



Mobile Internet Value Chain:

challenges and opportunities



70's Network vs. Terminal

- Where to put voice mail
- How to activate Call Waiting



30+ Years Later

- What is the same
 - On Net
 - On Terminal

- What is different
 - Carriers
 - Terminals
 - Services
 - Service Providers



Network/Terminal Dilemma

Reach Service β à Dedicated Terminals

- Terminals' variety
 - Operating Systems
 - Interface Capabilities

- Network Complexity
 - Signing On (provisioning)
 - Charging
 - Social Responsibilities (content, access)



Mobile Internet vs. Data Access

■ Role of Mobile Internet Portal

☐ Min:

- ☐ Operator's Customer Care Services
- ☐ Operator's Information Services

☐ Mid:

- ☐ Specific Content
- ☐ Streaming channels

☐ Full:

- ☐ Channel to outside partners
- ☐ Access Promotion Vehicle



New Notion for Services

■ In the History

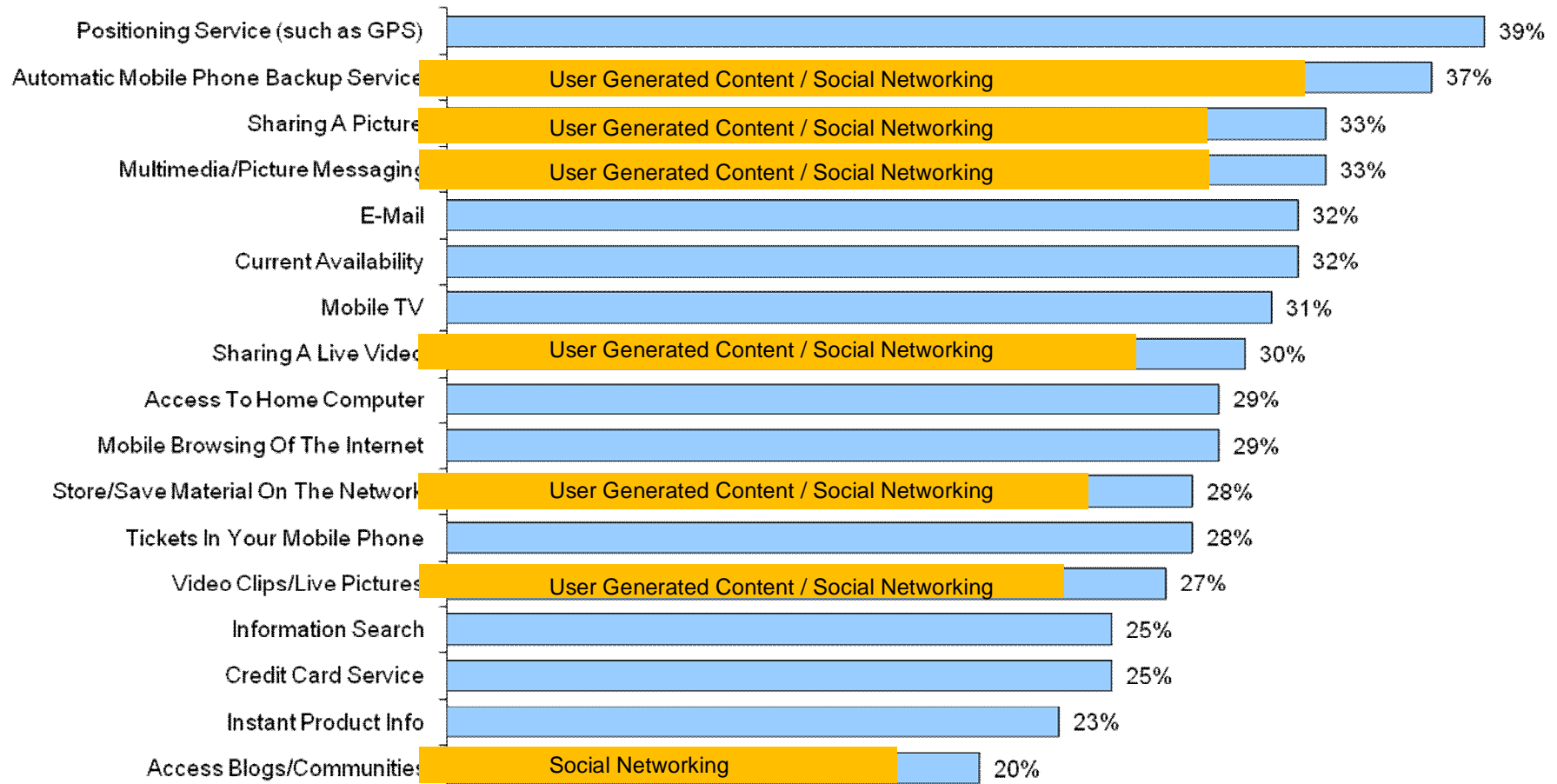
- ☐ Mobile Portal as THE MOBILE SERVICE
- ☐ Stand alone services (e.g. chats)
- ☐ Network Embedded:
 - ☐ Location Services
 - ☐ Push-To-Communicate

