



# Mobile Market Insights

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Ericsson Turkey

## Enriched Communications

Only a certain amount of what we want to say is expressed through words. This means that the current ways of communicating are not always enough to meet individuals' needs. These include the need to feel a sense of closeness and an individual's need to be in control of their communication, including how they are perceived, as well as having greater control over their communication costs. In essence, the use of communication services is evolving from making announcements to the sharing of experiences and emotions to bring a sense of "closeness" in a world where people are often far away.

People's desire to feel more in touch with their surroundings, as well as their need for greater convenience and control, is driving a change in the culture of communications. Users want to express themselves more flexibly and spontaneously; for example, when using their mobile phone. Technology's role in people's lives is also changing. Users are looking for ways of combining services such as sound, text, image, and video during a single communications session, regardless of what network they are using.

To make these kinds of simultaneous services available, you need to adapt to an environment which is IT-oriented, and collaborate with content and application developers. The services you develop need to move beyond traditional communication and take into account the new ways of communicating, as well as new and different user groups.

Users' – and especially young users' – behaviors are changing. They expect communications to be more efficient, simpler, and flexible, and they want the freedom to use multiple forms of media to get their message across. Mobility and accessibility are now taken for granted, with 85 percent of young users (aged 15 to 24) never leaving home without their phone. For youth, a mobile phone is a necessity and most keep it switched on all day. In fact, switching it off would mean cutting their links to the outside world and to each other. Peer groups, such as teens, students and couples who are highly sociable, use communication technology in order to feel a greater sense of belonging. They are content to spend their time on these activities and set a high value on remaining "in touch."

The convergence of wireline and wireless, together with different types of media, is happening now, bringing together the telecom, internet and IT worlds. All of these players are striving to define their evolving roles. Media and content developers and operators are all looking to the telecommunications service layer as their new distribution channel. All parties are evaluating how they fit into this expanded value chain. The result is a rise in competition and a shorter life-cycle at the service layer.

The business environment for multimedia services places high demands on supply-chain management, including partner management, revenue-sharing, customer management, and service management. The operator's chosen architecture and how it is implemented are critical success factors, placing increased demands on service assurance, delivery, user databases, charging systems, and so on.

The use of communications services to meet the need for closeness and control is a behavioral change that takes time. It takes time to break down existing barriers, educate and make users comfortable with new ways of communication, such as video telephony. It is important that operators begin the process of introducing new concepts and services now because diffusion takes a long time. People want to express themselves more and share their experiences, but it takes time to change their communications behaviors.

Enriched communication is driven by these user needs and behaviors, as well as the desire to be part of a community with common interests and values. Their basic desire to be in constant contact with friends and family creates demand for greater flexibility, user control and ease of use, regardless of where they are or what kind of technology is accessible at any given time.

Source: Ericsson

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## Driving Success in Video Telephony

European mobile network operators (MNOs) must take a more aggressive approach to drive the growth of video telephony (VT) revenue.

Video telephony was one of the flagship products enabled by 3G. Adoption has been modest, and promotion has taken a backseat to other services such as mobile TV and full-track music downloads.

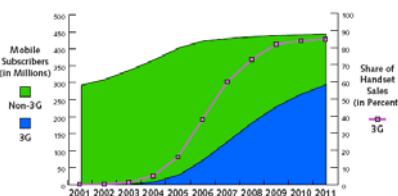
Many mobile operators are adopting a hands-off approach to VT, simply waiting for 3G penetration to increase before actively marketing the service. This is an error. MNOs can do several things to drive VT revenue today and lay the groundwork for higher adoption once the tipping point of 3G adoption has been reached:

- Encourage 3G adoption through targeted subsidies. VT penetration is tied to 3G penetration.
- Develop services other than person-to-person (P2P) mobile video telephony, such as fixed-line VT services, application-to-person (A2P) content, person-to-application (P2A) services and remote devices.

Once 3G has penetrated deeply into the subscriber base, then there is the potential for VT as a mass-market P2P service.

Video telephony is not available on 2G and 2.5G devices, so 3G penetration provides an upper limit for VT penetration. Both the calling party and the receiving party must have 3G-enabled devices.

