



Phone Wars II: The Software

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Our Panelists

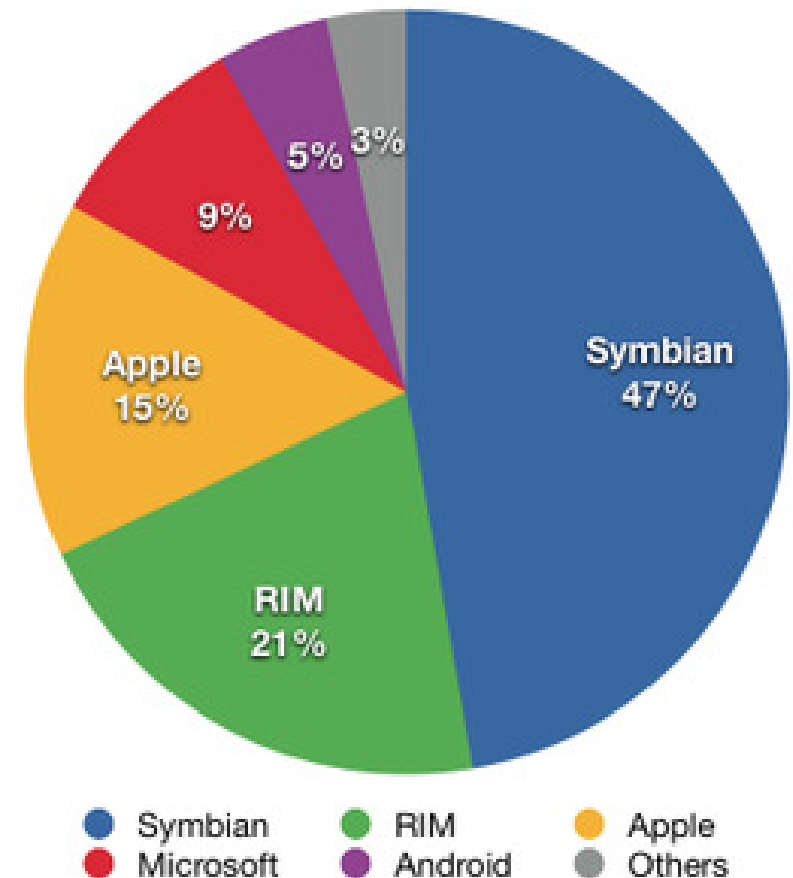
- **Daniel Kellmerein** – CEO, Detecon.
- **Angela Nicoara** – Senior Research Scientist,
Deutsche Telekom Inc., R&D Lab USA
- **Ray Milhem** – CTO, Dubai Silicon Oasis
Authority
- **Christof Wittig** – CEO, Servo Software, Inc.

Overview: Smartphone Mania

- Poll
- Smartphone Consumer Sales
- iPhone
- Android
- Win7 Mobile
- Game Over for Nokia, Palm, even RIM?
- App Developers
- The Fourth Screen
- The Cloud
- International
- Looking Ahead
- Audience Q&A

Audience Poll

- Do you own a “smartphone”?
 - Wikipedia: “a [mobile phone](#) offering advanced capabilities, often with [PC](#)-like functionality “
- What platform (now)?
 - iPhone
 - Android
 - Palm Pre
 - RIM/Blackberry
 - Windows Mobile
 - Nokia / Other



- What platform (2011)?

Market share of Smartphone operating system sales for 2009 by [Canalys](#).^[1]

