

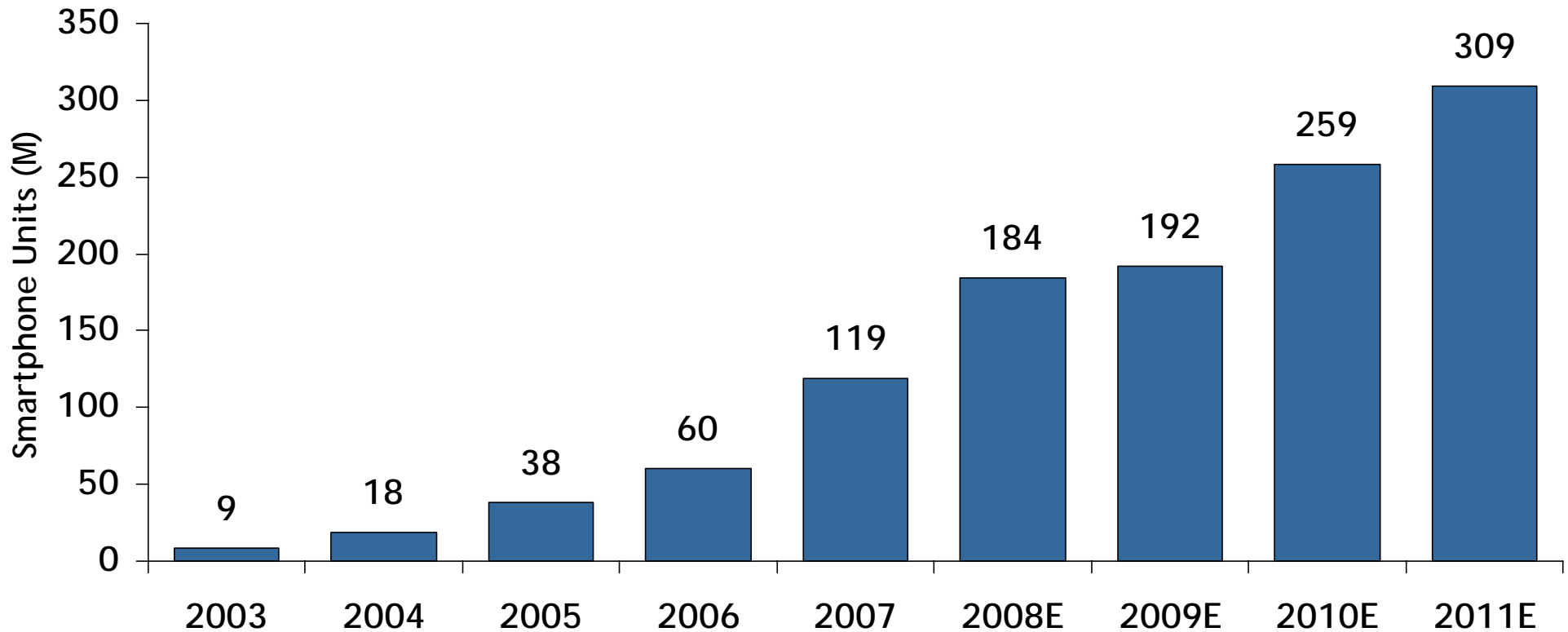


The New Mobile Landscape Stanford POMI 2009

The Rise of the Smartphone

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Phone to become most ubiquitous connected computer



2009: Smartphones 2.0

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Pervasive Wireless Networks Driving New Device Innovation