3G Penetration in Europe  
Source: Yankee Group EMEA Mobile Market Forecast, March 2006

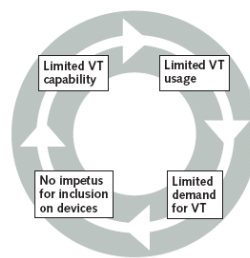


Not all 3G devices are capable of video telephony. There are some additional minimum specifications. The phone needs at least one camera for “see-what-I-see” (SWIS) functionality, which is a two-way video connection but not a true video call because at least one party’s device is not optimized (e.g., has the camera positioned wrongly). It needs either a swivel camera (to allow the camera to face the caller) or an additional frontmounted camera to allow true video telephony. Although technically a rear-mounted camera allows VT (i.e., SWIS), usability is limited and Yankee Group believes that adoption of VT by SWIS phone owners will be modest and usage limited. Video telephony requires an optimized device.

This presents a problem for mobile

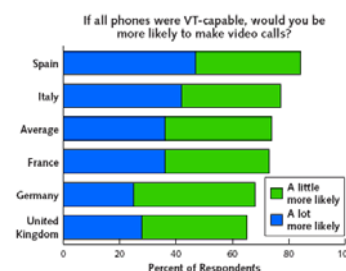
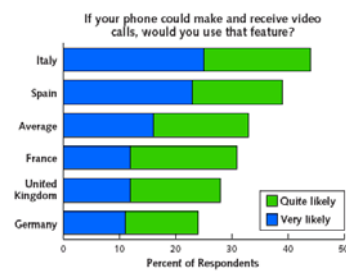
operators. It costs an additional €10 to €20 (US\$13 to US\$25) to optimize a handset for VT. This must be either absorbed by the operator as part of its handset subsidy, or passed on to the consumer. Neither option—either reducing profits or compromising competitiveness—is attractive. With video telephony representing such a modest amount of revenue, this investment does not seem justified. However, failure to invest generates a vicious circle: Low VT adoption makes MNOs less willing to further subsidize VT-optimized devices, which hinders use of the VT service.

Video Telephony Devices: The Vicious Circle  
Source: Yankee Group, 2006



VT-optimized device availability and penetration alone do not ensure service adoption. The good news for VT players is that service demand does exist. More than 30% of respondents to the Yankee Group 2006 European Mobile Multimedia Survey said they would be *very likely* or *quite likely* to use video telephony if they had access. A subsequent question attempted to define the impact of the low current penetration of VT enabled devices today. It asked respondents if they would be more likely to use VT if all phones were VT-capable. More than 70% of respondents would be more likely to use it.

User Demand for Video Telephony Services  
Source: Yankee Group 2006 European Mobile Multimedia Survey



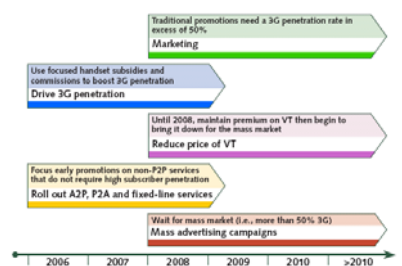
Italy and Spain scored highest in these categories. In Italy, this is probably due to the importance of 3 in the market, raising awareness of VT as a service.

Given that there is significant user demand for VT services, and that 3G VT-optimized devices will dominate the handset market by 2009, will mobile operators be content to wait for device penetration to increase before promoting VT services? This is a viable strategy because it goes with the flow of the dynamics of P2P services, waiting for penetration to reach its tipping point. Market movement suggests this is the prevailing strategy. VT promotion has been minimal in most markets, typically limited to below-the-line (BTL) marketing.

A more aggressive and pace-setting strategy focuses on building alternate usage cases for VT, overcoming the barrier of the potential calling party having no one to call. These alternate usage cases take two forms: non-P2P VT applications and mobile-to-fixed VT calling. These services generate additional revenue before the mobile penetration tipping point and nurture a latent interest in video applications, which will translate into earlier and faster adoption of mobile video telephony.

MNOs can do a lot to kick-start the video telephony market beyond simply waiting for 3G penetration to increase. While 3G penetration is increasing, MNOs should explore alternatives to mobile-to-mobile VT, which will generate revenue and spark additional user demand.

Timeline for Video Telephony  
Source: Yankee Group, 2006



Source: Yankee Group

## Mobile video: It's a Vision Thing

Mobile-video telephony is set to change the way consumers view video media and communicate. They can watch content whenever and wherever they want, while mobile-video conferencing is creating new ways to stay in touch.

Eirik Stephansen, sales manager for video telephony and messaging at Ericsson, says: "Video telephony is just beginning, and we have yet to see everything that service providers can do with it. What we see right now are two broad categories of video telephony services: person-to-person (P2P) video and person-to-content (P2C)."

