

How Tablet will Transform the Landscape of ICT Industry

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Agenda

- Market Dynamics and Trends of Mobile Devices
- Transition of Mobile Device Industry Ecosystem
- Tablet to Transform the Landscape of ICT Industry

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Mobile Devices' Cross-Over Evolution

Information Centric



Macintosh Portable (1989)



Power Book (1991)



Compeq Tablet PC (2001)



Asus-Eee-PC (2007)



iPad (2010)



Pilot (1993)

Communication Centric



Motorola DynaTac (1983)



Nokia 9000 (1996)



Orange SPV (2002)



N-Gage (2003)



Motorola Music Phone (2005)



iPhone (2007)

Media Centric



Nintendo Gameboy (1989)



iPod (2001)



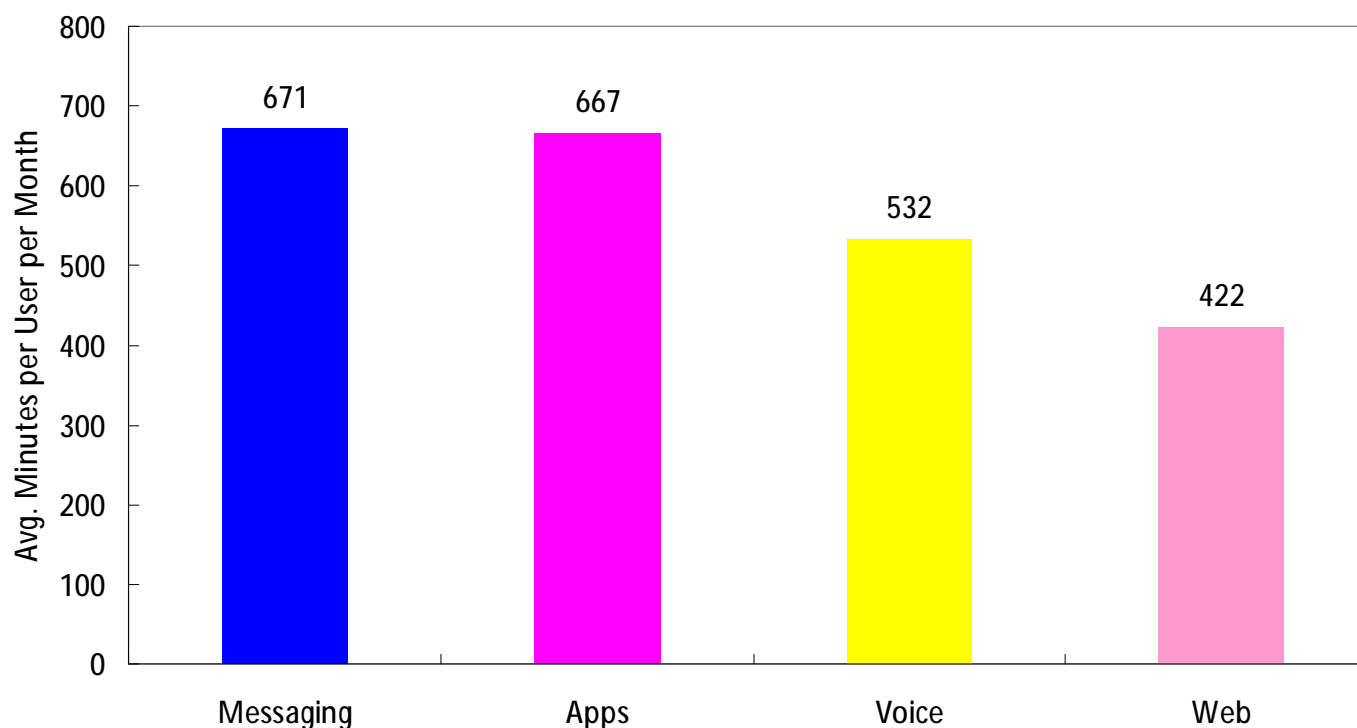
Nintendo DS (2004)



Amazon Kindle (2007)

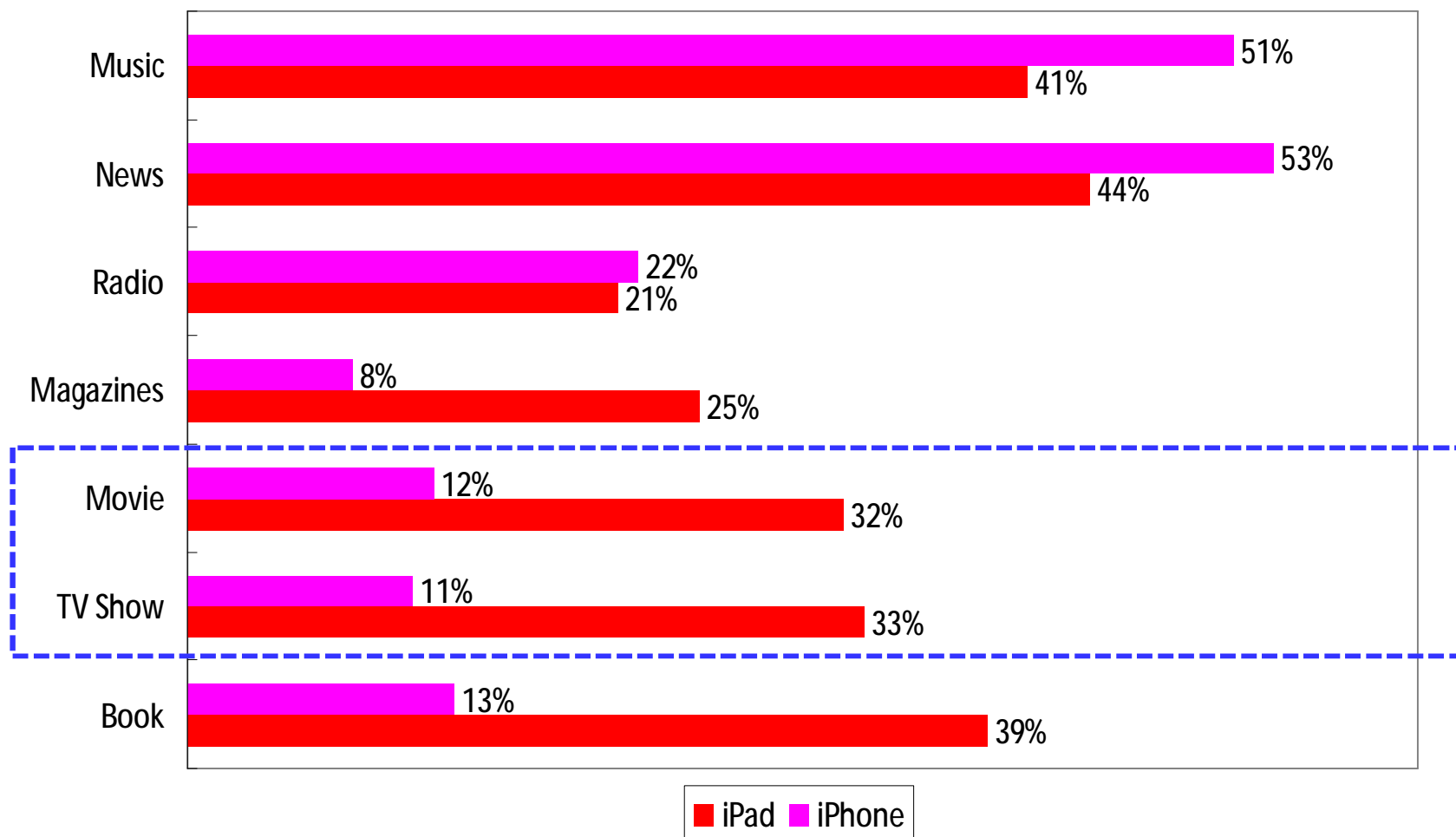
Smartphone usage: Messaging and Apps have overtaken Voice

