

Mobile subscriber  
and handset  
forecasts to 2013

# FUTURE MOBILE HANDSETS



# 10

10TH EDITION

Worldwide Market Analysis, Strategic Outlook  
& Forecasts to 2013



The most authoritative  
strategic report for the global  
mobile handsets market

Now in its 10th edition, **Future Mobile Handsets is the definitive guide to the worldwide handsets market.** The report provides unrivalled coverage and in-depth analysis of mobile handset device trends, highlighting the important role they will play in supporting future generation wireless communications networks.

## NEW IN THIS EDITION:

- ✓ New forecasts to 2013 - Brazil, Russia, India and China
- ✓ Exclusive analysis of the Smartphone market
  - Impact on open source and creation of Symbian foundation
  - Growth of open source
  - Impact of Apple's developments
  - Proprietary vs Open Architecture vs Open Source
- ✓ An insight into the browser market
  - Movement towards html based web pages
- ✓ Expanded analysis - handset vendor, customer and device segmentation
- ✓ Segmentation by:
  - Consumer - by lifestyle
  - Product - by technology, by handset ASP
  - Handset vendor - by consumer, by device portfolio
- ✓ Analysis and forecasts for upcoming device types - including MIDs
- ✓ New company profiles
- ✓ New Case studies
- ✓ Handset manufacturing and process production - key analysis, approaches and trends
- ✓ SDR - Software Defined Radio
- ✓ Exclusive 2008 Industry survey results

See inside for more new coverage

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## KEY DATA AND FORECASTS TO 2013

### Mobile handset market analysis

Global mobile handset sales, by region and technology  
North America mobile handset sales, by technology group  
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- by technology group

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East Europe mobile handset sales, by technology group  
Africa and the Middle East mobile handset sales, by technology group

Africa mobile handset sales, by technology group  
Middle East mobile handset sales, by technology group

### Mobile handset market analysis by technology

Global mobile handset sales, by technology group  
Global mobile handset sales, by technology family  
Global GSM family mobile handset sales, by technology

“ A key factor for success in today's mobile handset industry is having a broad, balanced product portfolio. Cost control must also be a theme running throughout the complete lifecycle of a mobile handset, from the product development and design stages, through to discontinuation. Increasing competition, the desire to sell greater volumes at the low end, and the reducing costs of technologies has begun to erode average selling prices. In light of this, the leading handset vendors are now looking to revise their business models, seeking to diversify their revenue streams.”

David McQueen, Principal Analyst, Informa Telecoms & Media

**Future Mobile Handsets** provides a detailed evaluation of how players need to tackle key industry challenges across each link in the technology value chain. The report includes a comprehensive analysis of markets across the world and technology evolution, with detailed forecasts for 2.5G, 3G and now 3.5G and 3.9G handsets to 2013.

**The report contains extensive market segmentation analysis and also provides in-depth discussions of the industry's key issues, including:**

- Manufacturing trends
- The importance of brand
- Distribution and retail strategies

### THIS EDITION WILL GIVE YOU:

- **In-depth analysis** of advances in hardware technology and software solutions with further granularity, comparing different competing technologies suitable for different market segments
- **Extensive and detailed forecasts** by region and by technology, along with roadmaps of industry developments throughout the technology value chain, essential for making competitive decisions over the next five years
- **Analysis and forecasts** of key feature sets, such as cameras, music, video playback and Web 2.0, and an assessment of future developments such as digital broadcasting, WLAN and WiMAX
- **Hardware technology analysis** for both wireless solutions and mobile handset devices along the value chain from component to system level
- **Detailed assessments** of cost, performance and power consumption for different technologies and devices.

## CASE STUDIES

Apple  
 Access  
 Atheros  
 Compal Communications  
 Ericsson Mobile Platform  
 Flextronics  
 Foxconn International  
 Freescale  
 HTC  
 Huawei  
 Infineon  
 Kyocera  
 LG Electronics  
 Linux OS  
 Motorola  
 NEC  
 Nokia  
 Qualcomm  
 Samsung  
 Sony Ericsson  
 Sharp  
 ST Microelectronics  
 Texas Instruments  
 ZTE



The most trusted source for analysis, data and forecasts of the complete mobile handset value chain – relied on by decision makers.