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GPS Navigation System



3.5G Data Card



Mobile Internet Device



Netbook



E-book Reader

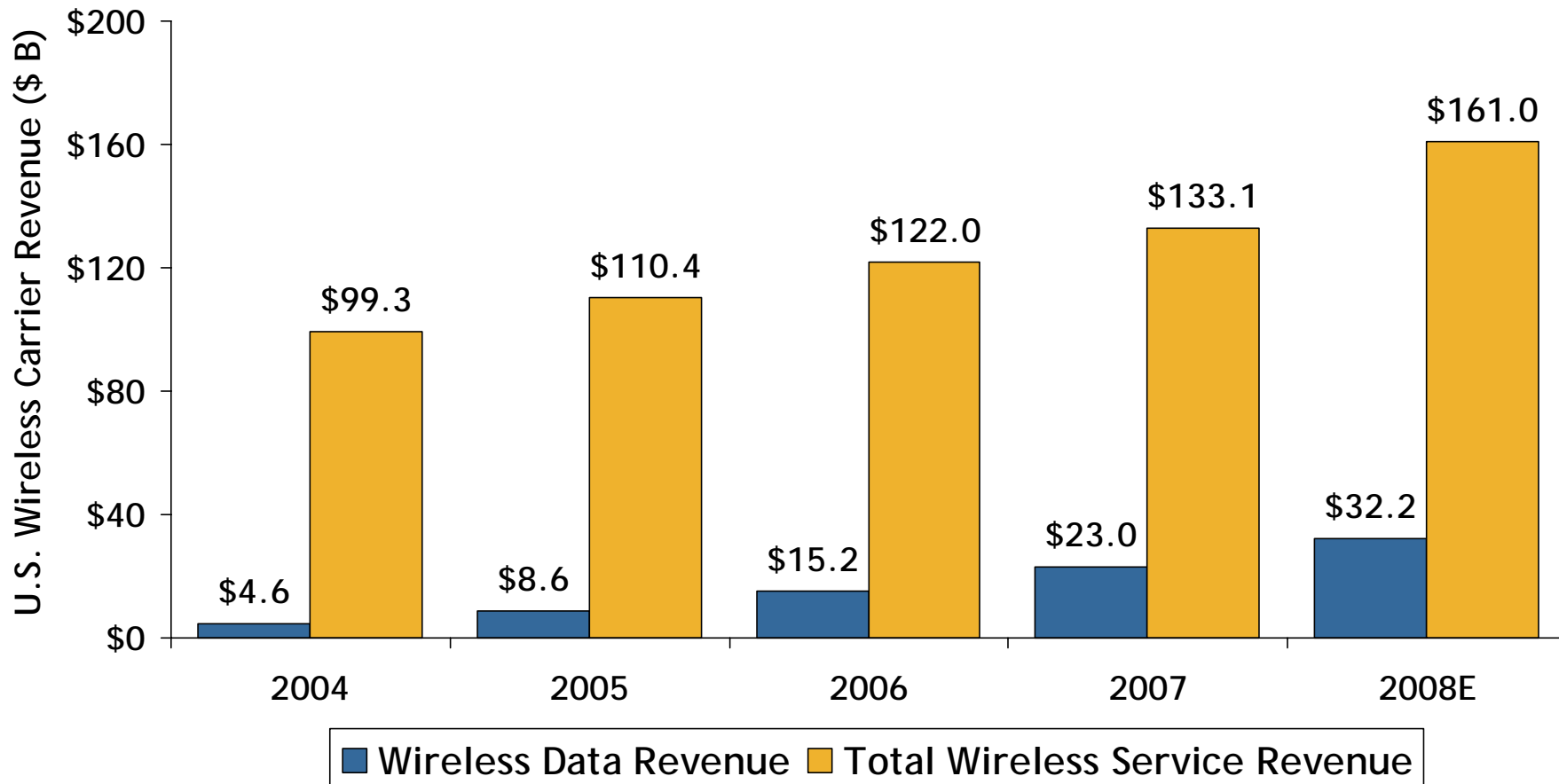


Web Tablet

Wireless Data Revenue Becoming Significant ...