Smartphone Trends - Handset

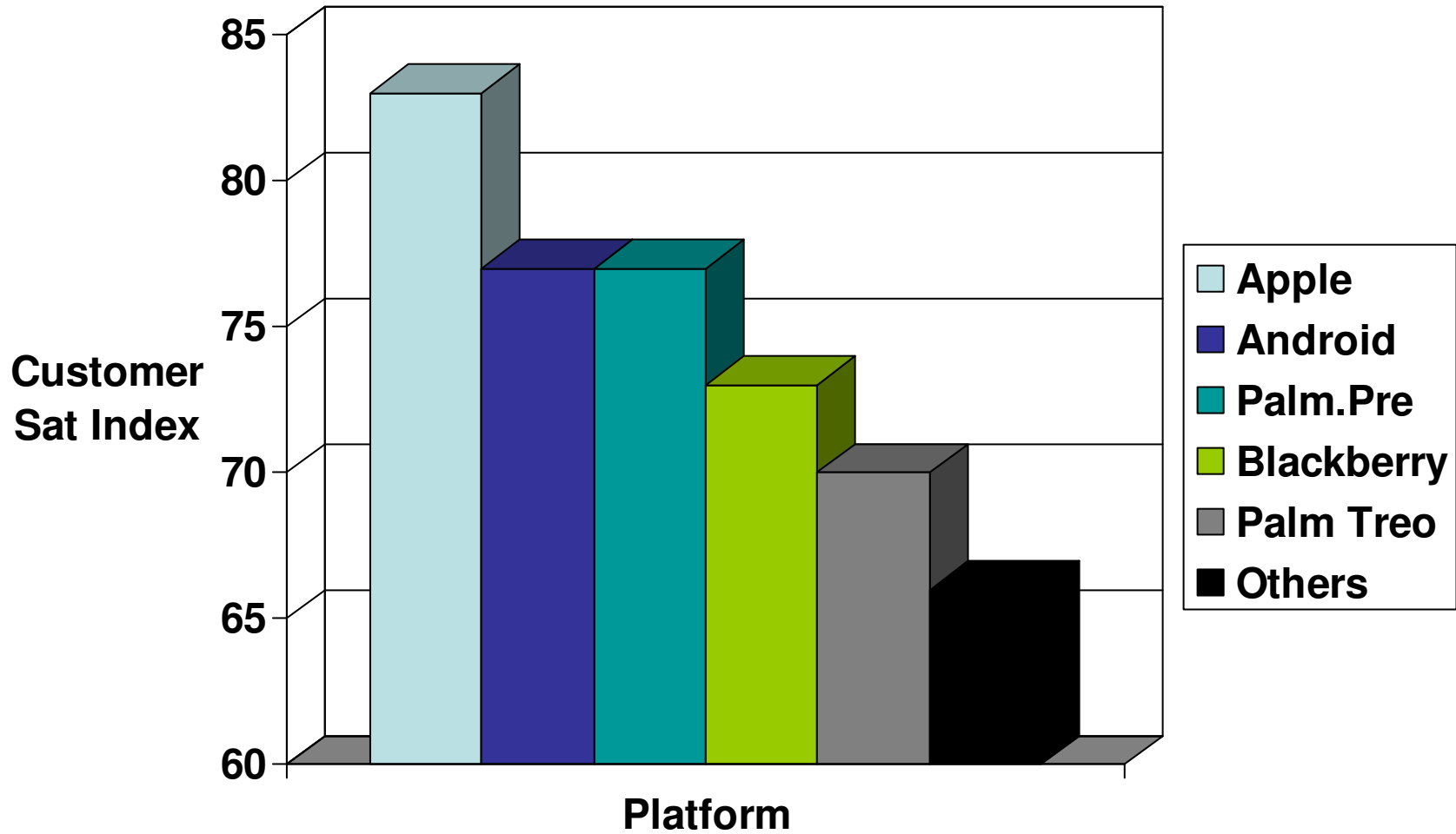
Company	4Q09 Unit Shipments	3Q09 Market Share	4Q08 Unit Shipments	4Q08 Market Share	4Q09/4Q08 Growth
Nokia	20.8	38.2%	15.1	38.5%	37.7%
Research in Motion	10.7	19.6%	7.6	19.4%	40.8%
Apple	8.7	16.0%	4.4	11.2%	97.7%
Motorola	2.5	4.6%	1.6	4.1%	56.3%
HTC	2.4	4.4%	2.2	5.6%	9.1%
Others	9.4	17.2%	8.3	21.2%	13.3%
Total	54.5	100.0%	39.2	100.0%	39.0%

Source: IDC

Smartphone Trends - Platform

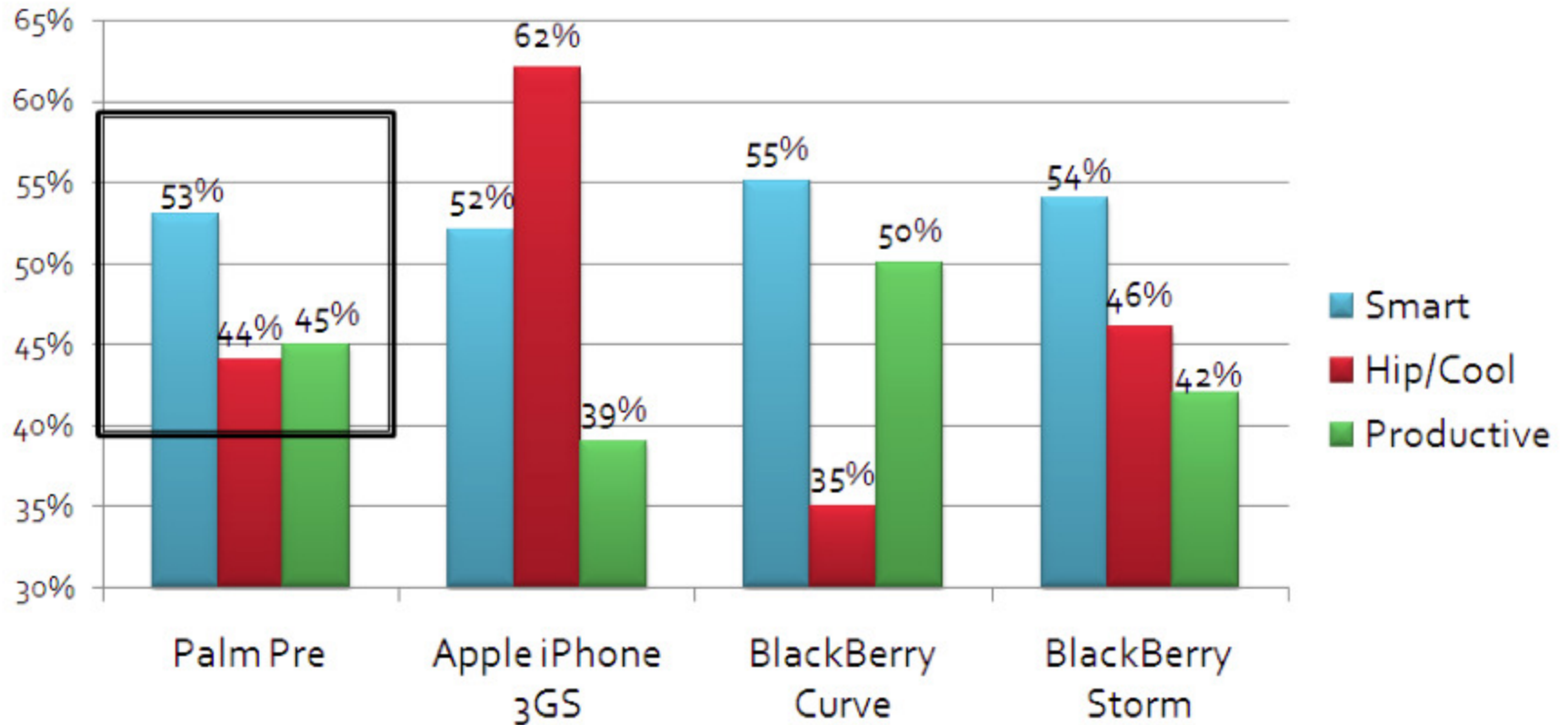
Top Smartphone Platforms 3 Month Avg. Ending Feb. 2010 vs. 3 Month Avg. Ending Nov. 2009 Total U.S. Age 13+ Source: comScore MobiLens			
	Share (%) of Smartphone Subscribers		
	Nov-09	Feb-10	Point Change
<i>Total Smartphone Subscribers</i>	100.0%	100.0%	N/A
RIM	40.8%	42.1%	1.3
Apple	25.5%	25.4%	-0.1
Microsoft	19.1%	15.1%	-4.0
Google	3.8%	9.0%	5.2
Palm	7.2%	5.4%	-1.8

