



Mobile Applications Stores

Europe

Market Analysis and Business Assessment

Overview

All smart phones come loaded with standard applications defined by the manufacturer. However, the network operators, looking for revenue opportunities, have encouraged the development of other applications that can be used on the cell phones they support.

Using these applications will use the network services more and generate more revenue. The network operators established business relationships and development platforms to encourage the growth of these applications.

The release of smart phones like Apple's iPhone, with its 65,000 supported applications required the need for a single point of access to these via an "application store". Various network operators,

handset manufacturers and software developers are announcing plans for their "Mobile Application Store" ("MAS"). The MAS is a central location for purchasing supplemental mobile applications, possibly available for a fee.

This report evaluates the state of the mobile application stores and its expected evolution. For example, Sun Microsystems is analyzed as they also announced plans their own MAS. The report also evaluates MAS consortiums such as Symbian and Android.



Key Findings:

- The Mobile application market forecast is a \$9.0 billion revenue opportunity over the next few years.
- The handset vendors have taken the leadership role away from the network operators and are currently driving this market.
- Apple has defined and driven this market to its current state. All other players in this market are reacting to Apple and playing catch up.
- The market is young, confusing and unsettled. Besides the handset vendors, major players in this market are the network operators, software vendors, consortiums and retailers.
- Great opportunities for software developers. Despite support programs, they are left to figure it out themselves.
- Quote: "The closest thing I've seen to a 'business model' for marketing apps is to advertise like crazy until you get into the top 50 and once you're there, the top 50 list will start generating its own buzz ... But that's not a business model, that's like rolling the dice at a casino."

This report examines the MAS provided by the following handset manufacturers:

- Research in Motion ("RIM")
- Apple
- Nokia
- Palm
- Motorola
- LG
- Samsung
- Sony-Ericsson

This research also evaluates the following North American network operator's MAS plans:

- Vodafone
- Orange
- T Mobile
- Telefonica
- Movistar
- O2

Target Audience

- **Handset Manufacturers:** a comprehensive review of the Mobile Application Stores, development tools and support programs.
- **Carriers:** a comprehensive review of the Mobile Application Stores, development tools and support programs.
- **Mobile Software developers:** provide focus on what platforms offer growth and opportunity.
- **Potential Application Store providers:** a detailed technical comparison & review the market
- **Retail electronics distributors (business & retail):** a detailed technical comparison & review of the market.

Companies and platforms addressed in this report

- | | |
|----------------------------|-------------|
| • Apple | • Sun |
| • RIM | • Microsoft |
| • Nokia | • Android |
| • Samsung | • Symbian |
| • LG | • Handango |
| • Sony-Ericsson | • AppCubby |
| • Motorola | • AppBoy |
| • HTC | |
| • Vodafone | |
| • Orange | |
| • T Mobile | |
| • Telefonica Movistar & O2 | |

Table of Contents

Overview
 Technical Overview
 Mobile Application Development Toolkits
 Mobile Application Stores
 Comparative Analysis
 Application Store Analysis
 Analysis of Developer Support Programs
 Overall Analysis
 SWOT Analysis
 Market Overview
 Market Forecast
 Market Analysis
 Market Predictions
 Business Opportunities
 Where are the business opportunities?

Questions Answered

- Who are the key market players and how are they positioned?
- Where is the growth potential in this market and what are the issues?
- Where will this market go, how will it develop, and evolve?
- What are the revenue opportunities for the mobile application stores market?





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