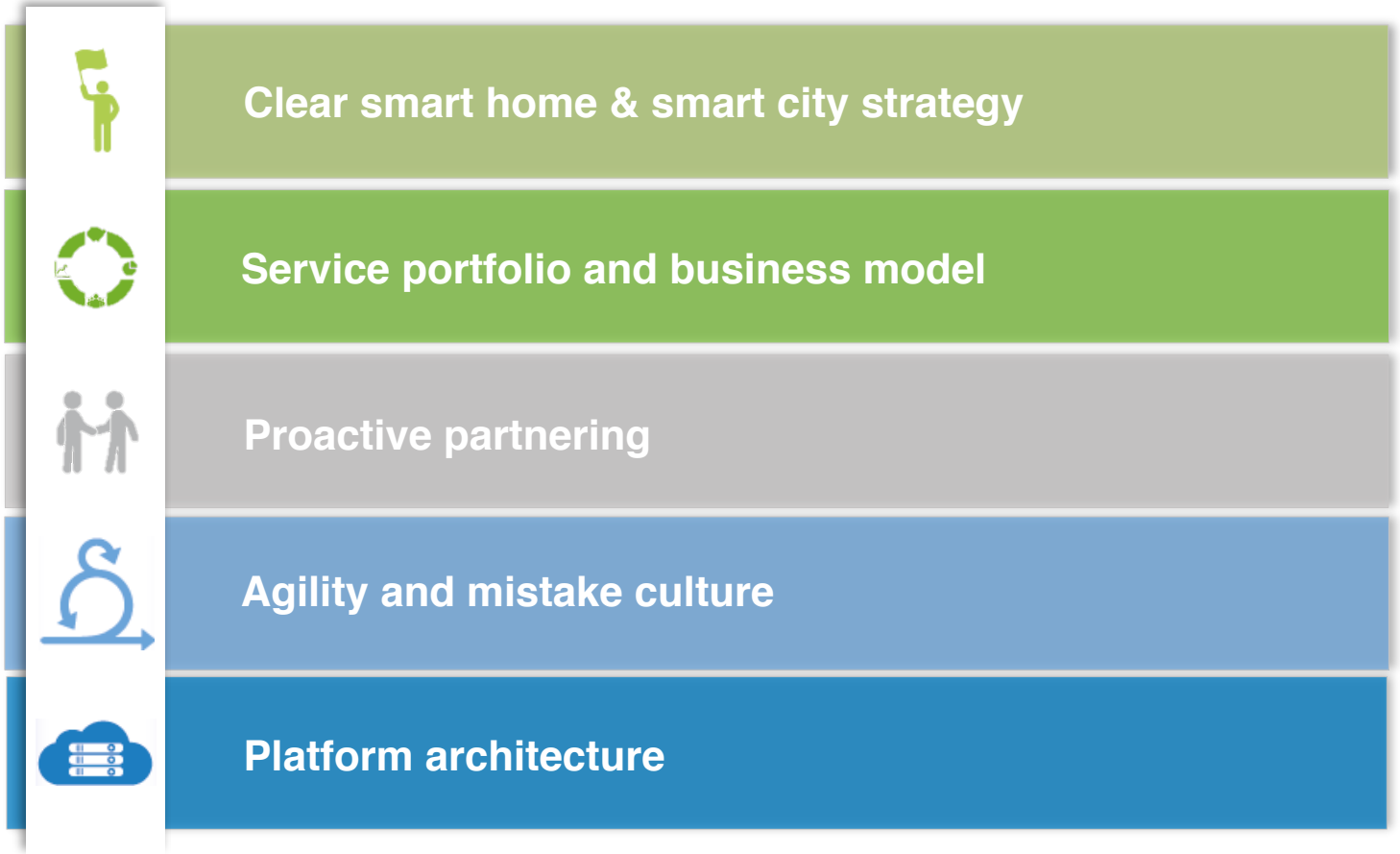
A) Growth

B) Partnering & Cooperation

C) New Players in the market



Critical success factors for smart home & city players



Quellen: Arthur D. Little, eco, Brigham Young University

Who are these new players?

A) Smart object producer

B) IoT Platforms

C) Beyond

D) Who is the customer?

B2B vs B2C

Impacts on eco (and RIPE?)

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A) Technical Issue: Increasing number of devices

B) What is the domain a device is in!?

C) An Internet of Things may never have a blackout or shutdown

D) Integrate the new market players in our network

…to understand their goals and needs

…to work on standards, compatibility and usability

…to increase security & awareness

…to handle the large amount of data

…to connect them to regulators

BECAUSE THEY ARE/BECOME PART OF THE INTERNET INDUSTRY

What do you think?

Thank you ;-)

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