

THE STRATEGIC MIRROR REPORT

Mobile Operating Systems: In the era of "open" platforms

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Strategic Mirror Consulting



The State of Mobile Operating Systems: In the era of “open” platforms

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EXECUTIVE SUMMARY

- Fragmentation in the mobile handset market isn't a new phenomenon as several proprietary operating systems have come up over the years, yet there is no consolidation in sight in spite of several “open” initiatives announced by carriers and handset manufacturers.
- Over the last decade, Symbian, Microsoft, RIM and Palm led the wave of advanced mobile operating systems and smart devices.
- Apple changed the industry landscape last year by delivering a truly superior experience with the iPhone, and creating exclusive carrier alliances, and demanding a share of carrier revenues.
- Google recently joined the fray, and is well positioned to extend its brand into the mobile industry, and gain a respectable market share in the growing market for smart devices.
- While “open” certainly is the latest buzzword in the mobile operating systems industry, openness lies in the eyes of the beholder. None of these operating systems are truly open, as they all impose boundaries and constraints to limit what third party developers can do.
- The promise of “write once, run everywhere” has fallen short of expectations, even though most devices have some level of J2ME and MIDP compatibility.
- Qualcomm's BREW has had limited success in the CDMA handset market.
- This has immense implications for consumers, carriers, and application developers, as the cost to deliver compelling and scalable mobile services across multiple carriers, devices, and platforms continues to rise.
- While the market is crowded by a plethora of mobile applications and services, the barriers to gaining mainstream adoption confront companies of all sizes that want to offer a cross-carrier and a cross-device experience, and as a result, fewer applications and services have a chance to reach critical mass and becoming profitable.

KEY QUESTIONS FOR THE INDUSTRY

- What strategies should application developers and application providers adopt in this hyper-evolving market?
- How should companies prioritize and focus their limited resources in the development of mobile applications?
- Will Google gain the mindshare among mobile developers after opening up the source code of Android?
- Will Nokia regain momentum in the mainstream handset market after acquiring and making Symbian royalty free?
- How should mainstream mobile handset manufacturers such as Motorola, Samsung, LG, Sony Ericsson, Sanyo and others compete in this era of open mobile operating systems?
- What are the pros and cons of the various smart phone operating systems, and do they have a sustainable advantage?
- Should carriers offer a significant share of their service revenues to handset manufacturers in return for exclusive deals?

About Strategic Mirror Research

We offer market research and consulting services in the areas of business strategy, product development, customer analytics, forecasting, planning, launch and marketing activities.

We are developing reports on mobile industry with an eye to build a holistic view of the mobile market, and welcome opportunities to present and further our market research and to collaborate with leading players in the industry on these topics.

We help business decision makers, product managers, and marketing executives take a long term view of the market opportunity, and develop strategic insights that are critical to the success of their product and strategy development efforts, and are often not evident at 30,000 feet.

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