Customer Satisfaction

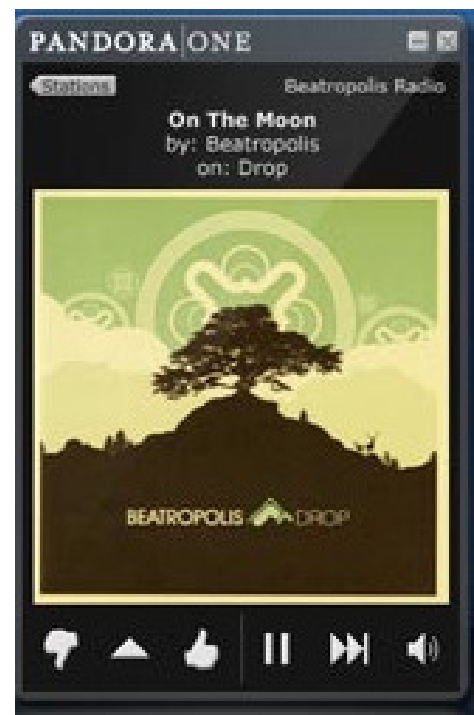


Source: CFI Group

Apple iPhone



iTunes = Tired?



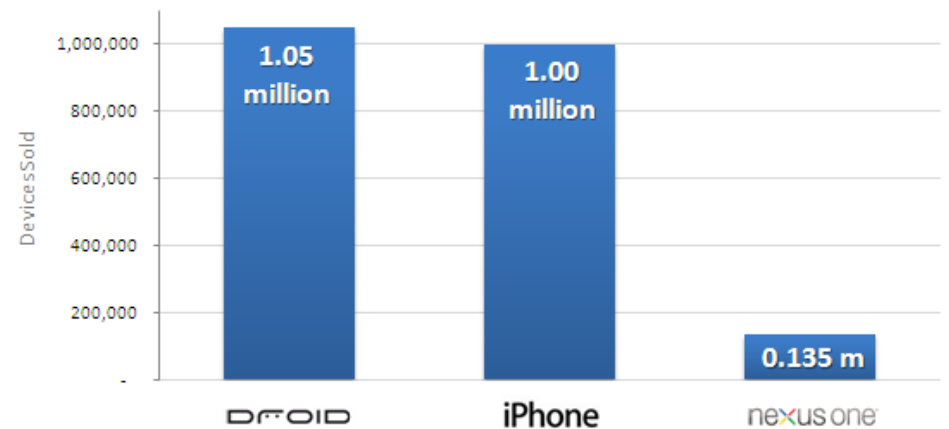
Google Android

First Week Launch Comparison

	nexus one	my Touch™	DROID	iPhone 3G S
Launch Date	Jan 5, 2010	Aug 5, 2009	Nov 5, 2009	Jun 16, 2009
# Countries	1	1	1	8
Generation	1st	1st	1st	3rd
Installed Base	0	0	0	27 million
Week 1 Sales*	20,000	60,000	250,000	1,600,000