P2P involves mobile-video conferencing and messaging; mobile-video conferencing ranges from mobile-to-mobile or mobile-to-PC video chatting to multi-person conference calls; and video messages can be left and delivered in a similar way as voice messages when the called party is not available. P2C includes live streams of shows and events, such as the news or sporting events, or delayed streams of content such as last week's episode of a favorite show or highlights of an event.

"Either way," says Stephansen, "we are seeing new ways to present content and use video telephony to meet consumers' needs. We are even seeing P2P and P2C merge, with the introduction of personal avatars." An avatar is a simple picture or animated character that represents the consumer.

In Hong Kong, for example, Smartone offers a service where the consumer can replace his or her video image with an avatar whose mood can be controlled by the terminal keypad. "The avatar offers the consumer an easy way to use video without showing his or her face. It lowers the threshold for consumers to start using video."

Dating services are also taking advantage of video telephony's convenience and capabilities. Participants can leave video messages of themselves for prospective dates; if interested, the prospective dates can make video calls in return.

Even watching TV becomes a richer experience: mobile TV unshackles the consumer from the TV set and can offer interactive capabilities.

The Taiwanese operator FarEasTone offers mobile TV

services where consumers can switch channels by pressing the keypad number for the "station" or stream they want. Ericsson's Channel Selector is a client software that makes it possible for the end-user to zap between mobile TV programs. It makes watching more attractive and easy as it resembles how channels are switched on traditional TV.

Stephansen says: "This is an easy-to-use service that can easily be enriched through interactivity. For example, a contest show such as Pop Idol could incorporate interactive voting into its mobile-TV stream, letting viewers react instantly to what is happening on stage.

"These are just some of the inventive ways that service providers are using our video-telephony platform to enrich consumers' communication experiences. Market research shows that consumers want mobile-video services, and, as a pioneer in mobile-video telephony, Ericsson offers a comprehensive solution so operators can provide the services their customers crave."

Source: Ericsson



## Video Telephony: Changing the Way We Communicate

Ericsson, the market leader in video telephony, says demand from young mobile users means more and more people are turning to speed phone dating.

Ericsson's expert in video telephony, Eirik Stephansen, was in New Zealand recently to talk about the opportunities it offers local telecom operators.

He says services like phone dating are revelling in the capability and convenience video telephony offers.

"Dating services, in particular, are taking advantage of the ease of video telephony. You can leave video messages for prospective dates and if interested the prospective dates just makes video calls in return - it's a far cry from having to approach someone at a bar." And it doesn't end there.

"What we see right now are three categories - person to person (seeing the person you are talking to), interactive services (like mobile blogging) and streaming services like traffic cams."

He says even watching TV on your mobile phone becomes a richer experience with interactive capabilities.

"You could be watching a contest, like New Zealand Idol, and react instantly to what is happening on stage by simply choosing a voting button which comes up on your mobile phone screen as you watch."

Stephansen says these are just some of the inventive ways service providers can use Ericsson's video telephony platform.

"We are yet to see everything that

service providers can do with video telephony. Video telephony is an important but complex service. It's worthwhile operators learning how to deliver it, how to win acceptance from end users and how to climb up the value chain based on a good mix of services."

Ericsson is a leading supplier of video gateways to telecommunications operators. Twelve mobile operators are already using Ericsson's video gateway to provide live services (like video mail, video streaming and mobile to PC calling). The majority of customers are located in Europe and the Asia-Pacific region.

Source: Ericsson



## Next Generation of TV Drives Growth

The world of television is entering a phase of accelerated evolution that can be compared with how telephony evolved with GSM.

Unlike the slow breakthrough for 3G, the move from traditional broadcasting to IMS-supported mobile TV and IPTV is unfolding rapidly.

TV viewing behavior is moving from passive to active, with consumers lured by the opportunity of deciding what to watch and when to watch it.

Ericsson is in the middle of this fast-changing world, supplying solutions to deliver content to viewers in new ways and, through its recent acquisitions and partnerships, is perfectly positioned to respond to consumers' - and their customers' - needs.

The acquisition of TANDBERG Television has been a big boost in Ericsson's fight to be a leader in interactive TV. TANDBERG

Television has already delivered 180 IPTV systems throughout the world, and has more than 2000 customers in more than 100 countries. TANDBERG Television's solutions have helped increase capabilities and efficiency throughout the digital video creation and distribution cycle.