- Mobile “phone” usage has gone beyond traditional “talk” function
 - Messaging: Text, multimedia, email, and instant messaging, etc.
 - Apps: Maps, gaming, entertainment, productivity, social networking, etc.



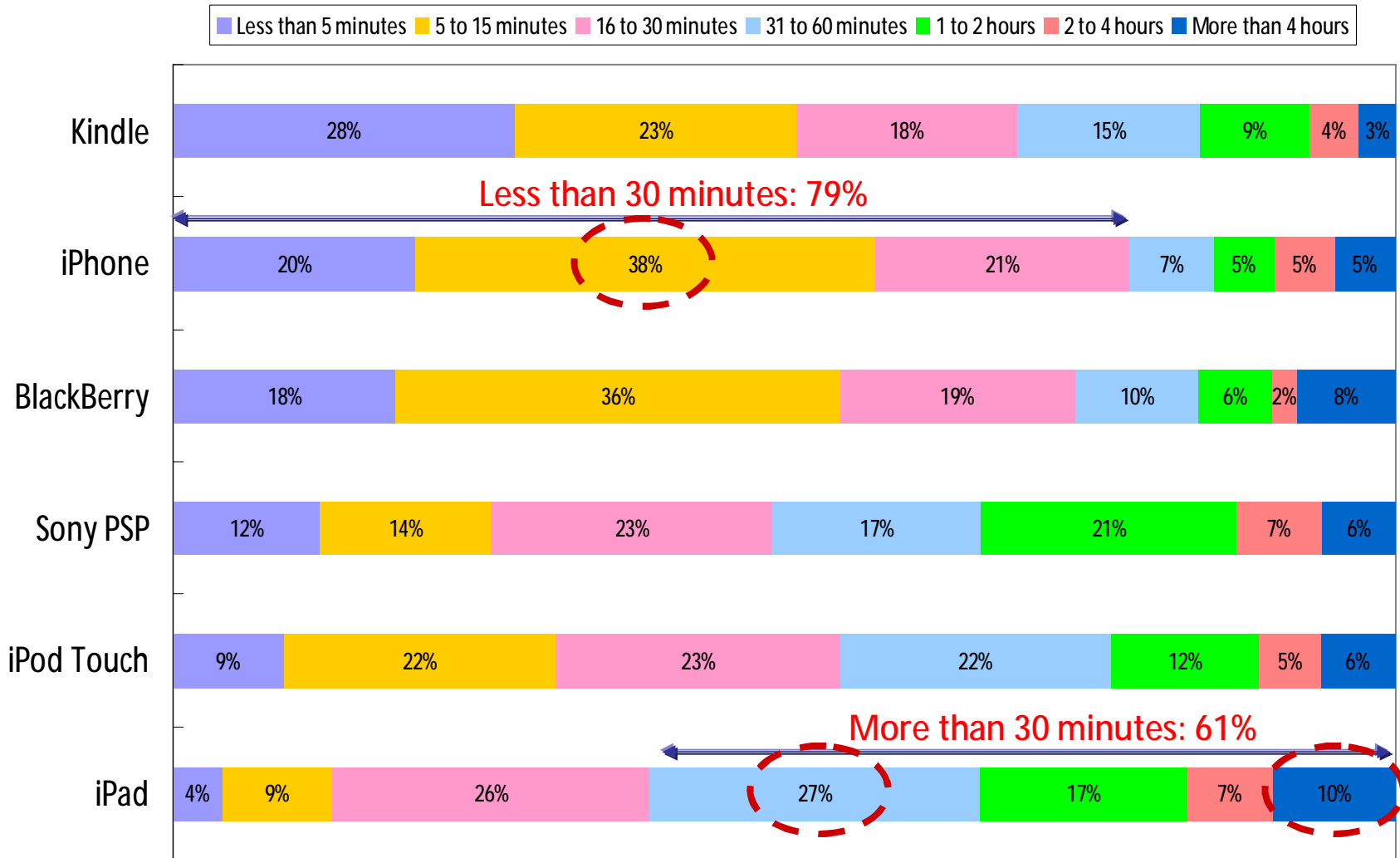
Note: Zokem's January 2011 study looked at over 2,200 smartphone users in both the U.S. and the U.K.