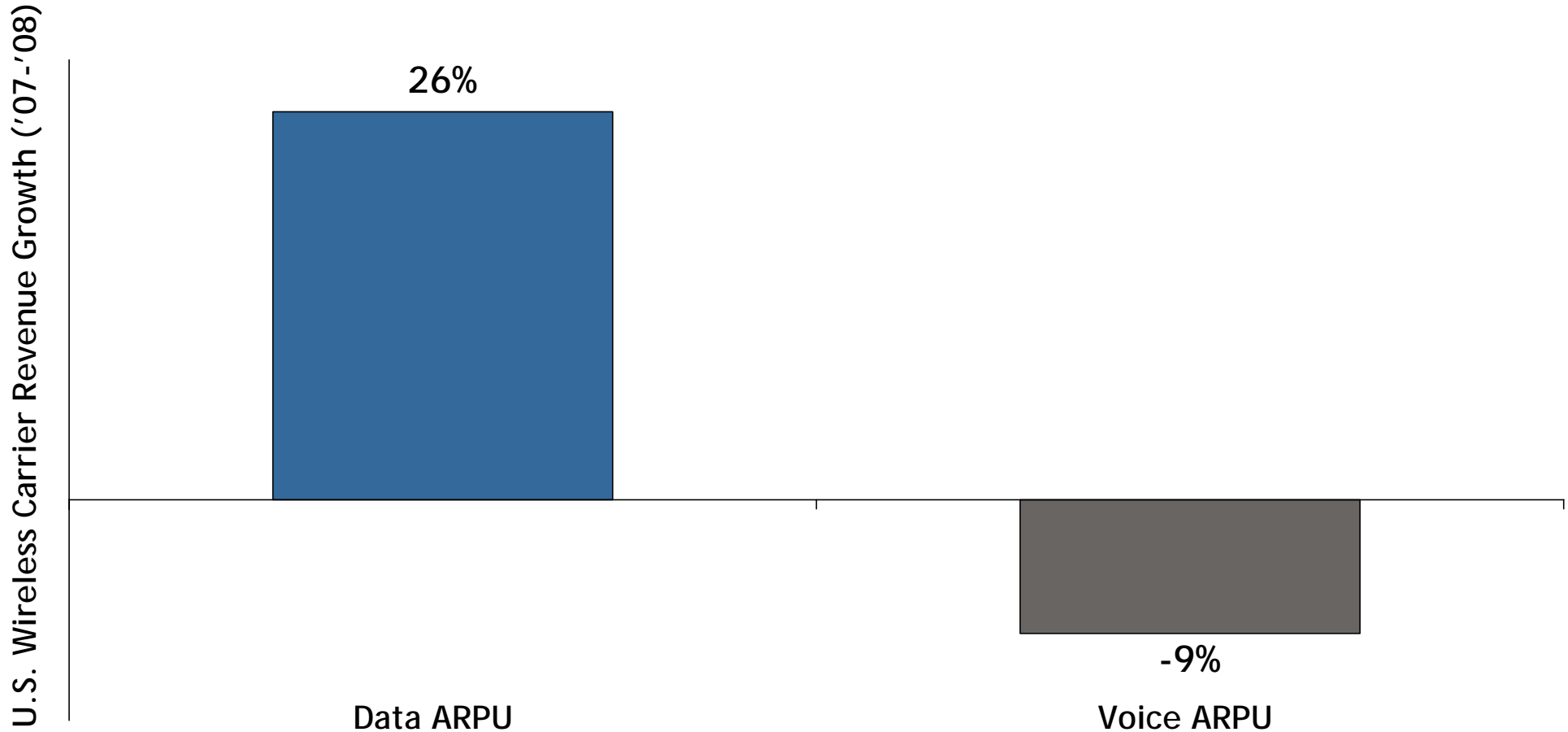
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... While Still Growing Faster Than Any Other Service



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Source: Multimedia Intelligence, Nielsen, analyst estimates