However, partnerships are also important for success within multimedia. Ericsson and Endemol recently announced their global partnership agreement enabling interactive TV and user-generated content via Ericsson's Me-On-TV solution. Me-On-TV shows how well interactive TV can work today.

The Me-On-TV solution allows users to upload, publish and share live or pre-recorded video content via any mobile device, to any screen anywhere. Users can transmit their videos to websites, TV broadcasts, or stay in contact with friends in a community. It also allows

broadcasters, internet sites and mobile operators to directly manage live and on-demand content.

Me-On-TV was used by Endemol in the Netherlands during last year's Big Brother final, and at the beginning of September, Endemol in the Netherlands launched the Ik op TV format - which is based on Me-On-TV - on TV and the internet. Ik op TV is an interactive TV service which enables consumers to contribute live and pre-recorded content to a TV program from their mobile phones.

The multimedia arena is evolving rapidly and the consumer focus will be even more important here than in the more traditional Ericsson fields. At this year's IBC conference that took place recently in Amsterdam, the Netherlands, Ericsson showcased a number of multimedia applications.

Source: Ericsson



## Mobile Websites Made Easy

With the latest release of industry-leading mobile website tool ready.mobi, building internet sites for mobile handsets has never been easier for developers.

The tool comes from dotMobi, the consortium behind the internet address (.mobi) specifically created for mobile phones. The upgraded version, ready.mobi 2.0, now allows developers to test multiple pages within a mobile website, rather than just a single page.

By simulating a mobile website, ready.mobi evaluates the quality of a site based on its adherence to recommended best practices and industry standards. Developers receive a free report, which provides a score for each web page and an analysis of how well the site is likely to perform on mobile phones. James Pearce, CTO at dotMobi, says most good practice when building mobile websites is common sense, such as not

making the page too large or graphics too wide, and avoiding unsupported tables or formatting.

"We do have three recommendations that we strongly advise developers to follow," Pearce says. "Don't use any frames, use XHTML rather than HTML and ensure that the site works without having to type 'www' in front of the domain name."

Testing web pages on a real handset can be time consuming and expensive, so ready.mobi provides a practical tool for website development and quality assurance. Since it was first launched in November 2006, it has been used to test more than 250,000 pages of web content.

"The tool is just one of the many resources that dotMobi shares with developers of mobile sites, such as articles, tutorials and even an online mobile website

builder," Pearce says. "We are trying to demystify the process of developing a site - there is no reason why it shouldn't be as easy as building one for the PC-based web."

With thousands of developers testing web pages every day, Pearce says the mobile web is really taking off. "The quality of handsets has improved, with good screens and good browsers; we see more and more flat-rate tariffs, which makes web surfing a lot more cost effective; and, lastly, we are seeing an incredible amount of people going live with sites," he says.

"The evolution of the web to the mobile is inevitable. In the future, I expect we will look back at the early internet users sitting down at their computers to surf as very quaint."

Source: Ericsson



## Popularity of LBS Growing

The take-up of location-based services (LBS) has increased as capabilities and new features on mobile handsets have improved.

Barry McInerney, LBS Applications portfolio manager, says that consumer adoption of LBS is expected to rise within GSM markets as an installed base of GPS-enabled mobile handsets begins to take effect.

The resulting higher positioning accuracy will boost the demand for value-add services such as turn-by-turn navigation, child locator, and social networking. Services such as navigation and local proximity search for restaurants, movie theaters and hotels are becoming increasingly popular.

Mark Jefford-Baker, a market analyst for Ericsson, says that there are several developments in the mobile industry that are making LBS more attractive to new users.

"A few things have transpired to help the market grow - such as reduced prices, network speeds and increased screen size - and now

users can download information faster and see maps in greater detail because their screens are bigger," Jefford-Baker says.

Handset mapping and turn-by-turn navigation services are now entering the "discovery" mode for many subscribers in Europe, says McInerney, and the number of mobile subscribers accessing maps and downloading routes using their mobile handsets in Europe and the United States is beginning to grow.

Online maps are available in mobile services such as "show me on a map" and mobile local search. With the continued advancements in mobile phones and the entry of GPS-enabled mid-range mobiles, off-board mobile navigation is likely to become a resounding success. For much less money, consumers will have all the benefits of a portable navigation device in their mobile phone, but with the added advantage of always having the latest maps, voice directions, traffic, etc downloaded from the network.

LBS have allowed service providers and operators to tailor content based

on the user or subscriber's whereabouts. For users, this means easy-to-use services that enhance business efficiency.