Non-Voice usage: Heavy media content more regularly accessed on iPad than iPhone



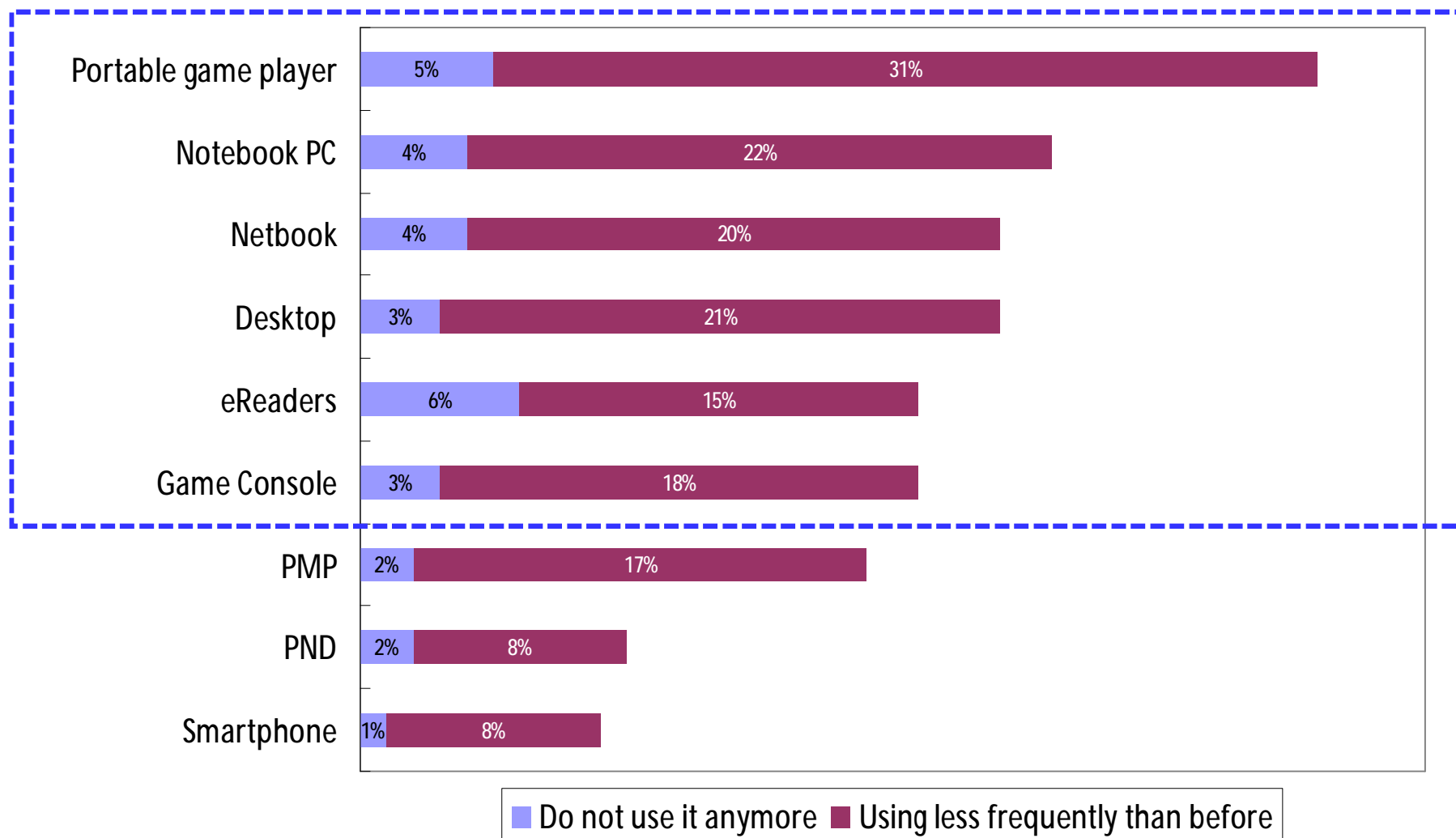
Note: Nielsen surveyed more than 5,000 connected device owners who completed an online, self-administered survey in August 2010

iPad users spend more time with media content than other devices



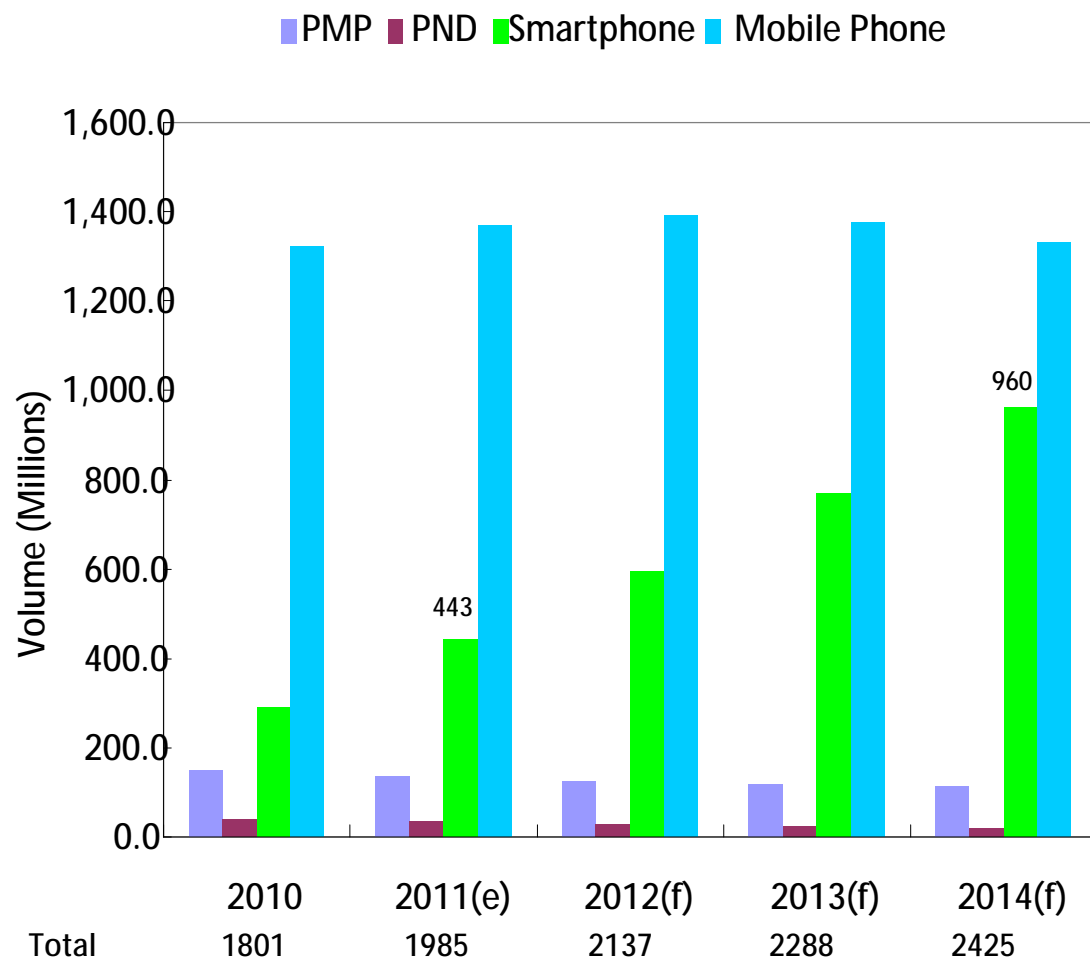
Note: Nielsen surveyed more than 5,000 connected device owners who completed an online, self-administered survey in August 2010

Users response: iPad truly affects other devices usage besides Smartphone



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Smartphone will impact the growth of Mobile phone, PMP and PND devices



Mobile Phone
 CAGR 2011-2014: 0.1%
 Communication
 2-3" Screen
 Keypad



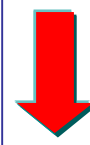
Smartphone
 CAGR 2011-2014: 27.1%
 Rich Media Content
 Communication
 3-4" Screen
 Multi-Touch/Qwerty