Open Platforms = Open Innovation



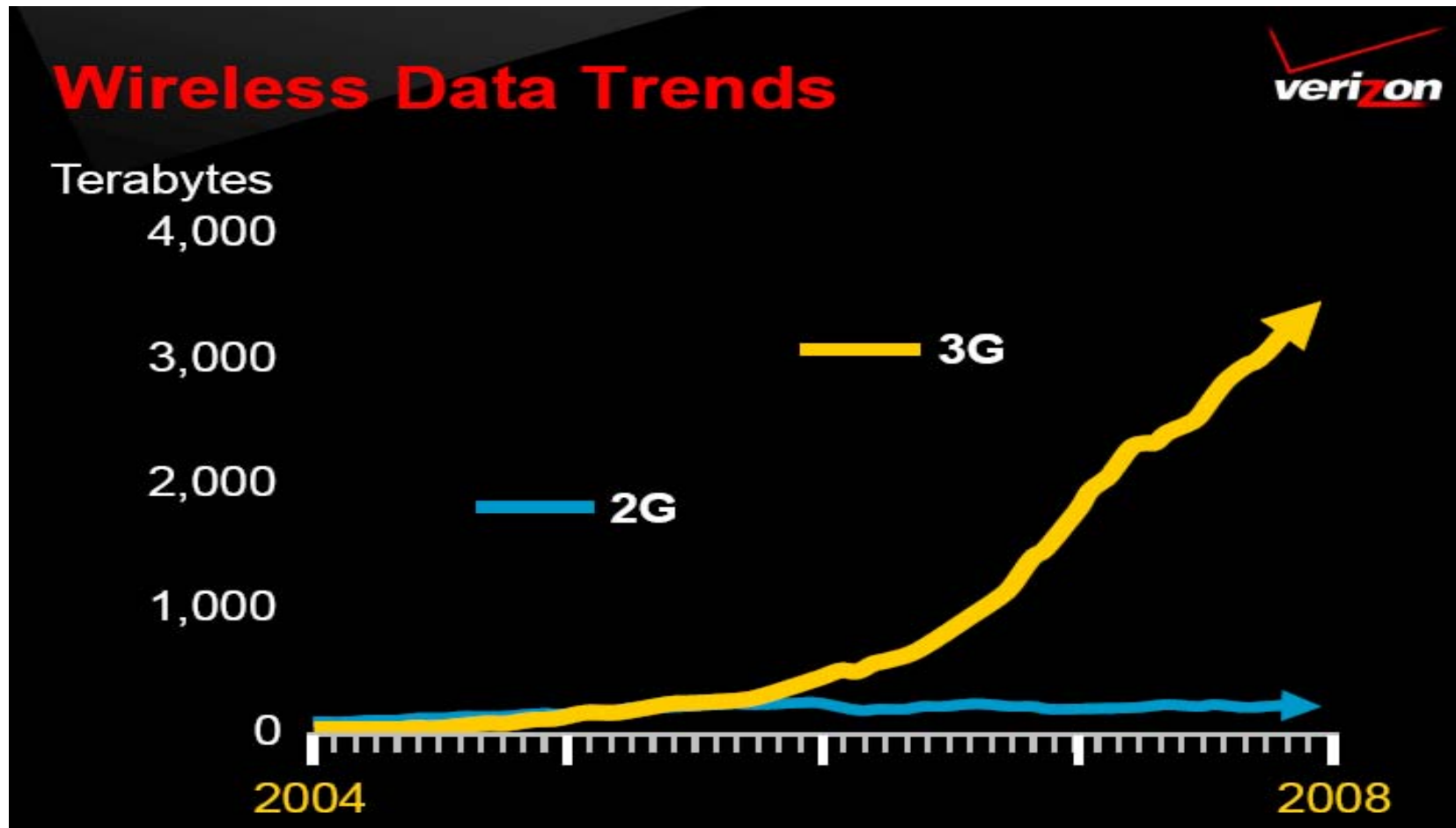
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- VoIP moves to mobile
- Picoprojectors & desktop UIs
- Speech recognition 2.0
- Digital virtual goods

