

# ICT Trend in Silicon Valley

- 金の流れで見るICTトレンド -

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Marketing & Business Development



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# Silicon Valley: The Heart of Innovation

Where is SV?



# New Business Model from Silicon Valley

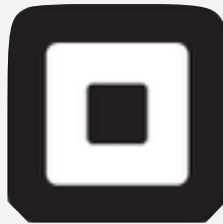
airbnb

venmo



Dr DOCTOR  
ON DEMAND

nest



AUTOMATIC





# Digital World is Coming

## Digital Business / Digital Transformation

- Every Company Becomes Tech Company -



**Zhang Ruimin**  
CEO, Haier

*"My goal is no longer to be a maker of home appliances, but to be an agent of interaction and networking among people who might be anywhere."*

*"Now the car is becoming the ultimate technology product, and we are becoming more of an information company"*



**Mark Fields**  
CEO, Ford



**Tom Enders**  
CEO, Airbus

*"Digitalization and smart tools could drive the integration of Airbus much farther."*

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ここからはカネの話です

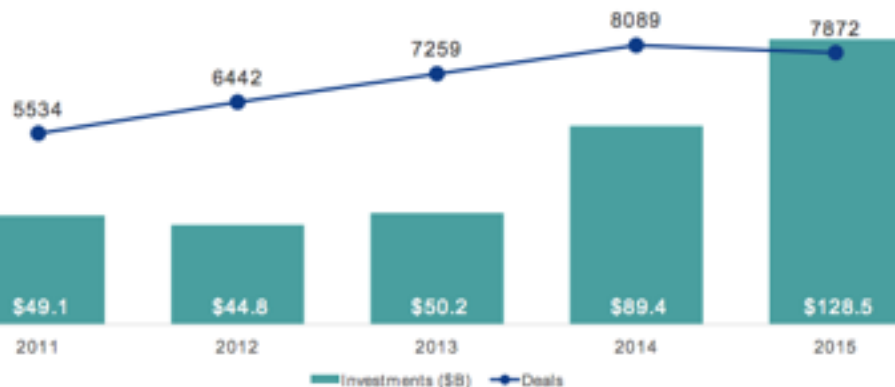
# Funding Update in 2015

- WWで\$128BのInvestment (2014年:\$89B)
- 71社がUnicornに(2014年は53社)
- ただし、Q3以降Investmentは下降トレンドに。  
Q4は2013年Q1以降最も少ないDeal数。
- Seedsラウンド参入が減っている。
- M&Aは過去最大の年に

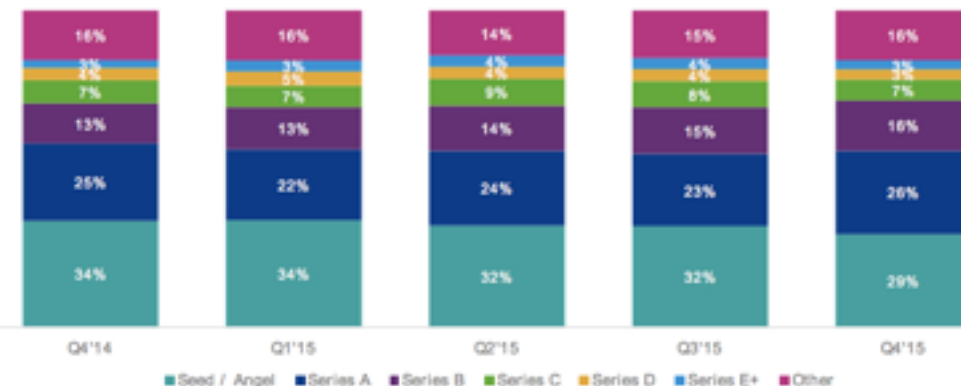
Quarterly Global Financing Trends to VC-Backed Companies  
Q1'11 – Q4'15



