CCS Insight Team

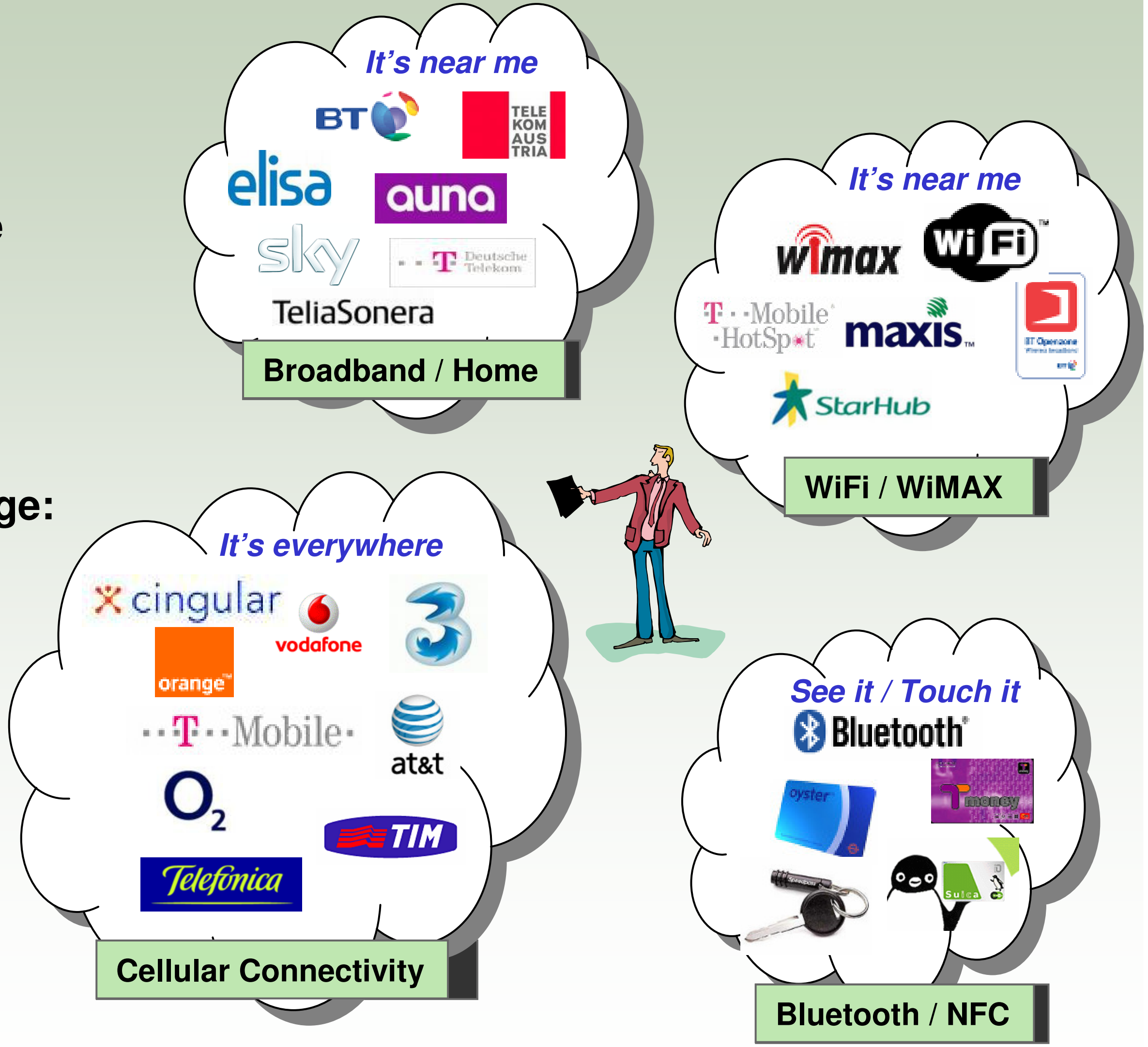
S60 Summit 07, April 25th 2007

The world is changing…

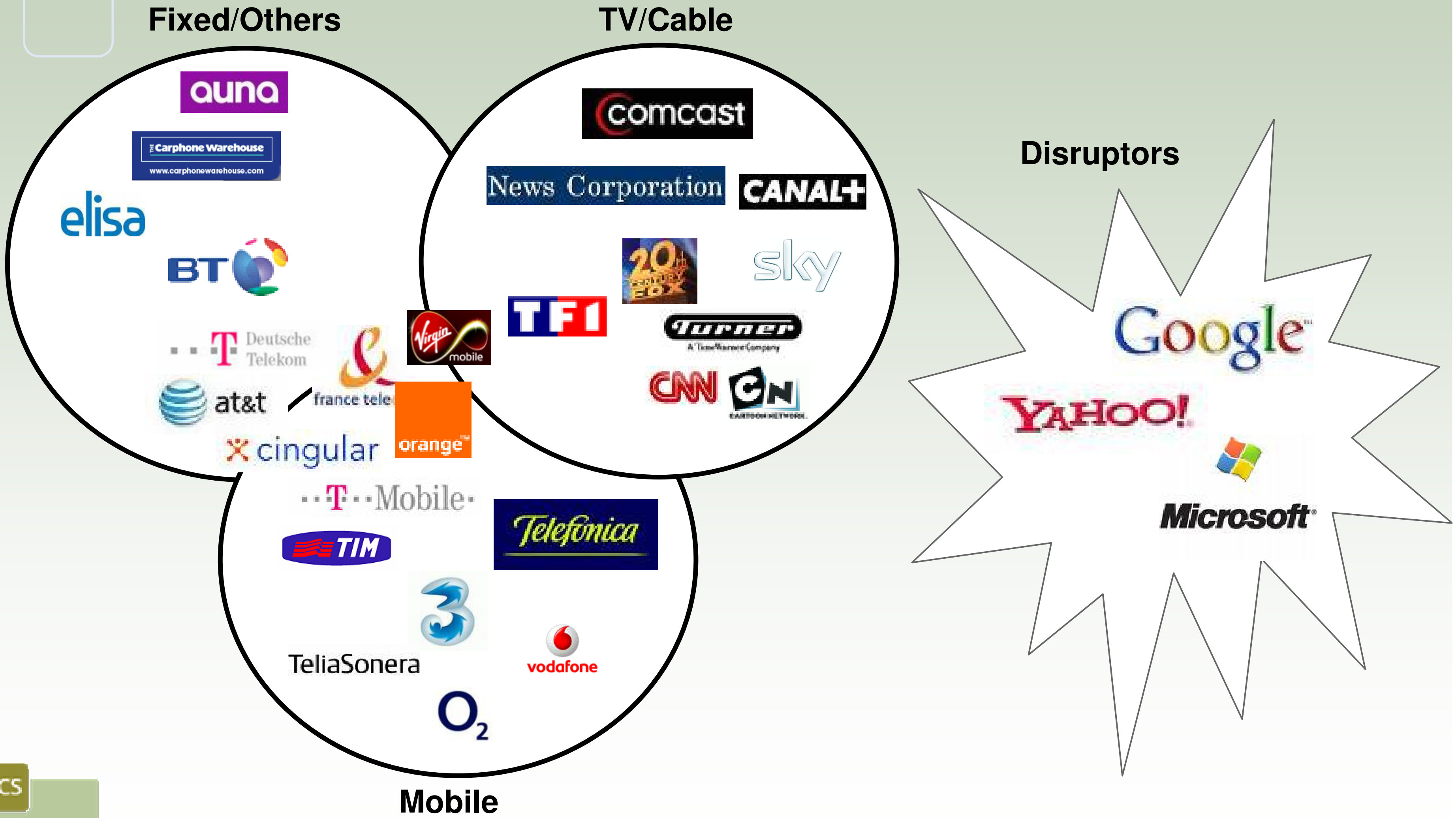
- Historically connected to "a place" not "a person"
- Entering the era of untethered communications
- Paradigm shift from voice to visual interaction with devices on the move
- New higher speed connectivity emerges
- Mobile broadband becomes technology agnostic

Surrounded by clouds of connectivity – the world gets networked

- Always connected whatever the location:
  - Home
  - Work
  - On the move
  - On the pause
- Web 2.0 business models emerge:
  - Payment
  - Advertising
  - Social networking
- New usage paradigms develop:
  - I can see it or touch it
  - It's near me
  - It's everywhere



The edges of the market are blurring…..



Targeting the four "connected horsemen of the apocalypse"

BANDWIDTH

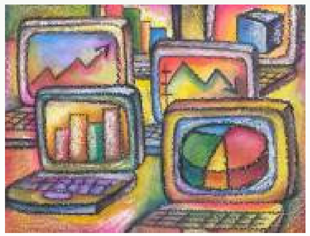
TRUST

COST

COMPELLING SERVICES

Real world challenges

- Technology matures more slowly than expected
- Technology fragmentation leads to slow adoption
- Key stakeholders (e.g. connectivity suppliers) resist partnerships and new business models
- Consumers remain conservative about new technologies and new form factors



Real world drivers

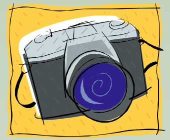
- The web giants get serious about mobility
- Compelling new services create customer "pull"
- New connectivity drives new services and business models (bypassing the mobile operators with new technology)

Proposition-led offerings emerge

Music

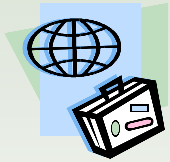
- Digital music revolution
- Streamed content e.g. Orb
- iPod generation
- Changing business models

Imaging



- Many devices with cameras
- Blogging
- Sharing experiences
- Printing

Location



- Navigation well understood
- Adds context to applications
- Offers new revenues

Gaming

- Network gaming
- Increasing capable devices (memory, display, audio)

Other applications: Search, TV, Enterprise, Connected Home etc.

Conclusions

- Affordable flat rate data tariffs will be key catalysts for applications and services uptake
- Platforms such as S60 will enable economies of scale for application developers by offering a credible business case
- An increasing number of network operators will focus on a decreasing number of software platforms
- The delivery of strong developer tools and support and the reduction in fragmentation of platforms will be a key differentiator