

Mobile Operating Systems:

The impact of open source and importance of user experience

Worldwide Market Analysis, Strategic Outlook & Forecasts to 2013

What will the mobile OS landscape look like in 5 years?

What is the impact of open source on mobile OS?



This report will give you:

- A detailed examination of the complete mobile OS market; proprietary, advanced OS and open source
- An exclusive analysis of the impact of open source on the mobile OS market
- Expert forecasts by advanced OS by region
- An examination of the elements of User Experience

A complete insight into the entire mobile phone market including the emergence of open source and the mobile OS landscape to 2013.

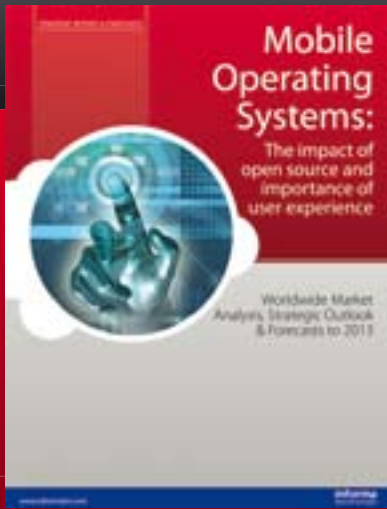
Mobile Operating Systems: The impact of open source and importance of user experience examines the entire mobile OS landscape with a focus on open architecture and open source software. It also addresses the importance of the developer community and user experience and includes key forecasts to 2013.

KEY COVERAGE IN THIS EDITION:

- ✓ The continued decline in proprietary OS market share
- ✓ Comparison of different open source software licensing models
- ✓ Examination of open source governance and business models
- ✓ The growing adoption of open source software
- ✓ The importance of the developer community
- ✓ The commoditising world of mobile handsets
- ✓ Handset differentiation
- ✓ User Experience
- ✓ Mobile OS roadmaps
- ✓ Vendors' approach to mobile OS

See inside for more on coverage in this edition

Mobile Operating System



WHO SHOULD READ THIS REPORT?

Handset Vendors

- Benefit from this complete analysis of the mobile OS landscape
- Track the current position and performance of your competitors

Operators

- Discover where your company can profit from new opportunities, current successes and potential partnerships

Consultants, Analysts and Financial Organisations

- Develop a thorough understanding of the mobile OS market over the next 5 years
- Base future investments and recommendations on unbiased, unique analysis and primary data

Device and software vendors

- Understand the business proposition and specific opportunities within it
- Identify key players, potential partners and identify current and evolving roles in the service value chain
- Identify the likely winners amongst the OS platforms and the key components necessary to deliver a compelling User Experience.

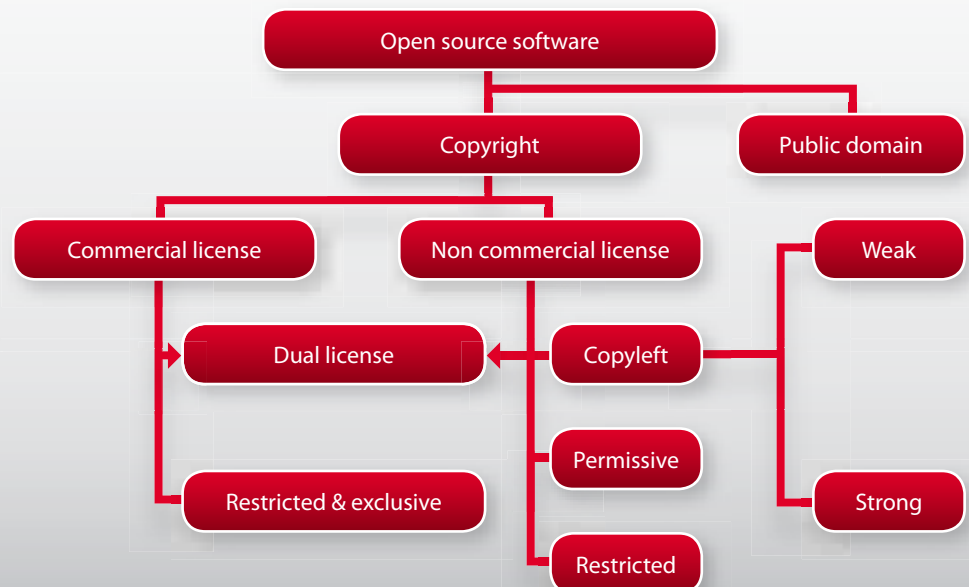
“ Open source software development is today gaining great traction within the mobile handset software space. This game changing software development method is not without its risks and limitations. However, at its optimal, it offers the means to harness the innovation and time to market advantages offered by a large community of developers, while also reducing costs. Indeed it may even help reduce the cost of handset development. ”

Gavin Byrne, Research Analyst, Informa Telecoms & Media

Revenues from the sale of mobile handsets will decrease during 2009. This will be caused not only by year on year reductions in handset shipment volumes, but also by the continued fall in the handset Average Selling Price (ASP), brought about by cost reductions, growing competition and the current economic situation. In this environment, cost reduction and cost control are paramount concerns.