"Adding local geographic information to a mobile application means end-user value is improved considerably," Jefford-Baker says. "And combining this capability with other enabling technologies, such as graphics, makes the user experience even better. These days, services can be tailored to the user's situation and this is what location-based services are all about - increased user value."

While the market is still in its early stages, a lot of work has been put into using location-based services for government and industrial applications.

"We've seen that these services are popular in South Africa and Israel, where security is an issue, but we're also seeing that the application is popular for fleet and employee location," Jefford-Baker says.

Source: Ericsson

## Who is Using Mobile TV and Why?

Whether you are on the subway, stuck at an airport, or even waiting to meet a friend, mobile TV is much more than simply traditional television on a small screen.

Ericsson has conducted a quantitative market research web study in six countries - Italy, France, the UK, South Korea, the US, and Japan - to gain more insight into mobile TV usage and behavior.

The study shows that the average consumer is a young, single male who has been using the service for less than six months. And it reveals that mobile TV consumers' needs and consumption behavior go well beyond the scheduled TV experience.

Mobile TV caters to new types of television: on-demand; interactive services; and podcasts. It is used for longer times and in more places than expected: almost 40 percent of respondents say they use it every day, from 15 to 30 minutes per day.

And mobile TV is not only for commuters; people are watching TV

on their mobile phones even at home.

Anders Källemark from Ericsson ConsumerLab says that understanding mobile TV usage and behavior - for example, appreciating that people are watching shorter sequences on mobile TV because of commuting times and interruptions - is essential when developing a successful service.

Asked about the future of mobile TV, consumers say they hope it will work much like an MP3 player: they want to be able to select a program, pause it, and then continue watching it later.

Curiosity, convenience, and passing the time while waiting or commuting are the main triggers for mobile TV consumption. People are interested in what's new, what will make their lives easier, and what content they can choose for themselves. Today, most are curious about the service, but in the future, Källemark says, it will be convenience and the need to stay up to date that will drive

consumers to tune into mobile TV.

Sixty percent of consumers said they would prefer to have content delivered on demand; in France, that number increased to 75 percent. People in the US were the most satisfied with the service, while those in Japan were the least satisfied.

Källemark says: "We need to make mobile TV even better, and one way of doing that is improving the functionality of the service. The study taught us that we need to deliver the highest quality service and make mobile TV available for everyone - as you want it and at your own convenience. The consumer decides."

Source: Ericsson

## Applications Help Businesses Grow

A trend is developing in the enterprise sector in which many companies are starting to use IP communications as a platform to help streamline business communications.

Manoj Menon, a partner with growth consulting firm Frost & Sullivan, says: "(The) enterprise (sector) is moving away from leveraging IP communications as a way to reduce and manage operational costs, and has now begun leveraging IP communications as a platform for deploying applications that help enhance business processes."

Much of this has to do with the way that business is being

done. Economies are increasingly interlinked and global. The method and speed with which people communicate have also improved, which could result in tremendous profits for the enterprise sector if it can embed improved communications in the business process.

"There are so many communications applications," Menon says. "The need now is for the major enterprise players to prioritize and integrate all of these disparate applications - such as e-mail or conferencing - so they can take advantage of this new opportunity. This is the biggest theme of unified communications, and everyone

is talking about it."

The other major trend has to do with mobility in business communications. Mobile devices have begun replacing fixed devices in the personal lives of many people, but that has not happened yet in the enterprise sector, where fixed devices still dominate.

"With a new set of applications, such as push e-mail for example, the mobile or wireless device is becoming part of our daily habits within enterprise. This is a big shift that we need to recognize and be aware of," Menon says.

Source: Ericsson



## Mobile Video Telephony Services can Reach to \$17 Billion

A new study from ABI Research predicts that the market value for mobile video telephony services will grow from \$1 billion this year to more than \$17 billion by 2012. The research firm cautions, however, that the conditions driving or inhibiting such growth depends on region-specific circumstances.

Among the services cited for growth by the study, titled "Mobile Video Communications Services," are video mail, video calling and video sharing services. The Web 2.0 phenomenon, along with sites allowing mobile video posting,

will help push demand for such services, according to a press statement made about the study by Dan Shey, principal analyst at ABI Research.

At the same time, however, growth could be inhibited by such factors as income levels, messaging and video viewing alternatives and handset capabilities. Shey also noted that there was "an uncertainty factor for operators of video services on network utilization, which will affect their promotion and pricing strategies."

