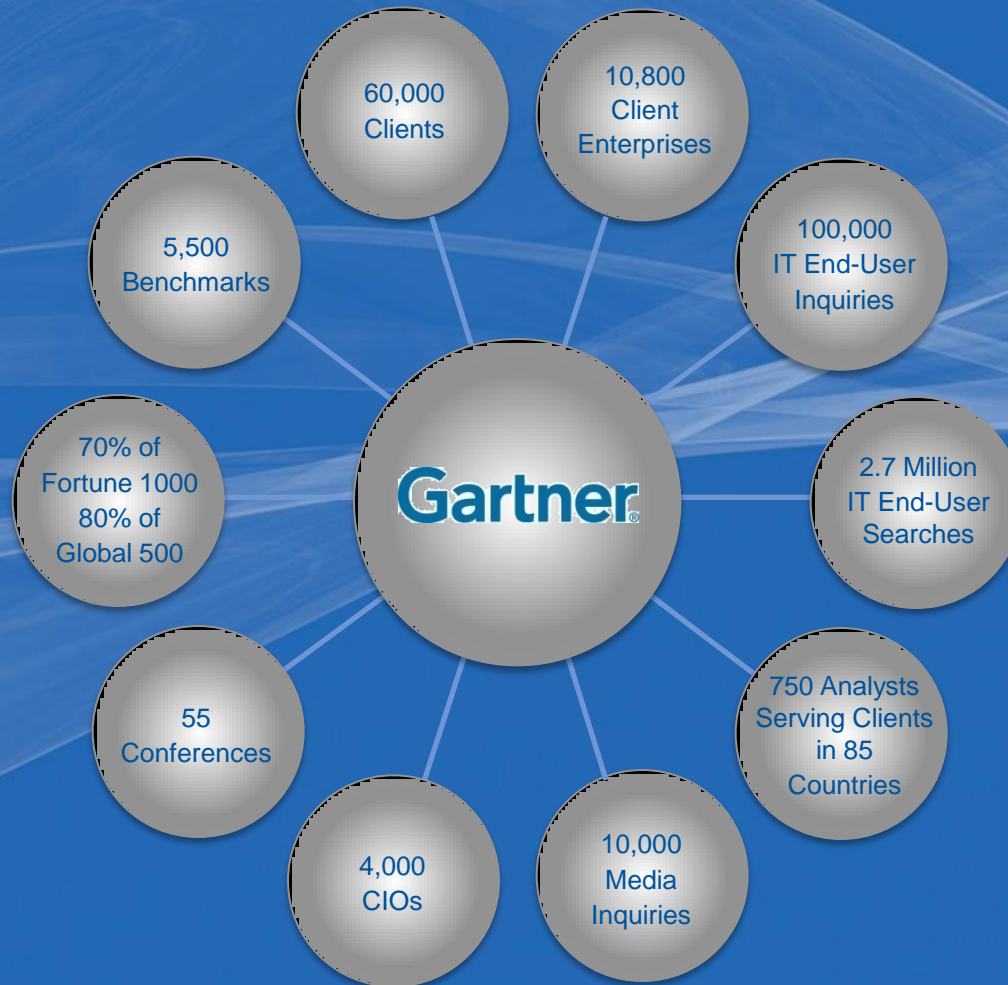


Welcome!

Thank you for joining us on today's Gartner webinar.



Gartner Webinar: The Impact of Mobile World Congress on Providers

Roberta Cozza, Carolina Milanese, Jon Erensen,
Stephanie Baghdassarian, Sylvain Fabre

March 1st 2011

Agenda

- Consumer Devices
- Semiconductors
- Applications and Services
- Networks/Mobile Infrastructure
- Q&A

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Consumer Devices

Roberta Cozza, Carolina Milanese

Nokia & Microsoft Enter into Strategic Partnership

NOKIA
Connecting People

Microsoft



Windows
phone

symbian
OS

What does it mean ?