Annual Global Financing Trends to VC-Backed Companies  
2011 – 2015



Quarterly Global Deal Share by Stage  
Q4'14 – Q4'15





*In Q1 2016*

## ASIAN

*VC-backed Companies raised*  
**\$6.5 billion**

*In Q1 2016*

*In Q1 2016*

## NORTH AMERICAN

*VC-backed companies raised*  
**\$15.2 billion**

# GLOBALY

*VC-backed companies raised*

**\$25.5 billion**

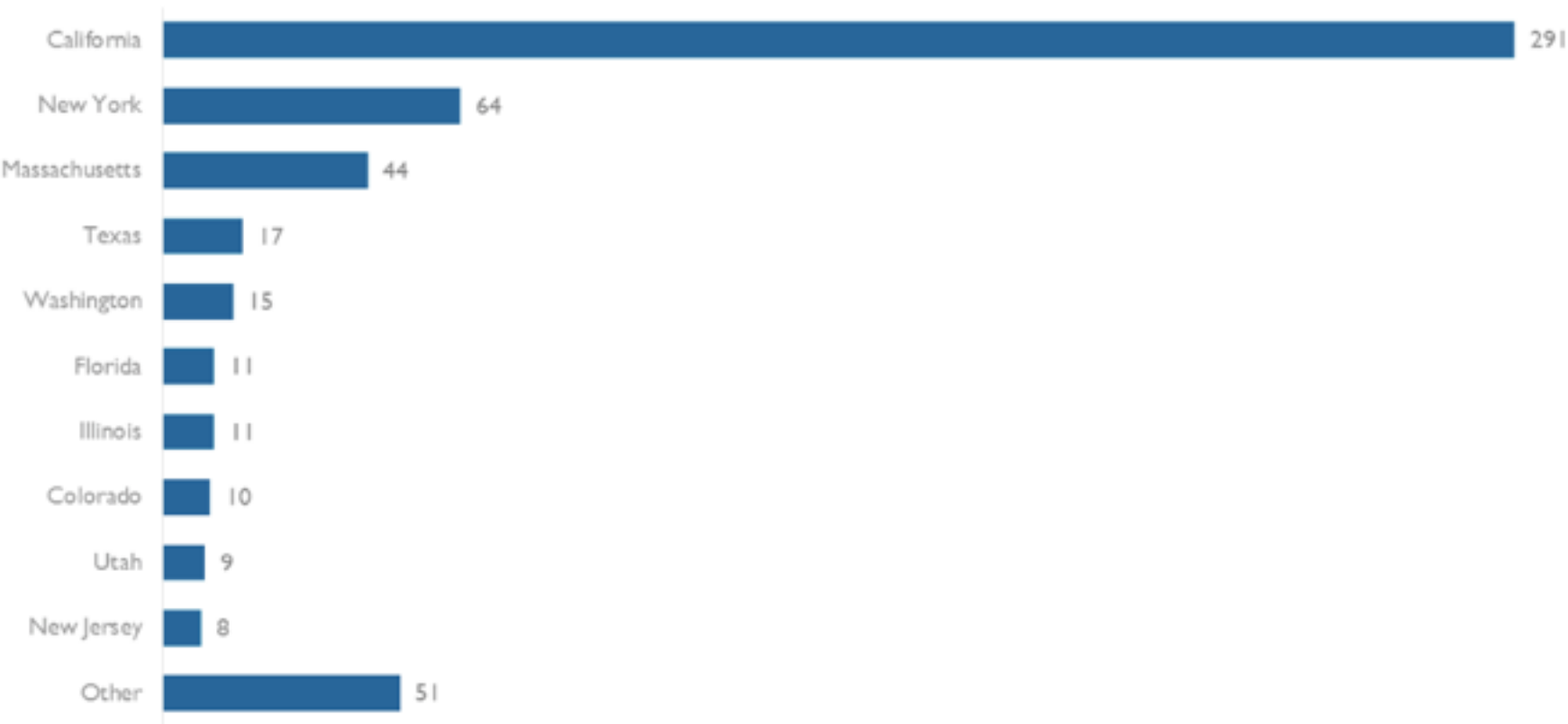
*In Q1 2016*

## EUROPEAN

*VC-backed companies raised*  
**\$3.5 billion**

# Silicon Valley Dominates Tech IPO Pipeline

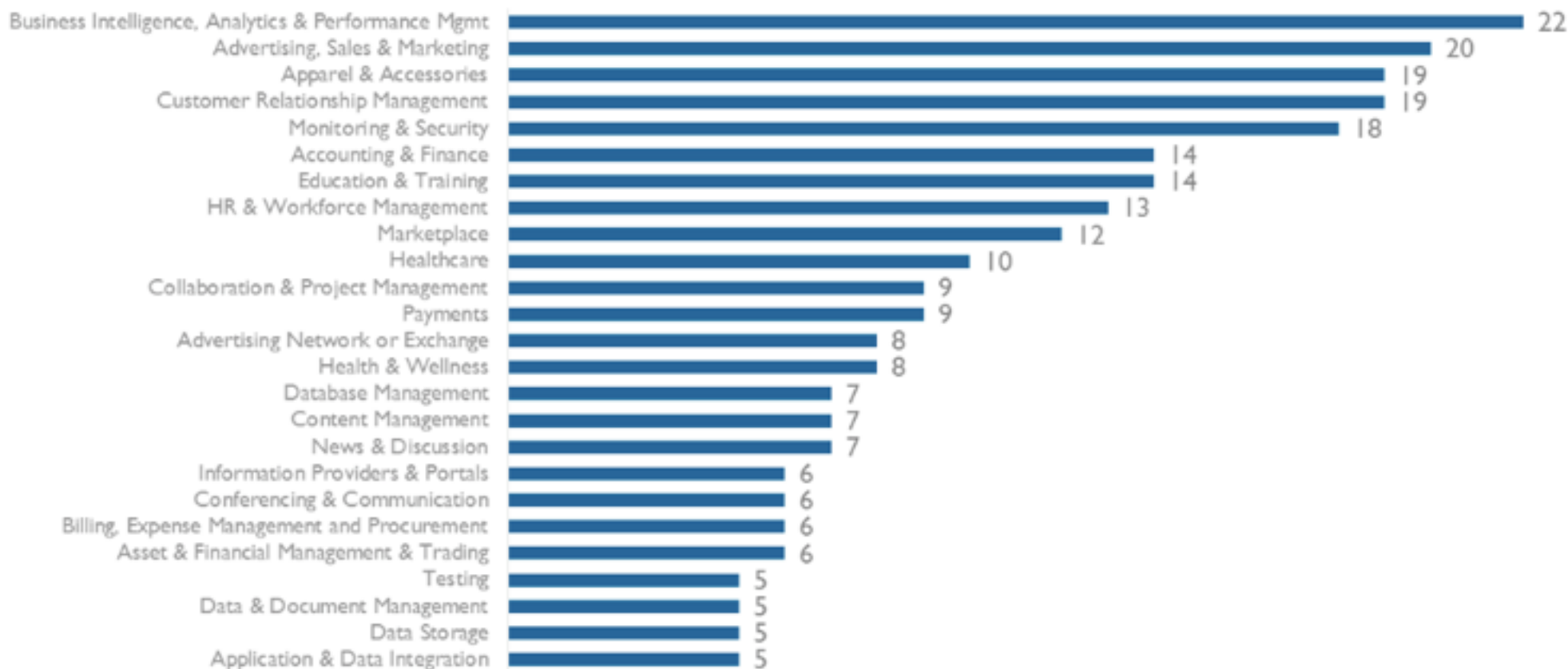
**2016 Tech IPO Pipeline**  
*Company Count, by State*





# BI & AD-Tech leads investments

## 2016 Tech IPO Pipeline *Company Count, Top 25 Internet Subindustries*



# Among Unicorns, SV Angel, Sequoia, A16Z lead all investors

## The Top 15 Investors in the Billion Dollar Valuation Club

Investor	Number of \$1B+ Companies	% of Cos Investor Got in 1 <sup>st</sup> or 2 <sup>nd</sup> Round
SV Angel	21	67%
Sequoia Capital	20	45%
Andreessen Horowitz	18	39%
Fidelity Investments	16	0%
Kleiner Perkins Caufield & Byers	13	0%
T. Rowe Price	13	0%
Wellington Management	13	8%
Founders Fund	12	33%
Tiger Global Management	11	9%