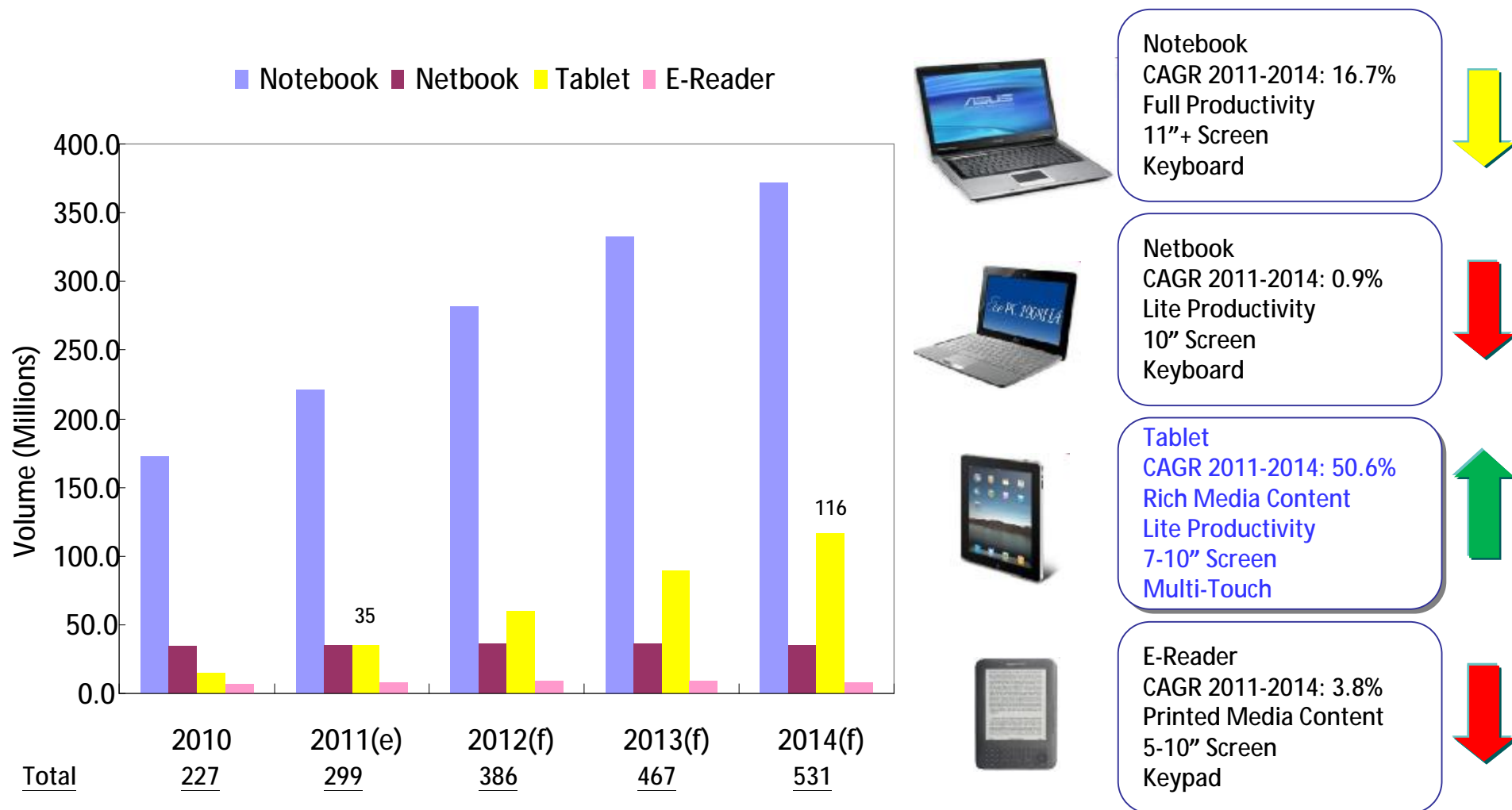
PMP
 CAGR 2011-2014: -5.0%
 Media Playback
 -4" Screen
 Keyboard



PND
 CAGR 2011-2014: -12.3%
 Navigation
 4-7" Screen
 Keyboard



Tablet will mostly affect Netbook and E-Reader while gradually impacting Notebook



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Mobile device industry from product to ecosystem

1. Telecom Equipment centric

–Voice quality competition;
Telecom equip vendors
provided network & device



2. Mobile Device Brands centric

–Device feature competition;
More device brands




3. Applications Platform centric

–Content & App. competition;
More content provides joined
the ecosystem; More companies
are seeking control content &
app

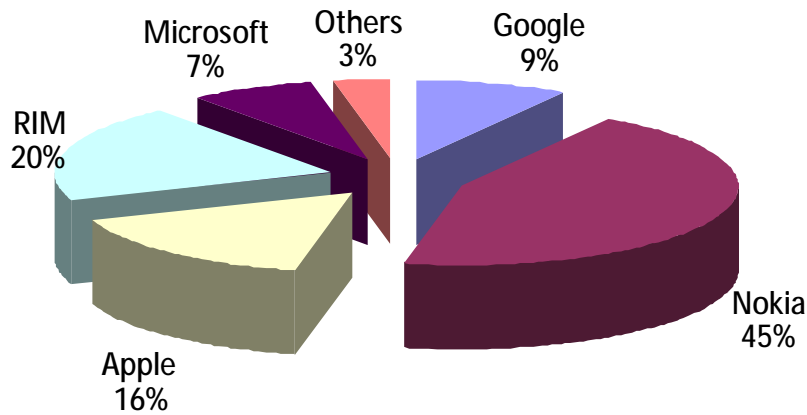


More companies are creating own ecosystem

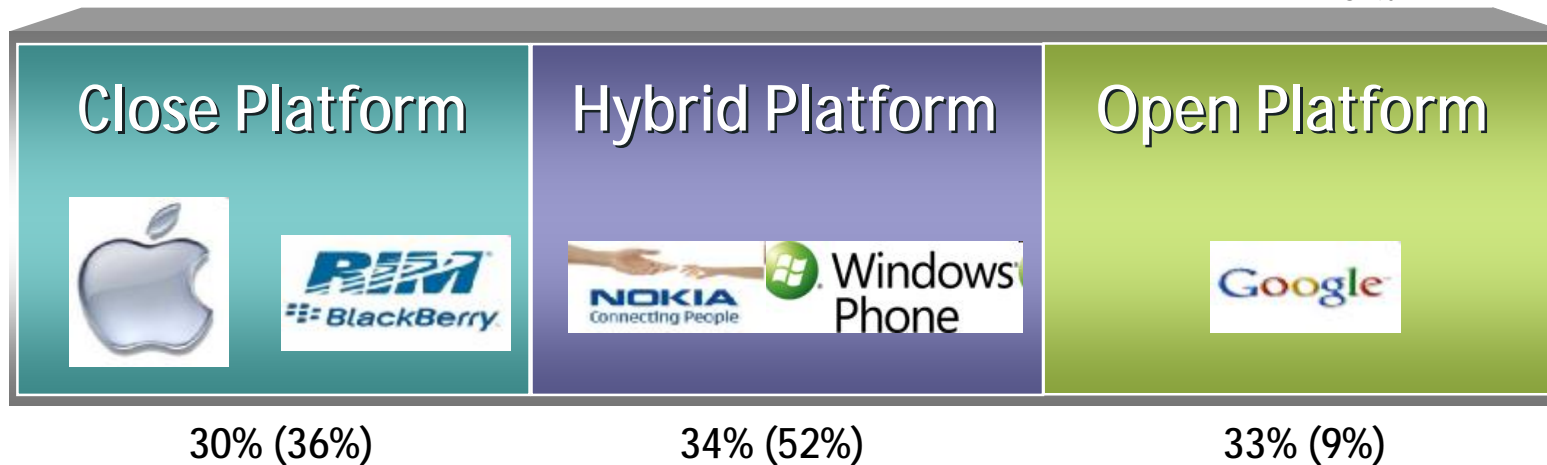
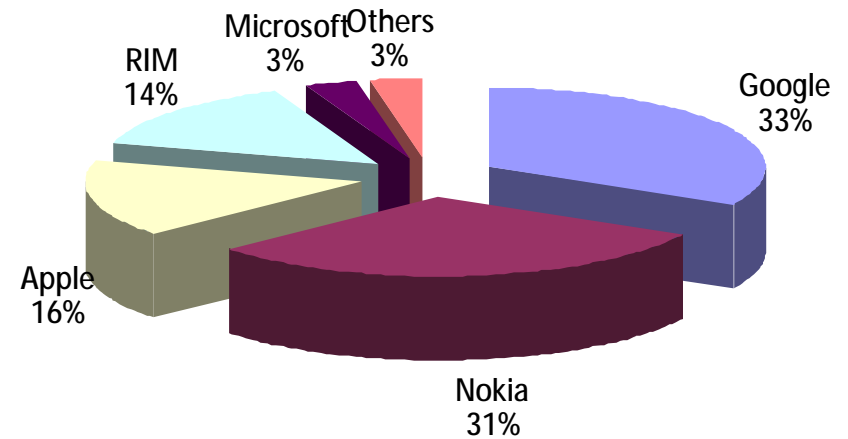
					