### **New** ASP and BOM analysis

This edition provides forecasts and a granular analysis of the BOM and ASP by market segment from basic phones to smartphones and by wireless technology. The report also provides analysis and forecasts for minimum BOM and minimum selling prices for different categories of devices.

### **New** Single Chip market development

Semiconductor technology and the evolution of single-chip design are allowing device makers to lower the cost of their devices whilst enabling additional features and functionalities. The report assesses single-chip market development and deployment in different segments of the market from ultra-low-cost handsets through to smartphones.

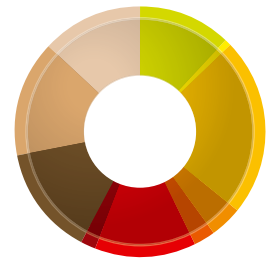
### **New** Digital radio technology

Digitising radio functions is currently enabling a number of wireless modes and baseband frequencies to be integrated in a single die, which dramatically reduces the cost of the handset, its power consumption and its form factor. This edition provides detailed analysis of the technology in the context of the mobile handset market and discusses strategies of leading solution providers.

## NEW EXCLUSIVE 2008 INDUSTRY SURVEY

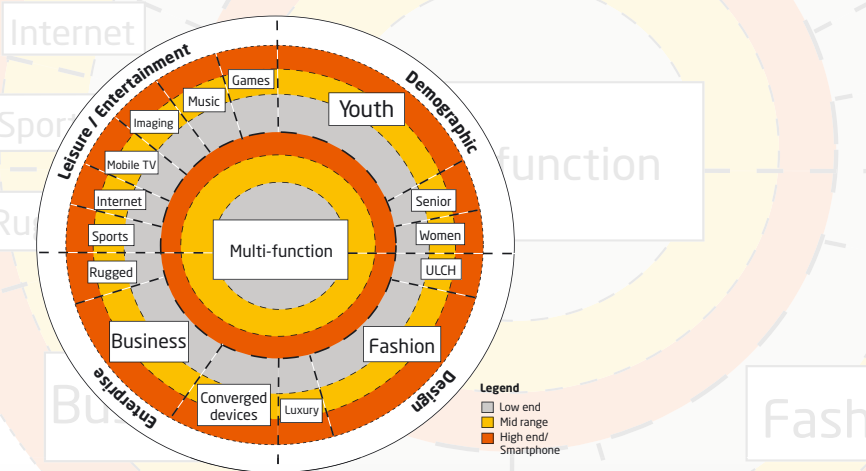
Future Mobile Handsets 10th edition includes the results of a survey amongst key global vendors and operators. The results of the survey are integrated throughout the report, ensuring that the information you receive is entirely unbiased and based on current industry opinion.

### Primary activity of 2008 Industry survey respondents



Handset Vendor	12%
Contract Handset Manufacturer/ODM/EMS	1%
Telecoms Service Provider / Mobile Operator	23%
Semiconductor Vendor	4%
Other Handset Component Manufacturer	3%
Handset Software Vendor	13%
Wireless Infrastructure Vendor	2%
Application Developer / Content Provider	14%
Consultant / Analyst / Finance / Press	15%

### Mobile handset segmentation by consumer lifestyle



Global HSDPA mobile handset sales, by region  
 Global CDMA family mobile handset sales, by technology  
 Global EV-DO/A mobile handset sales, by region

#### Replacement handset markets

Global replacement handset sales in year as a percentage of total handset sales, by region  
 Global mobile handset sales, by technology segmentation

#### Future technology segmentation

Evolving mobile handset segmentation, 2002-2013  
 Global mobile subscriber distribution by device ASP, 2007-2013  
 Global handset features penetration, 2001-2013  
 Global cameraphone sales  
 Global mobile video handset sales  
 Global broadcast TV handsets sales, by technology  
 Global mobile music (MP3/ACC) handset sales

Global mobile Java handset sales  
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 Global mobile Flash Lite handset sales  
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Global open OS handset sales, by OS type  
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 Global mobile handset sales by feature set segment and by RAM memory footprint  
 Global mobile handset sales by feature set segment and the number of colours supported in the display  
 Global mobile handset sales by feature set segment and display resolution

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# WHO SHOULD READ THIS REPORT?