**Estimate based on tracked new users in Flurry system, adjusted*

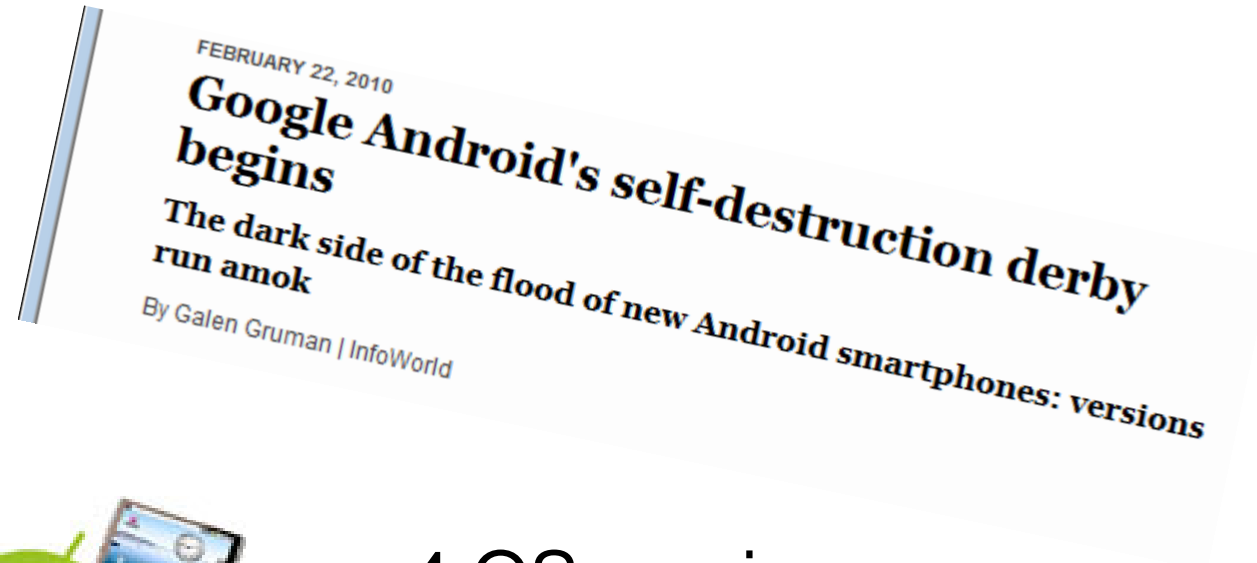
Launch Sales Comparison through Day 74



FLURRY

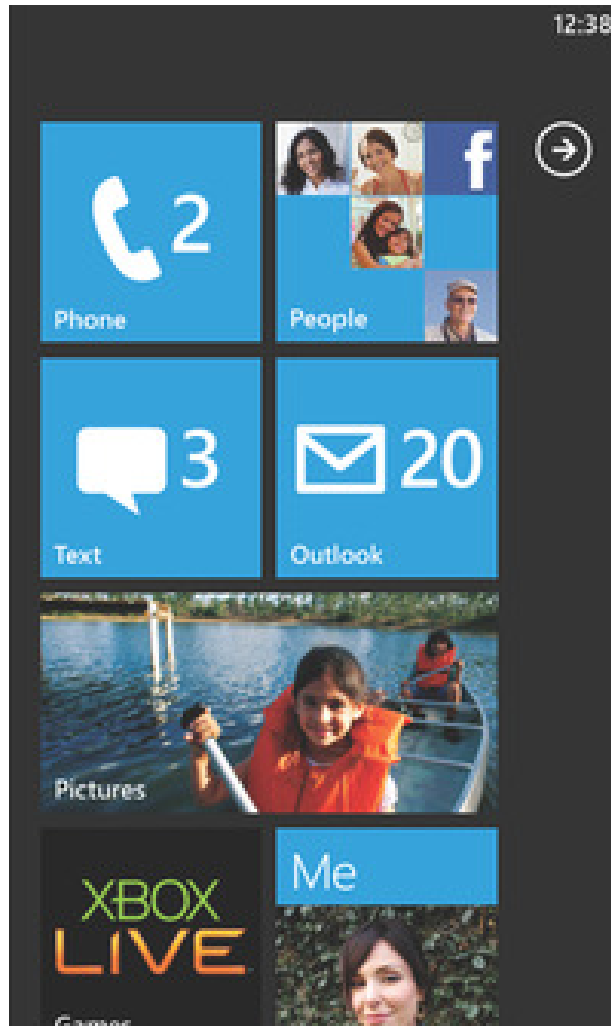
**Droid and Nexus One estimated by tracked UDIDs, adjusted for app penetration; Apple reported that it had sold 1 million iPhone 1G devices 74 days after its initial launch*

Android Device Fragmentation



4 OS versions
20 handsets

Microsoft – a comeback?



- Accelerometer
- Microsoft Location Service
- “Push” notification
- Hw accelerated video with DRM
- Smooth streaming live video
- Multitouch
- Camera/Microphone
- Shared libraries: PC, Xbox, Web