	Apple App Store	Blackberry App World	Nokia Ovi	Samsung Apps	Shop4apps
App Marketplace					
OS					
Smartphone					
Tablet	iPad	Playbook	?	Galaxy Tab	Xoom
					

3 types of Smartphone platforms are shaping up for ecosystem-based competition

Worldwide Smartphone OS Market Share, Q409

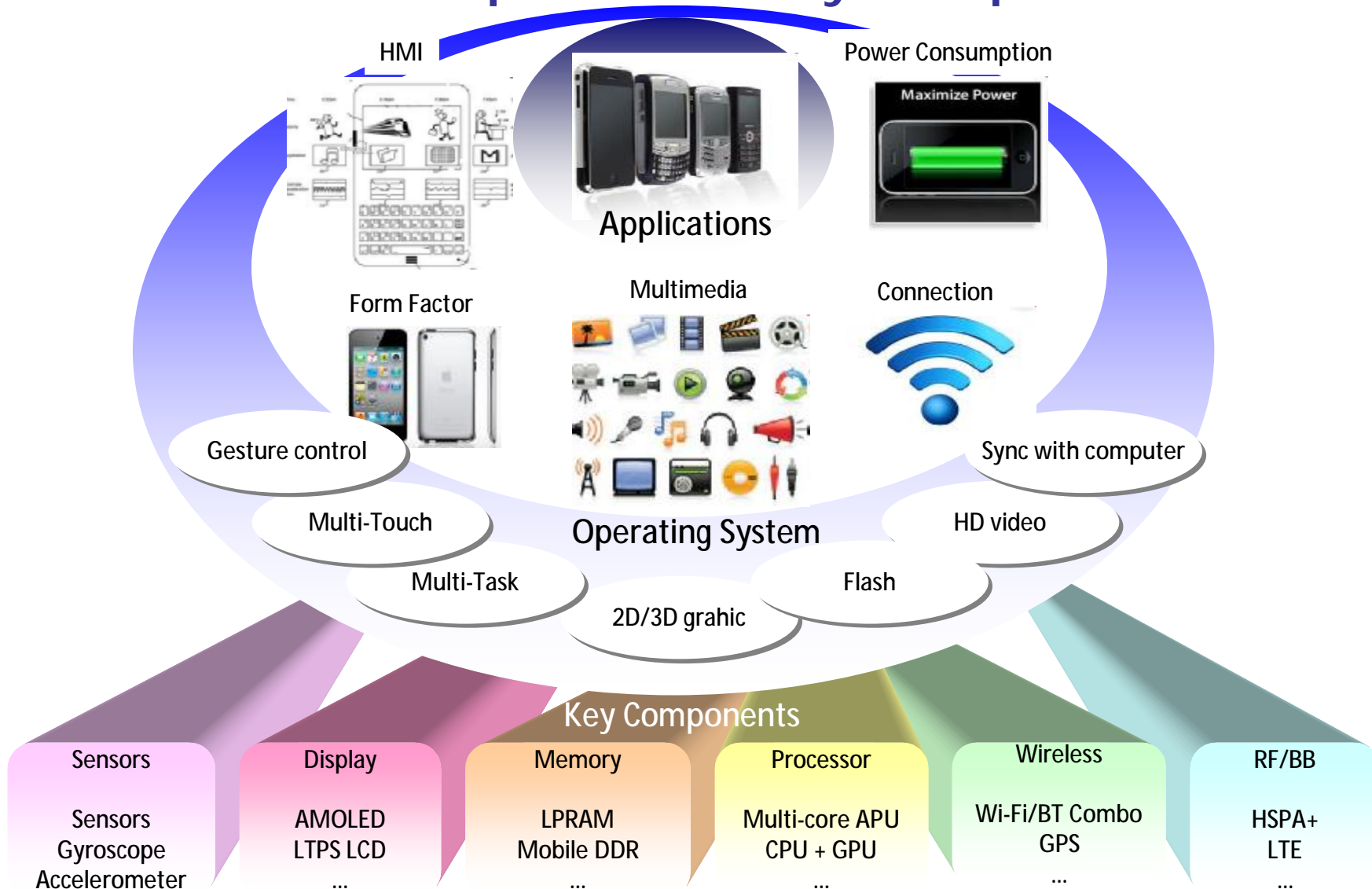