Goldman Sachs	11	0%
New Enterprise Associates	11	18%
Khosla Ventures	11	45%
Salesforce Ventures	11	9%
Accel Partners	11	45%
Institutional Venture Partners	11	9%

# まとめ

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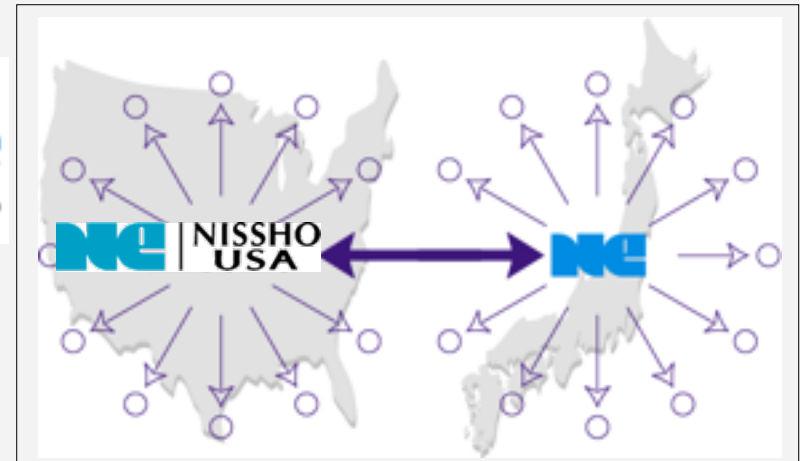
- シリコンバレーに金が集まる
- シリコンバレーのTech系見とけばなんとなくトレンド追えそう
- AI, Ed-Techとかが熱そう
- どのVCが金入れてるかとかも見てると良さそう



## Innovation-Leading Company

**Bridging advanced technologies coming to Japan  
from the United States, the IT leading country**

- ◆ Established : February, 1985
- ◆ Capital : US\$ 2 million
- ◆ President : Tatsuo Hosoi
- ◆ Employees : 4 people  
(as of Apr, 2016)



### Main Business

- ◆ ICT Market trend & technology research
- ◆ Identifying cutting-edge technologies and business opportunities, and presenting such items to the Asian Market including Japan
- ◆ Conduct Global business opportunities with Japanese and APAC service provider customers
- ◆ Build strong partnerships with existing & potential supplier partners
- ◆ Strong focus on SDI, DevOps, Mobile, Security, Cloud, BD/Analytics etc.



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# Thank you!



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