■ World-wide Services

- ☐ Search
- ☐ Mail
- ☐ Social Networking
- ☐ Content sharing/customer generated content
- ☐ Near-by and navigation services
- ☐ IP peer-to-peer Services (even IP voice)
- ☐ Global Information Services (news. weather, sport, ...)
- ☐ Application Stores



Consumer Interest





Value Chains

■ Customer prospective

- ☉ Unified Access to “own” Services
- ☉ Terminal Specific Interfaces
- ☉ Unified Ease to Use

■ Carrier view

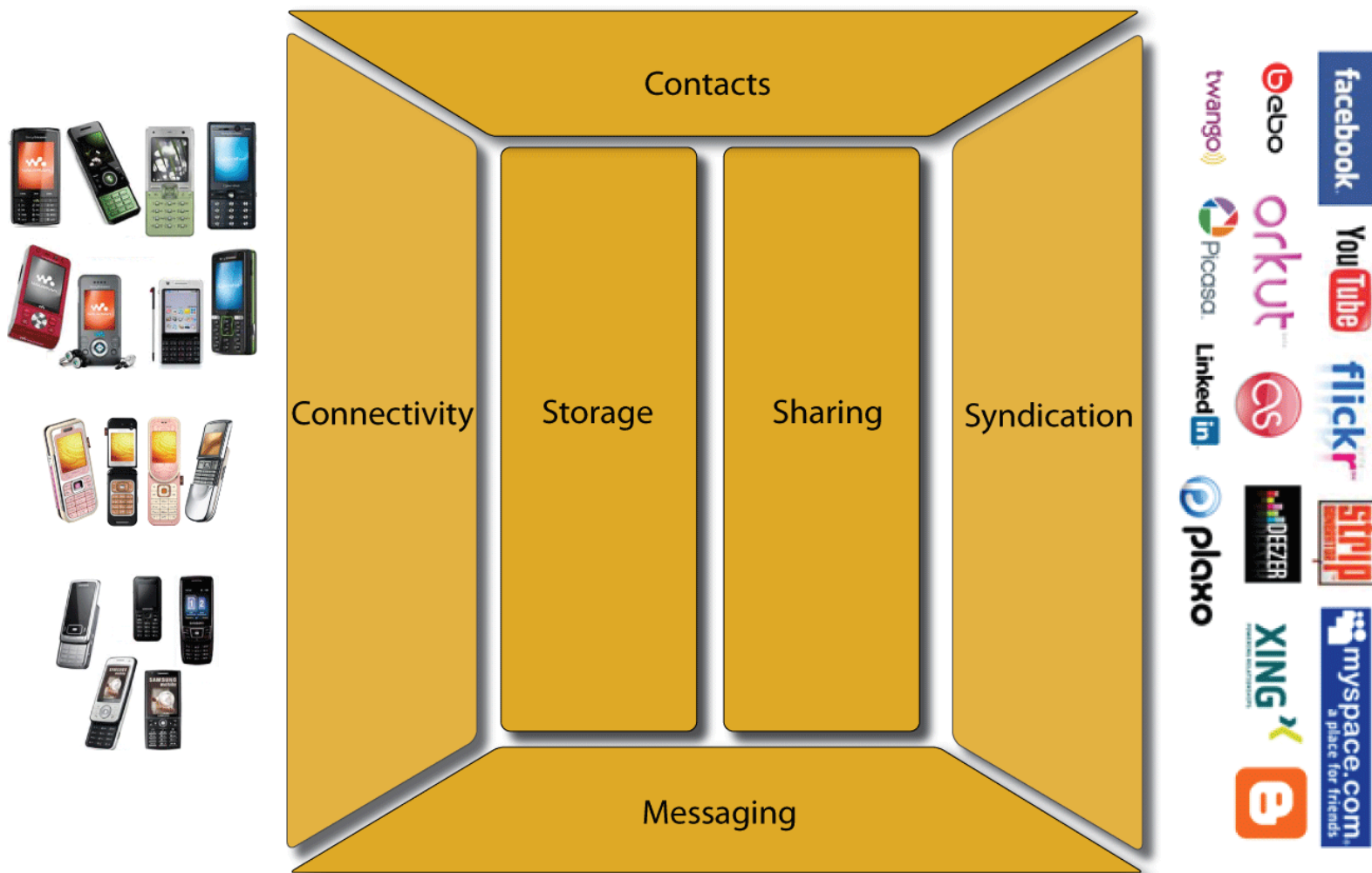
- ☉ Customers' Owner
- ☉ Service Promoter (up sale/cross sale)
- ☉ Portal Integrator
 - ☉ personalisation (*access control, service portfolio, history, bookmarks*)
 - ☉ media-like channel

■ “New Operators” view

- ☉ Globalisation & Economy of scale
- ☉ Advertisement based models
- ☉ Open standards/developer's community





Operator role in users generated content








Practical Experiences

Pipe model

-  Heavy dependence on terminals
-  Content providers need to adapt to operator's requirements

Closed castle model

-  Long-lasting integration of new channels
-  De-facto competition with fast movers (WEB 2)
-  Limited access to big brands
(for smaller operators)