Worldwide Smartphone OS Market Share, Q410

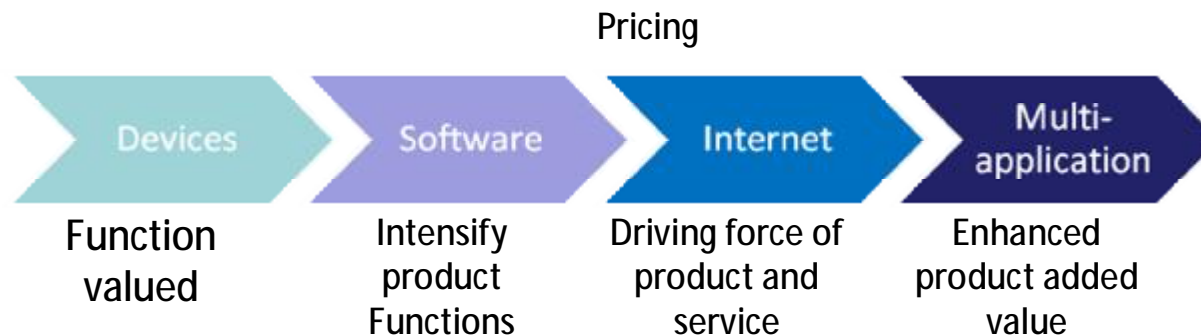
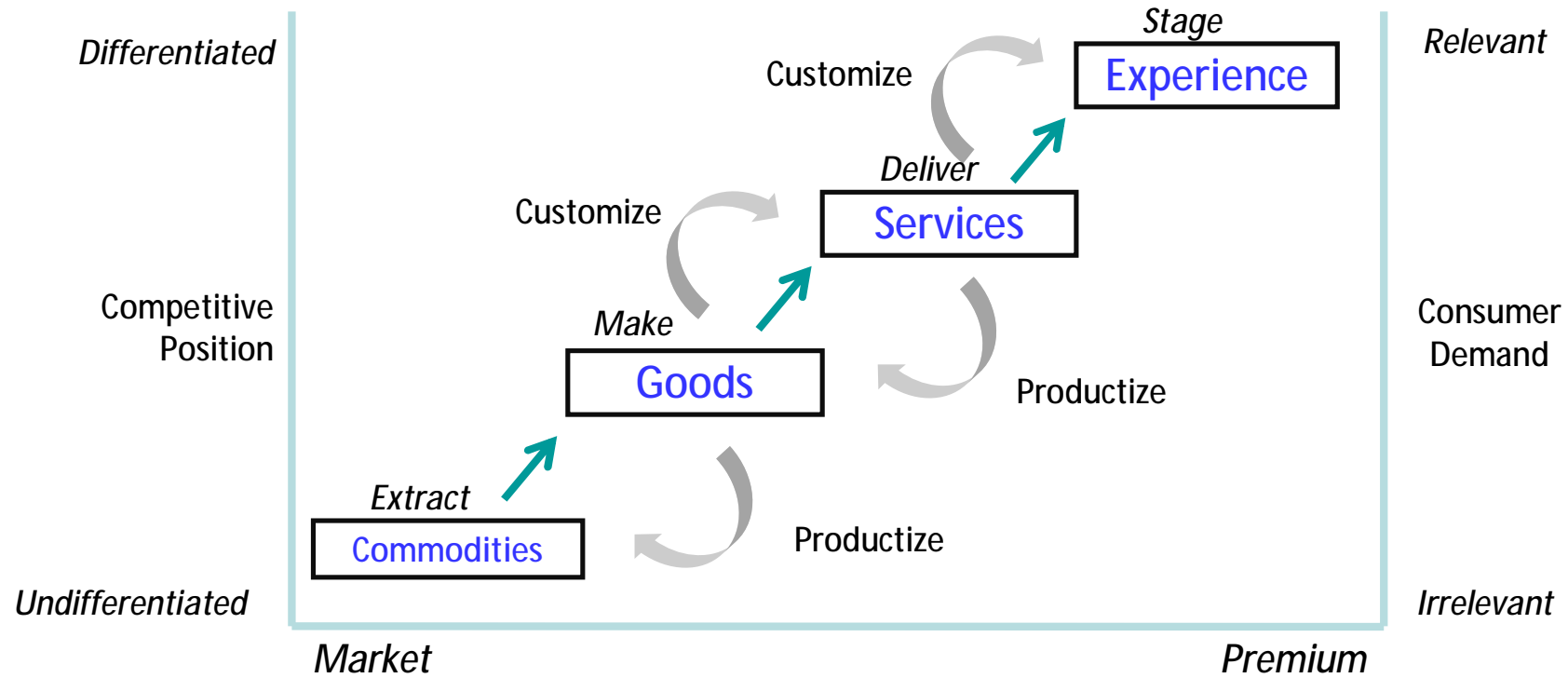


Note: Q410 market share vs. () = market share of Q409

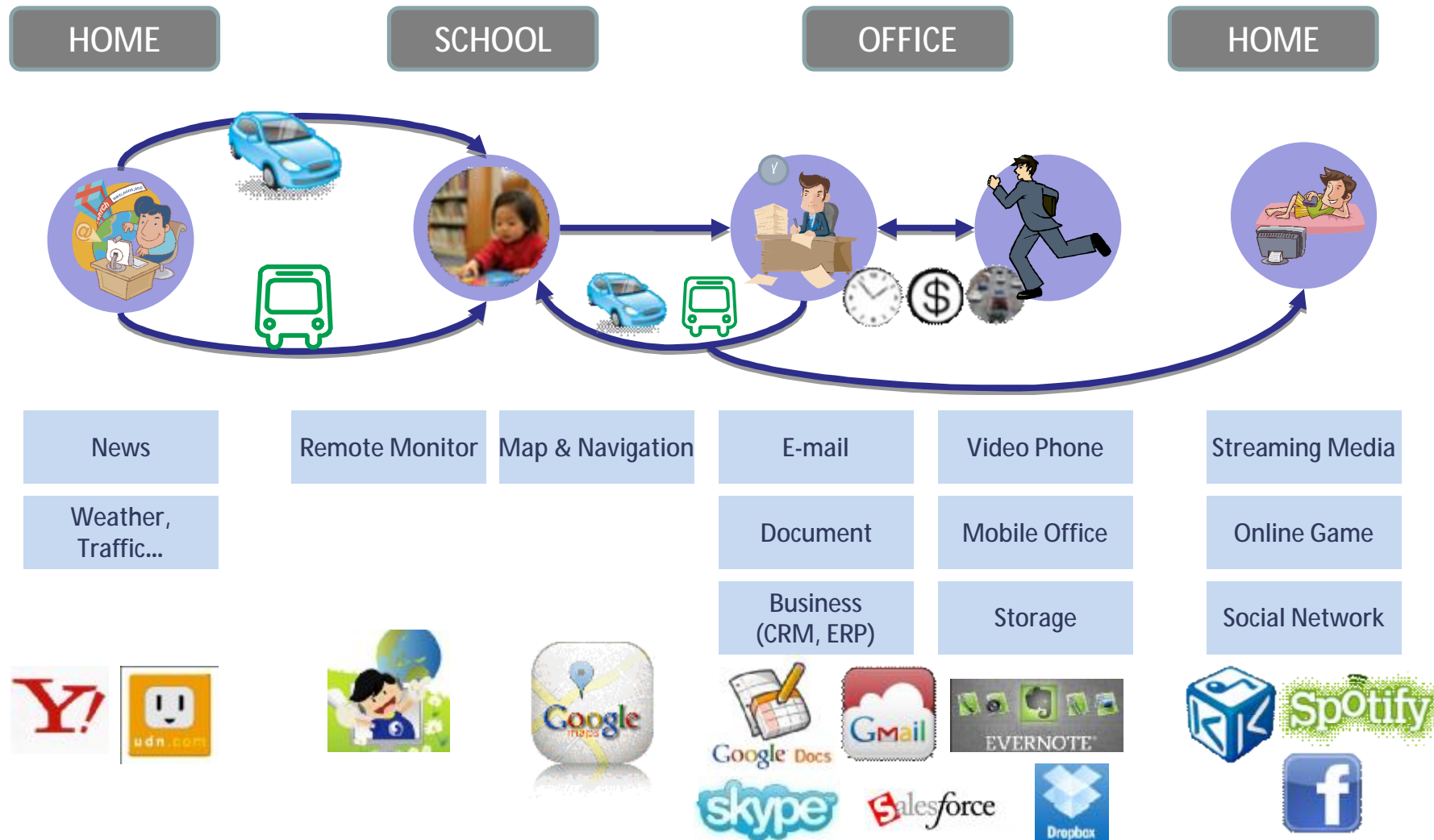
Innovative applications are leading the development of key components