- Nokia retire Symbian & adopt WP7 as it's main OS.
- Nokia & Microsoft to share technology & relationships for services
- Nokia's R&D spending on smartphones will decrease
- Two major divisions announced: Smart devices & Mobile Phones

Implications

- If Nokia delivers on product design, WP7 has the first real opportunity to become a leading OS
- Organizations using Nokia smartphones or Ovi services must revise their strategy.
- Device manufacturers competing with Nokia should watch for and exploit the market gaps that could emerge as this strategy unfolds.

Evolution rather than Revolution



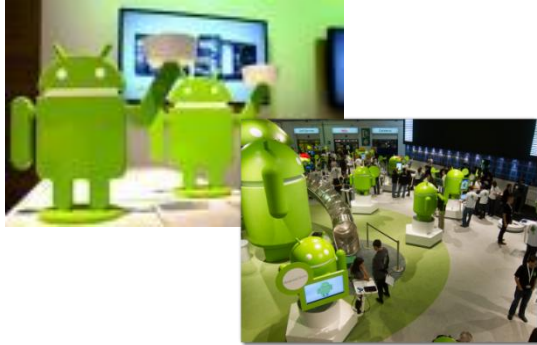
What does it mean ?

- Evolution in technology/HW capabilities helps drive differentiation
- Ecosystem expansion remains critical factor for HW vendors
- Reaching new user constituents in existing markets

Implications

- Balancing rapid technology advancements and costs, while delivering true user value
- Rationalized portfolios and clearer device propositions

Will Android rule the World?



MeeGo™ ?

What does it mean ?

- Ecosystem brands become more relevant
- OS providers have entered a period of accelerated platform evolution
- Moving beyond smartphones

Implications

- Level of platform innovation is main competitive differentiator
- Other ecosystems emerging/surviving beyond the top 2 or 3?
- Multiple-device users drive need for unified/consistent personal ecosystems

Media Tablets: Can You Tell Them Apart?



What does it mean ?

- Many announcements little differentiation
- 10" to target the high-end of the market
- Low-end offering comes with compromises
- CSPs to be key channel for tablets

Implications

- Media tablets are key to the computing continuum
- Possible bifurcation of Android on 7" – Gingerbread 10" Honeycomb

Related Gartner Research

- **Forecast: Connected Mobile Consumer Electronics, Worldwide, 2008-2014, 4Q10 Update**
Carolina Milanesi et al., (G00209866)
- **SWOT: Android, Mobile Devices, Worldwide**
Roberta Cozza (G00208426)
- **Nokia Retires Symbian and Allies with Microsoft for Smartphones**
Nick Jones, Carolina Milanesi (to be published)
- **Key Issues for Consumer Devices, 2011**
Carolina Milanesi (G00210550)
- **Market Share Analysis: Mobile Devices, Worldwide, 4Q10 and 2010**, Roberta Cozza et al., (G00210790)

Semiconductors

Jon Erensen

High-performance Application Processors

Significant performance increase on the horizon



What does it mean ?

- Processing and graphics performance increase for high and low-end solutions
- Enables Next-generation of high-performance applications
- Smartphones and Tablets with the performance of laptops
- Quad-core CPU @ 2.5GHz, multi-core GPU, Dedicated HW accelerators

Implications

- Opportunity to use a single device in multiple settings
- Enable new applications including: augmented reality, context-aware computing, 3D capture, gesture control, computational photography

LTE Gains Momentum

Multimode LTE solutions expand



What does it mean ?

- Significant improvement in download/upload speeds
- Low-latency allows real-time access to data
- Multi-mode chipset availability
- Initial Focus on USB dongles and other data products

Implications

- Home broadband access speeds on the go
- Improved bandwidth and latency will fundamentally change how we use mobile devices particularly in relation to the cloud

Mobile Phones Embed NFC

NFC capable device installed base accelerates



What does it mean ?