Nokia's decision to change its chipset sourcing strategy in 2007 had a dramatic impact on the industry. It hastened commoditisation at the chipset level. This, coupled with the growing penetration of device hardware features, is seeing software emerge as the key enabler of differentiation, and is central to the delivery of an immersive User Experience. It also opens the device to the internet as well as other device and service ecosystems.

DIFFERENT APPROACHES OF LICENSING OPEN SOURCE SOFTWARE



Source: Informa Telecoms and Media

OS: The impact of open source and importance of

KEY FORECASTS TO 2013:

- » Total handset sales by OS type (smartphone v non-smartphone) 2008-2013 & by region
- » Total smartphone sales by OS type (open v "closed" source, semi-open v open architecture v open source) 2008-2013 & by region
- » Total smartphone sales by OS (Apple, RIM, Symbian and Symbian Foundation, Microsoft, Android, LiMo, WebOS) 2008-2013 & by region

KEY CASE STUDIES IN THIS REPORT INCLUDE:

Android
Apple
Blackberry OS
HTC
LG
LiMo
Motorola
Nokia
OHA
OS X iPhone
RIM
Samsung
SFP
Sony Ericsson
Symbian Foundation
Web OS

Informa Telecoms & Media divides the mobile OS landscape into two principal groups; proprietary OS and non-proprietary OS. This latter group is then further split into open architecture OS and open source OS.

Spurred, in part by the success of the iPhone, operators are actively seeking to reduce fragmentation in their handset portfolio and increase its revenue earning potential. This is leading operators to offer a growing number of open OS devices. At the same time, many leading mobile handset vendors are seeking to diversify their business away from pure hardware suppliers to also include revenue from applications and services, further increasing the momentum behind open OS.

Smartphone shipments, well over 160 million units in 2008, were once dominated by Symbian and Microsoft. However, today their positions are being disputed by a resurgent BlackBerry OS and new entrants like LiMo, Apple, Android and Web OS. This period of increased open OS fragmentation is also witness to the adoption of open source software components and development methods that further challenge the status quo ante.

In this environment, the choice of open OS platform is more important than ever for device vendors and operators. This choice is influenced by the company's business objectives, competitive position and capabilities. Perhaps most importantly, the company must feel confident that the chosen platform will survive the market shake out that is likely to occur. Those that succeed will have achieved the right balance between software licensing model, use of open source components, interaction with developers and a robust business model.

KEY QUESTIONS ANSWERED BY THIS REPORT:

- ✓ How will device vendors differentiate themselves?
- ✓ What is 'User Experience'?
- ✓ What are the most suitable open source licensing models for mobile handset software?
- ✓ How to succeed in an open source world
- ✓ How to make money with open source
- ✓ The challenges and risks of open source
- ✓ What are the major trends in mobile handset OS?
- ✓ Which OS platforms will be the most popular in 2009 and in 2013?
- ✓ What strategies are the leading handset vendors adopting? What does this mean?
- ✓ What is the future for proprietary OS?
- ✓ What mobile OS strategies are operators adopting?

EXPERT FORECASTS IN THIS REPORT

You need to base your business decisions on the best possible information. The Informa Telecoms & Media expert forecasting team have produced this report's forecasts. Our relationships with the key market players mean that the quality of data we publish is the most authoritative available.

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*contents correct at time of printing



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The service provides complete coverage of strategies, tactics and trends relevant to the global mobile handsets business, through a comprehensive news service, and analysis of technology, features, manufacturing trends, operating systems and key vendor strategies.

For a detailed breakdown of the content in this Intelligence Centre, visit www.intelligencecentre.net/handsets



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About the Authors



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space, from both a hardware and software perspective, with a slant towards new application convergence. His most recent piece of work covers mobile broadband devices, assessing the needs of the market for new device segments between handsets and notebook computers to satiate the consumers' need for internet access driven by the availability of high-speed mobile networks. David has also published research on future mobile handsets, mobile broadcast TV, multimedia handsets and devices, and smartphones and mobile application platforms.



Gavin Byrne works as a Research Analyst within Informa Telecoms & Media's Industry Research team. As a member of the Handsets & Devices team, he examines developments within the mobile

handset value chain, including hardware and software components, handset vendor strategy and segmentation, business models, technology and feature forecasts. Gavin has over six years' experience in research, competitive intelligence and benchmarking within the telecoms and IT sectors, he has provided comment to industry leading publications, contributed to a number of analytical newsletters and research.



Malik Kamal-Saadi acts as a Thought Leader across different sectors of the global telecommunications industry including Devices, Networks & Infrastructure, and Multimedia

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