Mobile devices to focus more on “Experience” than “Product”



“Cloud services around the clock” for experience offering



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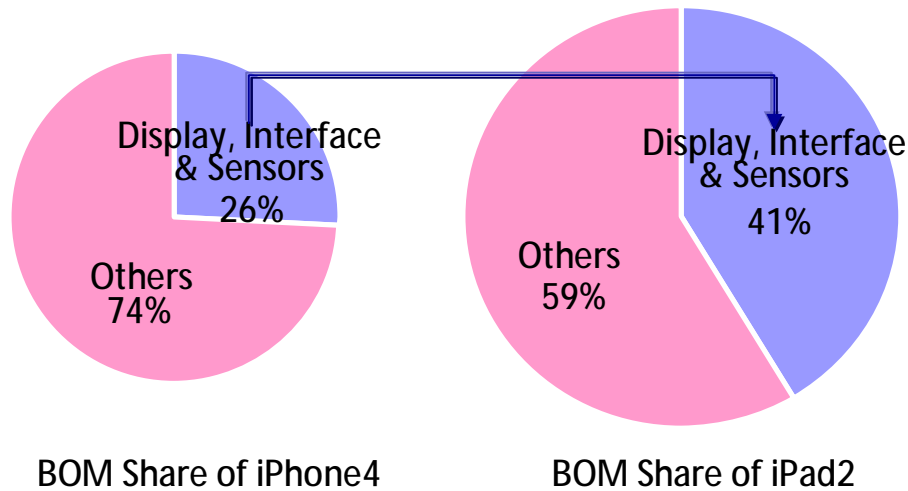
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Tablet: From “Experience” to “Industry”

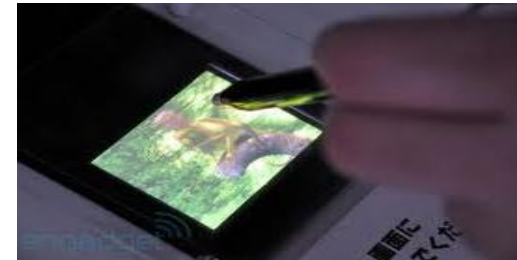


Tablet will provide more innovative user-interface experiences

Tablet will spend more cost on user interface



Touchable 3D display by NTT DoCoMo



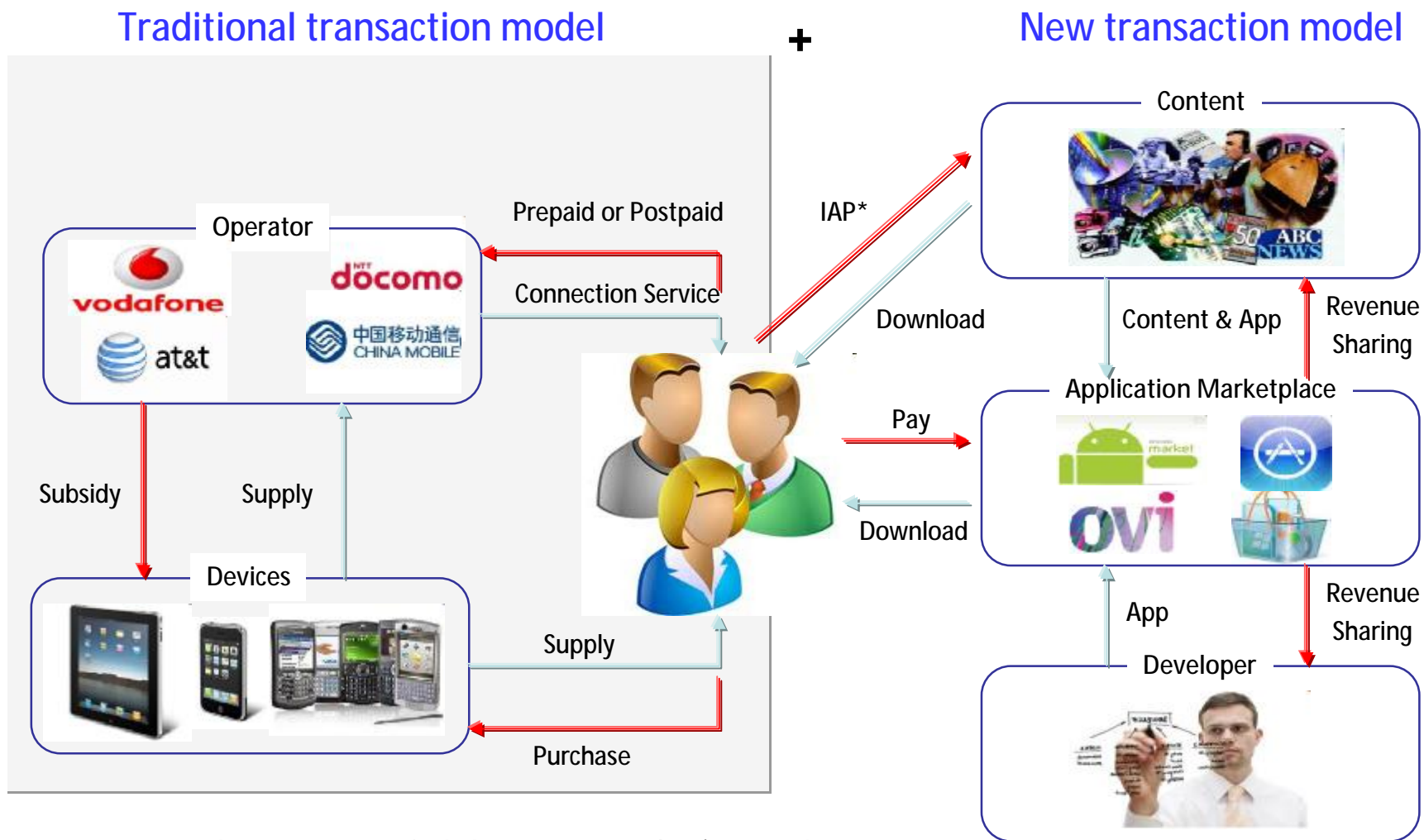
Hybrid Modes Flexible Display by DTC of ITRI



R2R Ch LCD by DTC of ITRI



Tablet will change the transaction model of ICT industry



Note: IAP=In App Purchase → Cash flow → Product/ Service flow

Tablet will be a new “Service Platform” for integration of ICT and other industry