- One step in enabling an NFC ecosystem
- Broad mobile phone OEM support
- International carriers adopting standardized NFC
- QCOM and other leading semi vendors supporting NFC technology

Implications

- Enable a broad range of applications: Mobile payments, transportation, mobile marketing, digital signage, secure device pairing

Related Gartner Research

- **Forecast Analysis: Mobile Phone Application-Specific Semiconductors, Worldwide, 2008-2014**
Jon Erensen (G00201661)
- **Hype Cycle for Mobile Device Technologies, 2010**
Carolina Milanese (G00205575)
- **Apple and NFC: A Move Into Payments**
Ken Dulaney, Avivah Litan, Alistair Newton (G00205347)
- **Market Insight: The Outlook on Mobile Payment**
Sandy Shen (G00200310)
- **Verizon Launches the Largest LTE Network**
Phillip Redman (G00209722)

Applications and Services

Stéphanie Baghdassarian

Applications, Applications, Applications



What does it mean ?

- CSPs willing to fight
- Multi-platform is the next phase
- Applications = changing media consumption habits

Implications

- Increased focus on applications and on an integrated multi-device experience open new channels to market
- Risk is the fragmentation and interoperability

Mobile Marketing and Advertising Refined

YAHOO!



Google
admob



gemalto

What does it mean ?

- Wide consumer reach
- New business models
- New channels
- New revenue opportunities

Implications

- Measurement and targeting of campaigns are crucial to develop the market
- Key to success: moving mobile marketing and advertising from interruption to engagement.

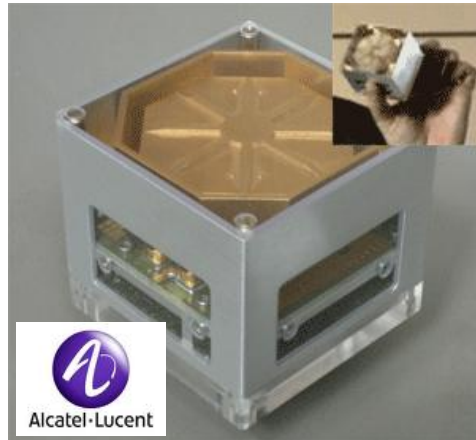
Related Gartner Research

- **Forecast: Mobile Application Stores, Worldwide, 2008-2014**
Stéphanie Baghdassarian, Carolina Milanesi
(G00209676)
- **Market Insight: Ten Consumer Mobile Applications to Watch in 2012**
Sandy Shen, et al. (G00208745)
- **Hype Cycle for Consumer Services and Mobile Applications, 2010**
Sandy Shen (G00200989)
- **Forecast: Mobile Advertising, Worldwide, 2008-2014**
Stéphanie Baghdassarian, Andrew Frank (to be published)

Networks/Mobile Infrastructure

Sylvain Fabre

Radio access moves to the Cloud



What does it mean ?

- Processing pushed to Cloud
- Double site capacity
- Halve site costs
- Radio network soon commodity

Implications

- Mobile infrastructure cost curve supports data growth
- CSPs to differentiate in Network quality, Services

Subscriber Experience Management critical



What does it mean ?

- Tablets magnify issues
- Video optimization needed
- Reducing data volume

Implications

- CSPs to increase spend on Optimization infrastructure
- No more best effort – Quality of experience to be key sales point for CSP

Towards the Networked Society



What does it mean ?

- Vision: 50Bn connections by 2020
- What can be connected will be connected
- PC/tablet in the Cloud
- Connected Clouds
- Pervasive Augmented Reality

Implications

- Sustained demand not just for capacity but also signaling
- No more Mobile Internet - simply Internet

Related Gartner Research

- **Hype Cycle for Wireless Networking Infrastructure, 2010** Sylvain Fabre, Peter Kjeldsen (G00201741)
- **Market Trends: Worldwide, How Mobile CSPs can Control the Mobile Data Explosion, 2011** Sylvain Fabre, Jessica Ekholm (ID:G00210284)
- **Magic Quadrant for LTE Network Infrastructure** Sylvain fabre, Deborah Kish (G00175119)
- **Dataquest Insight: LTE and Mobile Broadband Market, 1Q10 Update** Sylvain Fabre, Jessica Ekholm (ID:G00174131)

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