3G Growth vs. 2G

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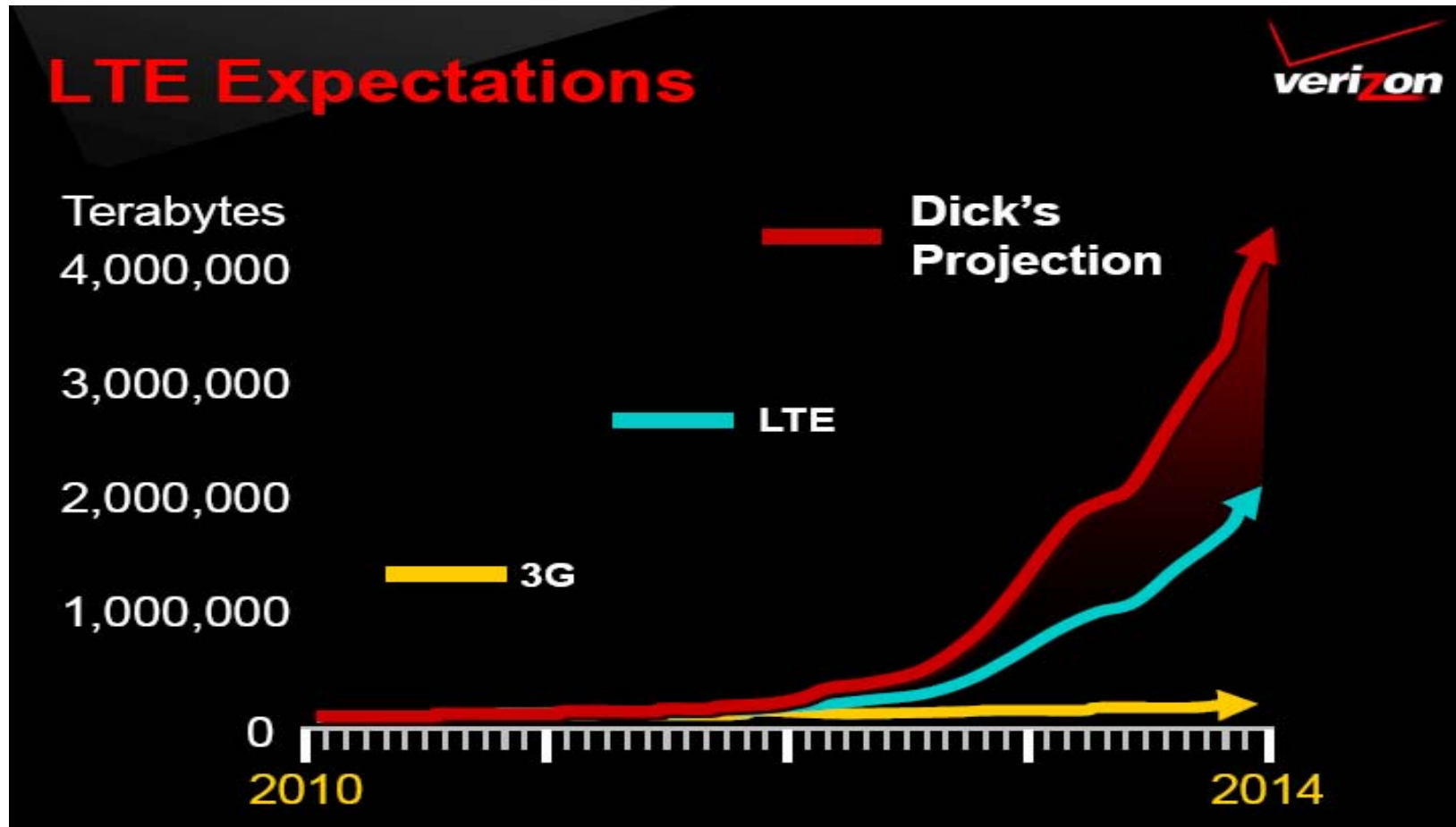
SOURCE: VERIZON PRESENTATION BY CTO DICK LYNCH



LTE Expected to be Even More Dramatic

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Industry Challenges Persist ...



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- Device fragmentation
- Complex ecosystem
- Application discovery and payments
- Overloading of 3/3.5G networks and backhaul

... but also create opportunities

Opportunities in Mobile

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