

## Symbian Adopts Open Platform to Head Off Threat From Android

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Symbian's announcement is timely as the mobile device market moves toward open platforms. The battle in the mobile space is now shifting to the software and services that run on these platforms.

### Event

On 24 June 2008, Nokia, Sony Ericsson, Motorola and NTT DoCoMo announced their intent to unite Symbian, S60, UIQ and MOAP(S) to create a single open mobile software platform. They plan to establish the nonprofit Symbian Foundation together with AT&T, LG Electronics, Samsung Electronics, STMicroelectronics, Texas Instruments and Vodafone to extend the platform's appeal. The foundation will provide a unified platform comprising an operating system (OS), middleware, a user interface (UI) framework, runtimes and an application suite, with the addition of a comprehensive set of tools and a software development kit. Membership in the foundation will be open to all organizations. The latest releases of Symbian, S60, UIQ and MOAP(S) will be available to all foundation members, under a royalty-free license, from the foundation's first day of operations, which is planned for 1H09. The foundation plans to release its unified platform in 2010.

### Analysis

In 1Q08, Symbian controlled 57.1% of the smartphone market, which represented a rise in volume of 16.1% but a drop in share of 6.4 percentage points. This fall underlines that the market for OSs is becoming more competitive as new players, such as Apple and Google, enter the mobile-phone industry. In addition, traditional enterprise players such as Research In Motion and Microsoft have been stepping into Symbian's territory by showing greater interest in the consumer market.

The announcement comes at a time when there are rumors of possible delays for Android-based devices, which were expected in 2H08. Although HTC has confirmed it will have two handsets available before the end of 2008, others, such as LG and Samsung, have stated that their products will arrive in 2009. The Symbian Foundation is offering an alternative to Android both as a platform for manufacturers and as a possible services business model for operators. Operators are interested in a lower-cost open platform, but they might perceive Google's advertising-funded approach as a threat to their service offerings.

Although manufacturers can get access to the code, royalty free, by paying a \$1,500 membership fee and becoming a member of the foundation, the unified open-source framework will not be ready before 2010. We feel that the 2010 time frame is not aggressive enough to hinder Android's move into the market. The Symbian Foundation should be looking to have products based on the framework in the market in 2009.

Nokia's acquisition of Symbian makes sense because of the volume of S60 devices sold and the royalty fees paid for them. The open platform should increase the number of Symbian OS-based devices in the market, which will offer Nokia a wider market for its Ovi offering. In addition, Nokia's well-established developer community — Forum Nokia — could be a strong advantage over Android. Nokia will shift some of the focus Forum Nokia currently has on S60 to the new platform, but will continue to develop differentiated offerings so that it stands out from its competitors.

Having a common framework for the Symbian UI will help consolidate development efforts. This should also remove some fragmentation from the market, which benefits operators and consumers. Unfortunately, unless the Symbian Foundation is prepared to enforce UI profiles, we will continue to see fragmentation as manufacturers attempt to differentiate their offerings.

The market is clearly moving from proprietary to open platforms. But the importance of the platform is decreasing as the focus moves to the software and services that run on it. And it is this battle that Nokia has long been preparing for.

## RECOMMENDATIONS

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- **Asian mobile device OEMs:** Consider becoming a member of the foundation as soon as possible to gain access the royalty-free Symbian code so you can start developing products for the OS.
- **Developers of mobile applications:** Consider developing applications for the current Symbian OS, as the new platform will be backward-compatible.
- **Mobile device manufacturers focusing on the consumer market:** Move to support the Symbian and Android platforms. Developing a proprietary solution will slow your time to market and reduce access to money-making services.
- **Vendors of OSs for mobile devices:** Assess whether you need to adopt new licensing models.

## RECOMMENDED READING

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- "Market Share: Smartphones, Worldwide, 1Q08" — In 1Q08, worldwide smartphone sales to end users reached 32.2 million units and accounted for 11% of the global mobile device market. **By Roberta Cozza and others**
- "Google-Sponsored Mobile Platform Likely to Be a Market Force" — Backed by Google, The Open Handset Alliance has created an open-source Linux smartphone platform called Android that will likely be a force in the industry when it ships. **By Ken Dulaney and others**

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