## Handset Vendors

- Benefit from this complete analysis of the global mobile handset market
- Investigate new technologies and revenue streams
- Track the current position and performance of your competitors

## Operators

- Understand how the mobile handset market is developing
- Discover where your company can profit from new opportunities, current successes and potential partnerships

## Component Manufacturers

- Use detailed forecasts for handset components to drive your business forward
- Base future decisions on accurate data and independent analysis from leading industry experts

## Application and Content Providers

- Gain an unparalleled understanding of how mobile technologies and handsets will develop
- Assess the impact that this will have on the services you currently provide, and those you may offer in the future

## Consultants, Analysts and Financial Organisations

- Develop a thorough understanding of the global mobile handset value chain
- Base future investments and recommendations on unbiased, unique analysis and primary data

## Key questions answered by this report:

- What are the key network technologies and how are they being implemented globally?
- What size is the addressable market?
- How large is the market for handset sales?
- What are the major trends in handsets?
- What are the key handset segment strategies?
- What are the key handset features?
- Who are the major players in the handsets value chain and what are the successful strategies?
- How much of the market will smartphones account for?
- What is the effect of open source on the mobile terminal software industry?
- What key hardware and software trends will shape the industry?
- What are the future trends in handset ASPs and cost?

# ABOUT THE AUTHORS

## David McQueen



David McQueen is a Principal Analyst at Informa Telecoms & Media with a key focus on mobile device developments and vendor strategies worldwide. In his role David is responsible for Informa Telecoms and Media's thought leadership in the handsets and devices space, from both a hardware and software perspective, with a slant towards new application convergence. Recent work includes 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 mobile broadcast TV, multimedia handsets and devices, and smartphones and mobile application platforms. David has considerable experience in the telecoms research and consulting sector and has gained first hand experience in the handset markets' needs and requirements. He is a frequent speaker and chair at international conferences and has made many presentations on current trends and future development of mobile handsets and devices. He also provides timely analysis and comment on the devices market, and is often quoted in the global business press.

## Gavin Byrne



Gavin 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's recent work includes mobile broadband devices\* which includes smartphones, MIDs, UMPCs, laptops and attachments. These diverse new device types are being encouraged by the growing availability of high speed network connectivity, via EV-DO, HSPA and WiMAX, together with the use cases they enable and the business models companies have adopted. \* *Mobile Broadband Devices: Opportunities for mobile handsets, MIDs, UMPCs and laptops*, published by Informa Telecoms & Media, July 2008.

## Malik Kamal-Saadi



As a Principal Analyst, Malik provides thought leadership across different sectors of the global telecommunications industry including Devices, Networks & Infrastructure, and Multimedia Services. He has planned, authored and co-authored many Informa Telecoms & Media series of reports including Future Mobile Handsets, Mobile Applications Platforms & Operating Systems, Mobile Broadband Networks, Mobile Access at Home, Mobile VoIP, Open Source in Mobile, IP Multimedia Systems (IMS), Mobile Converged Devices, Mobile Computing Devices, and Metropolitan Area Networks and Switching Technologies. He has also contributed in planning the content of many of Informa events and workshops and was involved in the Telecoms Academy's Mini MBA program. Malik is a frequent speaker at international conferences on mobile telecommunications. He has over 13 years experience in the telecommunications industry as a technology expert and analyst following different technologies from inception to maturity.

Global mobile handset sales by feature set segment and battery capacity  
Global mobile battery technologies' share of handset shipments  
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