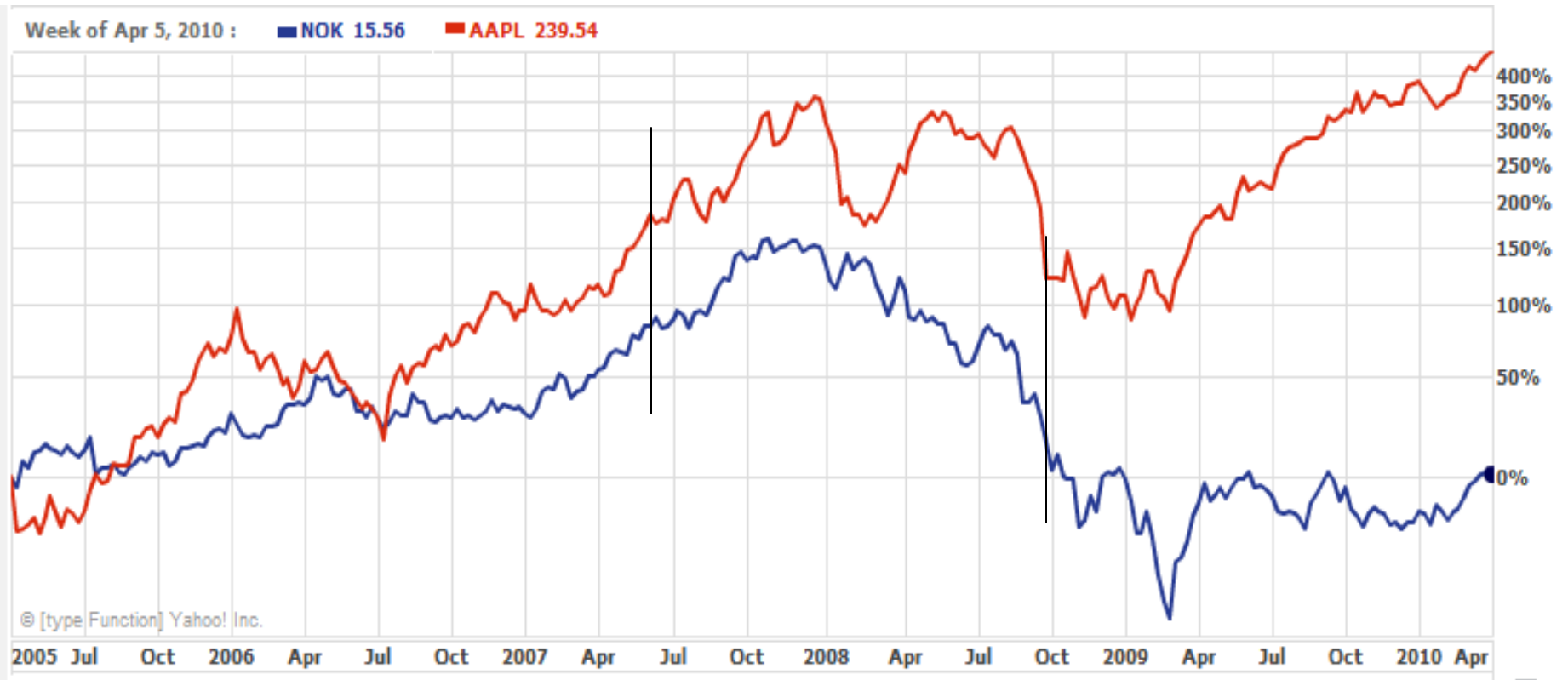
Palm: Game Over?



Source: Yahoo! Finance

Latest quarter: Shipped 960,000 smart phones, sold 408,000, 30% less than last quarter!

Nokia: Game Over?



Source: Yahoo! Finance

“does great with low-cost phones,
but smartphones are another
case”

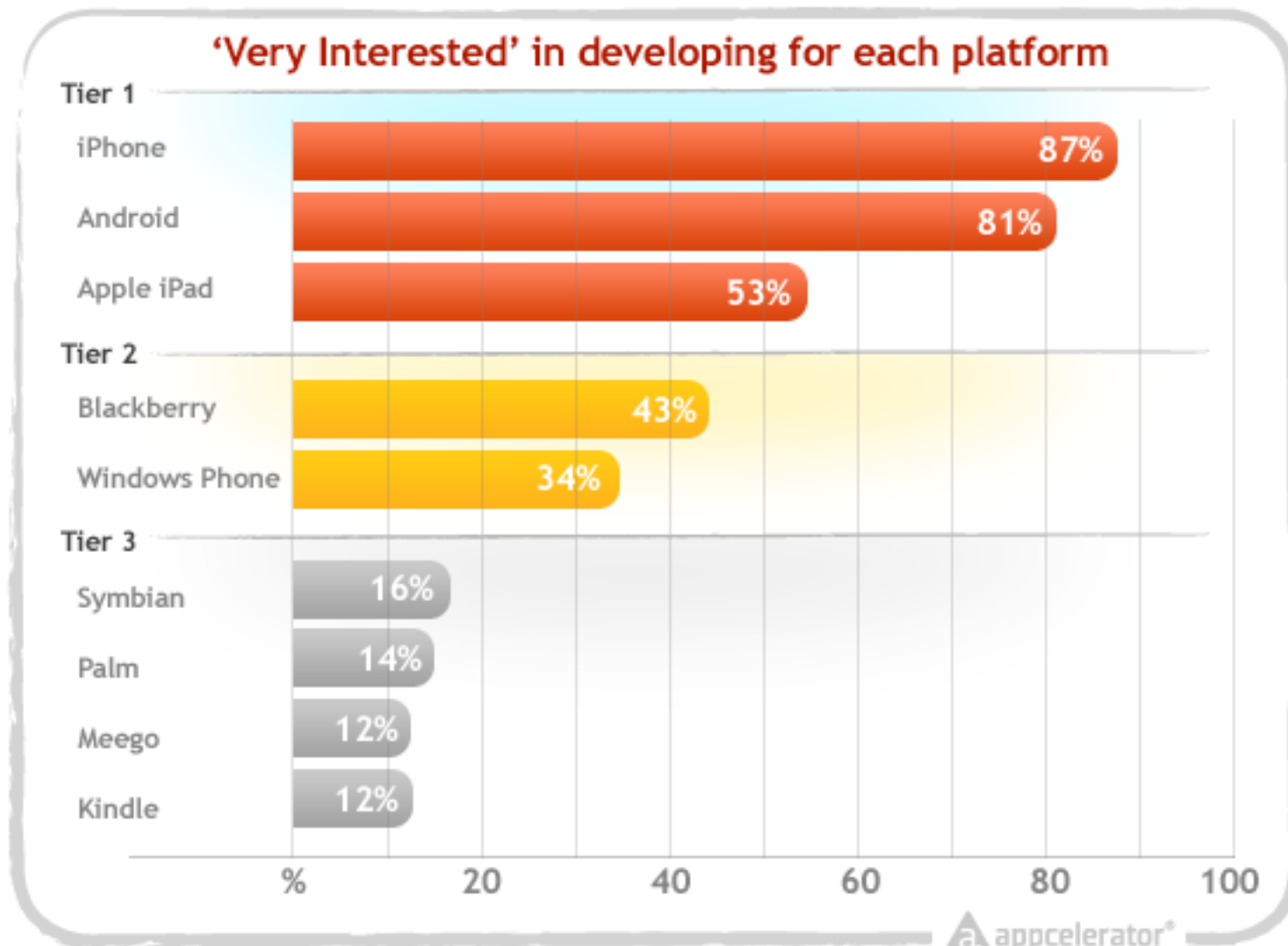
What about RIM?