Tablet for Car agent



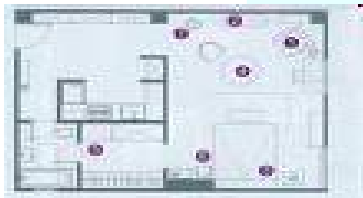
Tablet for Retail



Tablet for Medical



Tablet for Interior design



Apps

Tablets

System

Tablet for Business



Tablet for Insurance agent



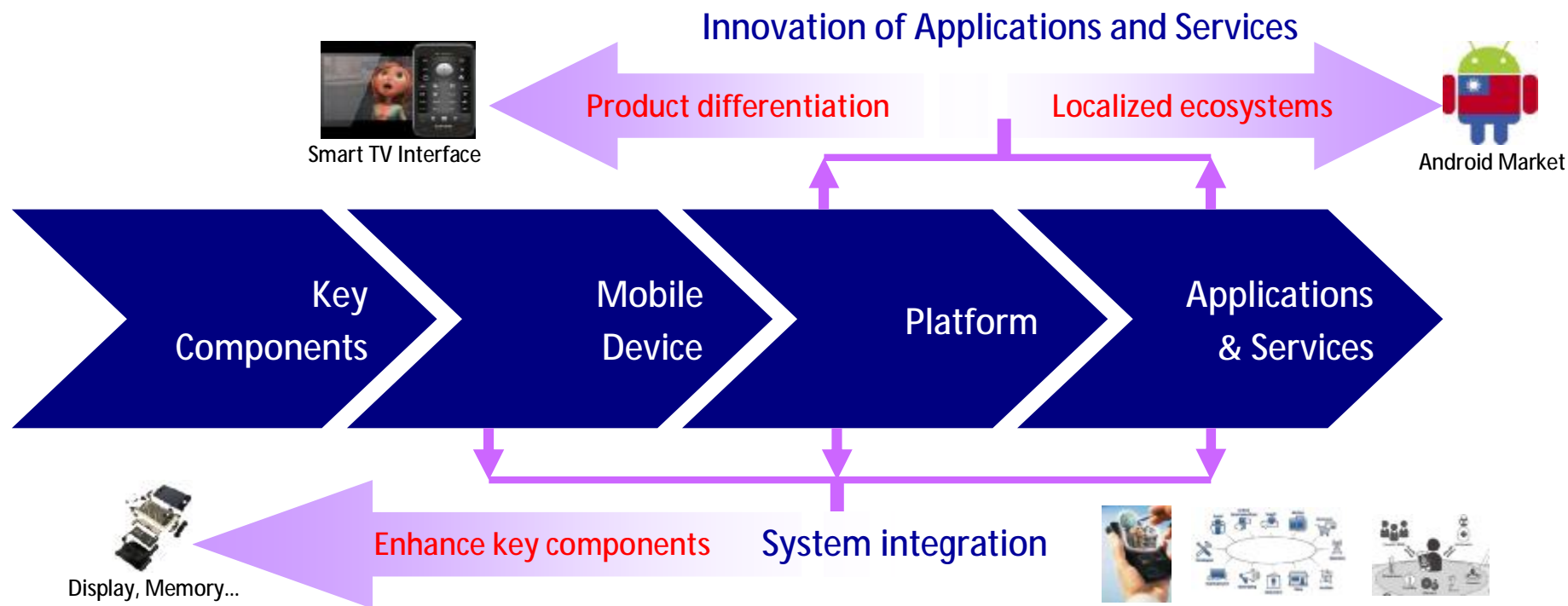
Tablet for Letting agent



Tablet for Education

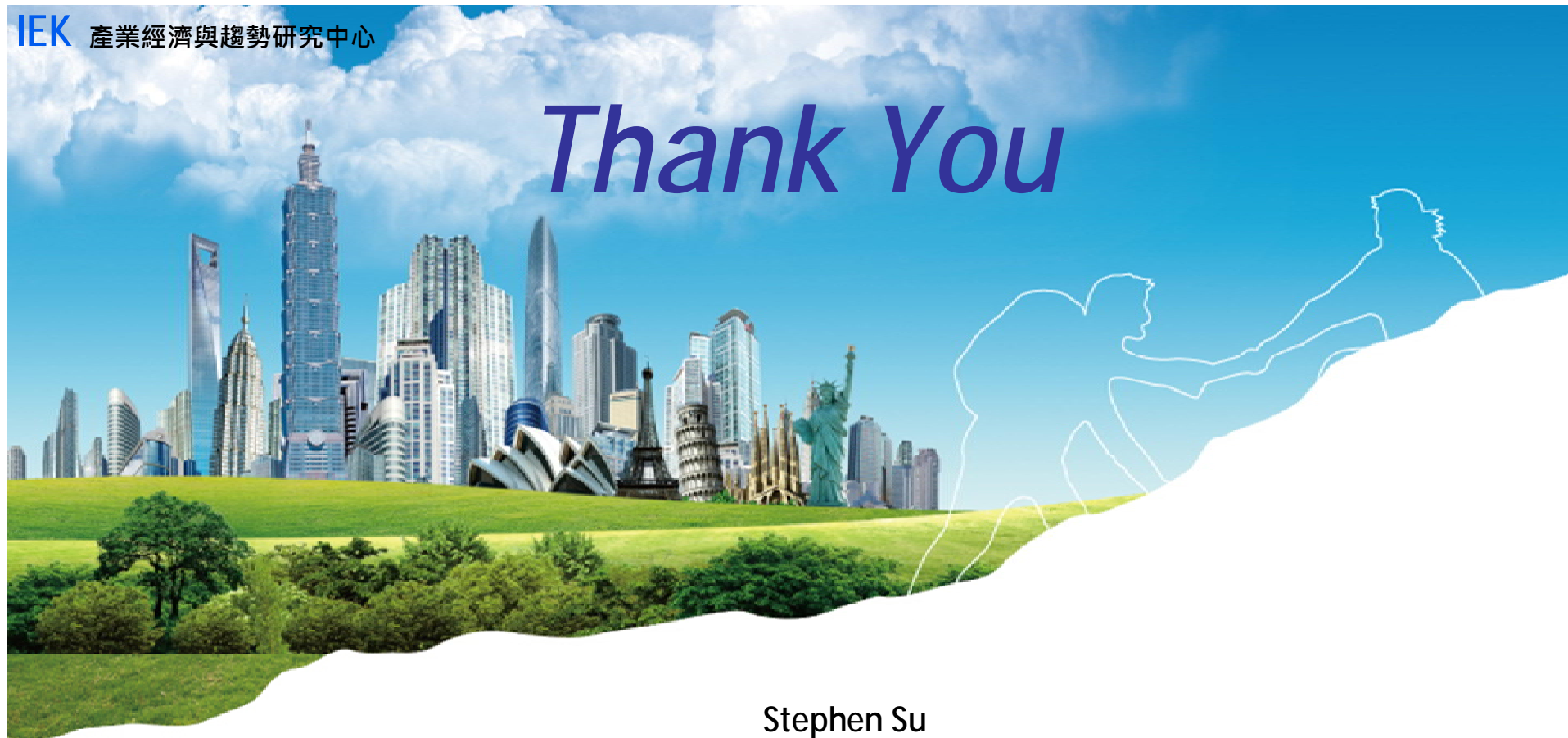


Taiwan to play a leading role in mobile devices



- Taiwan has a leading mobile devices manufacturing capabilities, and can supply most of the key components
- The next step will be to strengthen technology of key components, terminal design, application platform and service innovation
- In future, Taiwan could become the leading development and innovation centre in the world

Thank You



IEK View

<http://ieknet.iek.org.tw/>

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