The study predicts that the industrialized regions of North America, Western Europe and

Asia Pacific will command 90 percent of the world's video services revenues. For carriers operating in the developing regions of the world, where the remaining 10 percent of revenue could be realized, the best bet is to take advantage of the market for video messaging services. According to Shey, "The mobile phone is the most common device in these regions and 2.5G networks are sufficient for this service. With more people migrating and immigrating to find work, video messaging can."

Source: ABI Research



## Mobile Broadband is Becoming a Mass Market

With 128 commercial HSPA networks rolled out and more than 300 HSPA devices available around the world, mobile broadband is moving quickly toward becoming a mass market, Ericsson President and Chief Executive Officer Carl-Henric Svanberg said during the company's Strategy and Technology Summit in London.

As evidence he gave several examples where, in commercially launched HSPA networks, data traffic has quadrupled over the past year and is accelerating.

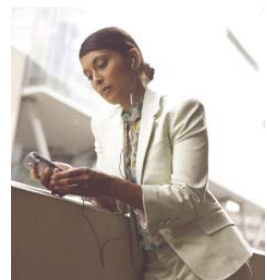
Svanberg said: "This is an exciting development in our industry. HSPA with speeds of 7.2 Mbps is now being launched, and we will see embedded modems in early 2008. This indicates that mobile broadband is already becoming part of our daily lives."

Svanberg also elaborated on the continued demand for telecommunications in developing markets in which GSM is built out for coverage and capacity and, in parallel, networks are upgraded to HSPA. Svanberg continued: "We see

clearly that the mobile phone will be essential in closing the digital divide. Mobility is a key contributor to productivity and quality of life in developing countries".

In mature markets, mobile broadband services are becoming more prominent in peoples' lives as networks become capable of delivering them. At the same time, there are major expansions in fixed broadband networks, in which intelligence is being moved toward the edge.

Source: Ericsson



## Small Chip is Big News For LBS

The development of the world's smallest GPS chip can lead to big opportunities for operators that provide location-based services: more enabled devices means more potential consumers.

Engineers in Sweden and the US have recently developed the world's smallest GPS chip, which offers all the services and functionality of chips many times its size. This will allow operators to provide more accurate location-based services as well as new services for consumers.

The chip is roughly the size of a piece of confetti (3.79x 3.59 x 0.6mm). Because of its small size the chip's developers foresee it finding its way into a multitude of electronic devices, such as mobile phones, PDAs, car navigation systems, digital cameras, MP3 players, radios, WiFi cards, Bluetooth devices and even bracelets and dog tags.

Marijana Marincic, positioning team leader at Ericsson Mobile Platforms, says: "A smaller GPS chip means it can be put into more devices, which means more consumers will have GPS-enabled devices. For operators, this is an opportunity to expand their location-based services offerings."

The chip's functions include supporting emergency calls, point-to-point navigation, real-time traffic information, an address finder, child location, find-a-friend, finding game partners, and business functions for travelers and taxi services. The reduced size, in conjunction with assisted GPS (A-GPS) technology, will enable improved location based services for consumers. A-GPS gets assistances from the mobile network or an internet based server, which greatly reduces the response time and increases the sensitivity of the GPS module. This means GPS enabled phones and other devices would be able to function where traditional GPS devices could not.

While location-based services do not depend solely on GPS, GPS can provide greater location accuracy, reduced response time and more targeted services.

Marincic explains: "With A-GPS enabled phones, consumers will be offered a vast number of new location services, such as location stamping of photos and video clips, navigation, and way finding. At the same time, already existing location services will provide much better accuracy."

For example, with a GPS-enabled

mobile, consumers can receive advertisements that are triggered by their location. As consumers are walking down a street, they can receive an ad offering a free cup of coffee at the cafe right in front of them. Whereas previous versions of this service, which used cell ID, were accurate to within only a block or two of the cafe, GPS will narrow the accuracy to a few meters

Torbjörn Lundahl, VP systems management & technology at DU Service Layer Development, agrees: "A small, inexpensive and energy-efficient GPS chip will lead to its inclusion in a lot of devices. The accuracy that GPS gives will open up a lot of new services for consumers that are today only available in expensive dedicated equipment."

Source: Ericsson



### *Ericsson Turkey*

*We are glad to share with you "Mobile Market Insights" following our Mobile Technologies Outlook publications.*

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*In each issues we will provide insights about a specific topic and telecom tidbits.*

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