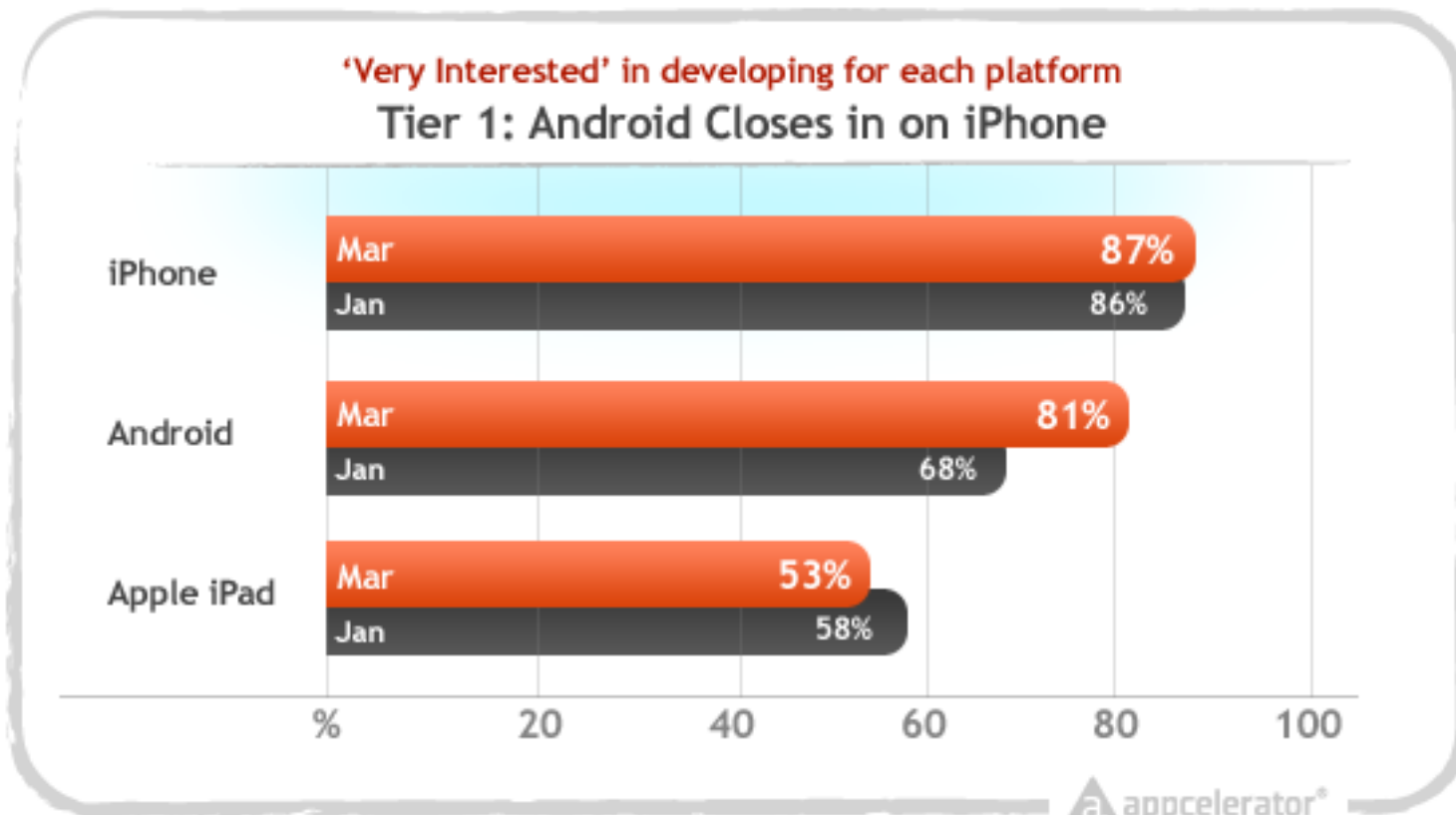
Source: Yahoo! Finance

Simona Janowski, Goldman Sachs:
“RIM’s products will increasingly lose differentiation as the focus shifts from email where RIM leads all competitors, to applications, where RIM lags both the iPhone and Android”.

The Developers



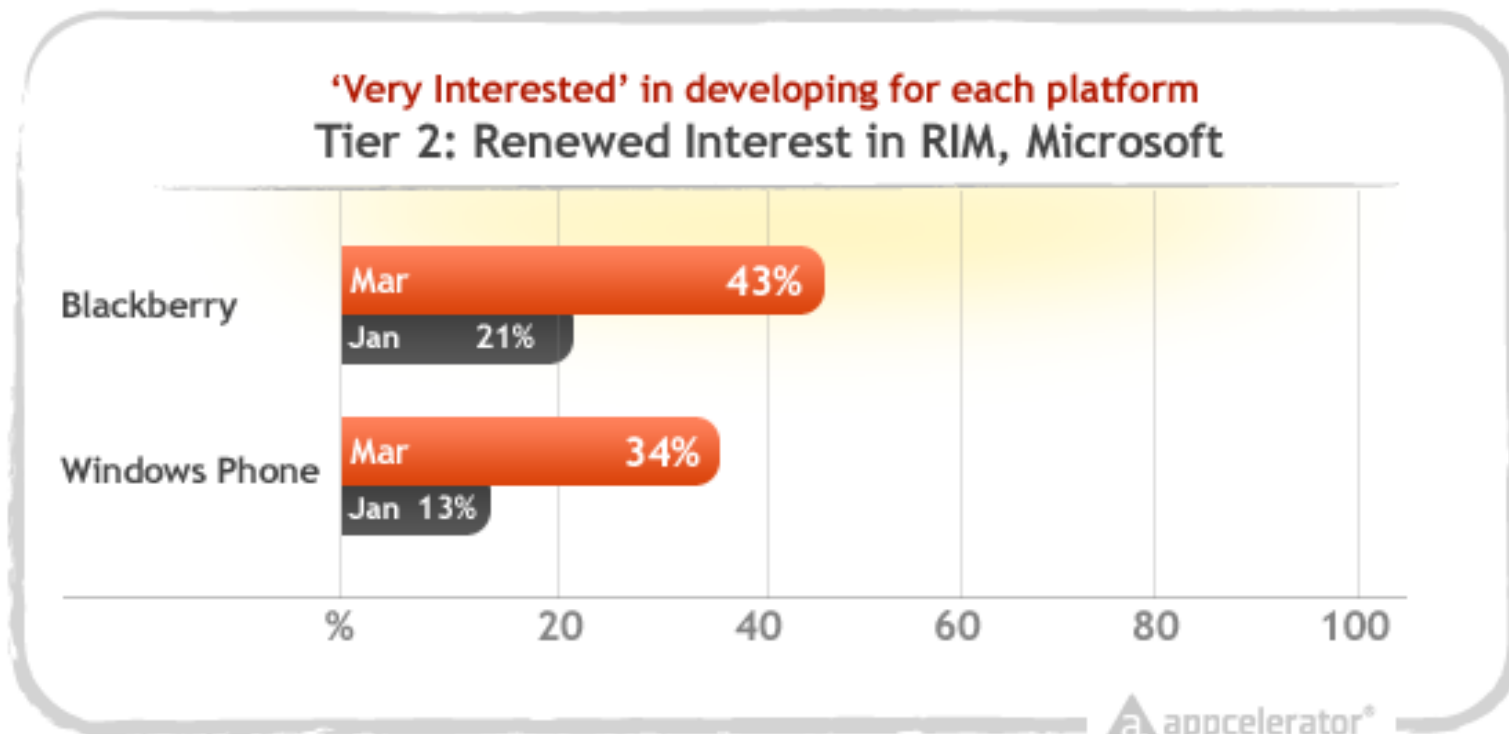
The Leaders



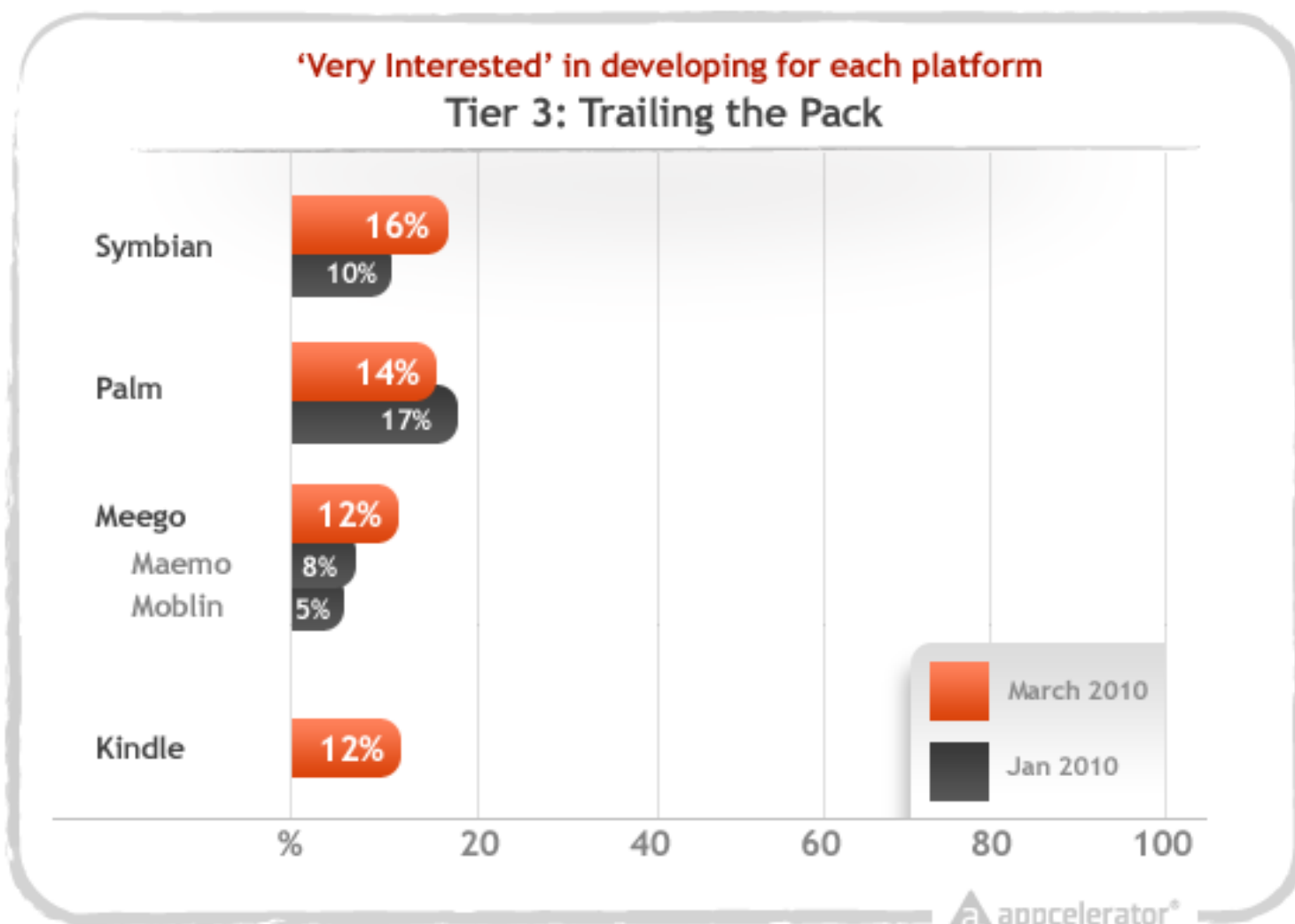
appcelerator®

Source: Appcelerator, Inc. 3/2010

Renewed Interest?



Hmm

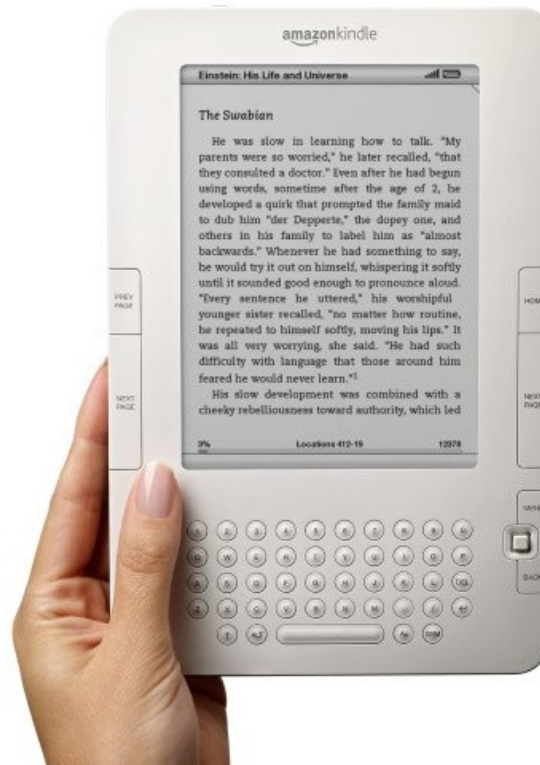


Open vs. Closed

- Open (Android)
 - Pro: no approvals
 - Con: version hell
- Closed (iPhone)
 - Pro: limited, devices, focus audience
 - Con: approvals needed



The Fourth Screen



The Cloud

- AT&T: 1M non-cell phones already connected to its network
- “Netbooks and e-readers are the low-hanging fruit”
- Pet tracking collars, pill containers, gaming devices, shipping containers



International



Looking Ahead

- Android – EVO 4G from Sprint: “the hero device”?
 - 2 cameras
 - 10 Mbps downloads
 - 4.3in touchscreen
- Apple iPhone 4G?
- Others?



Questions?



Thank You!

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