

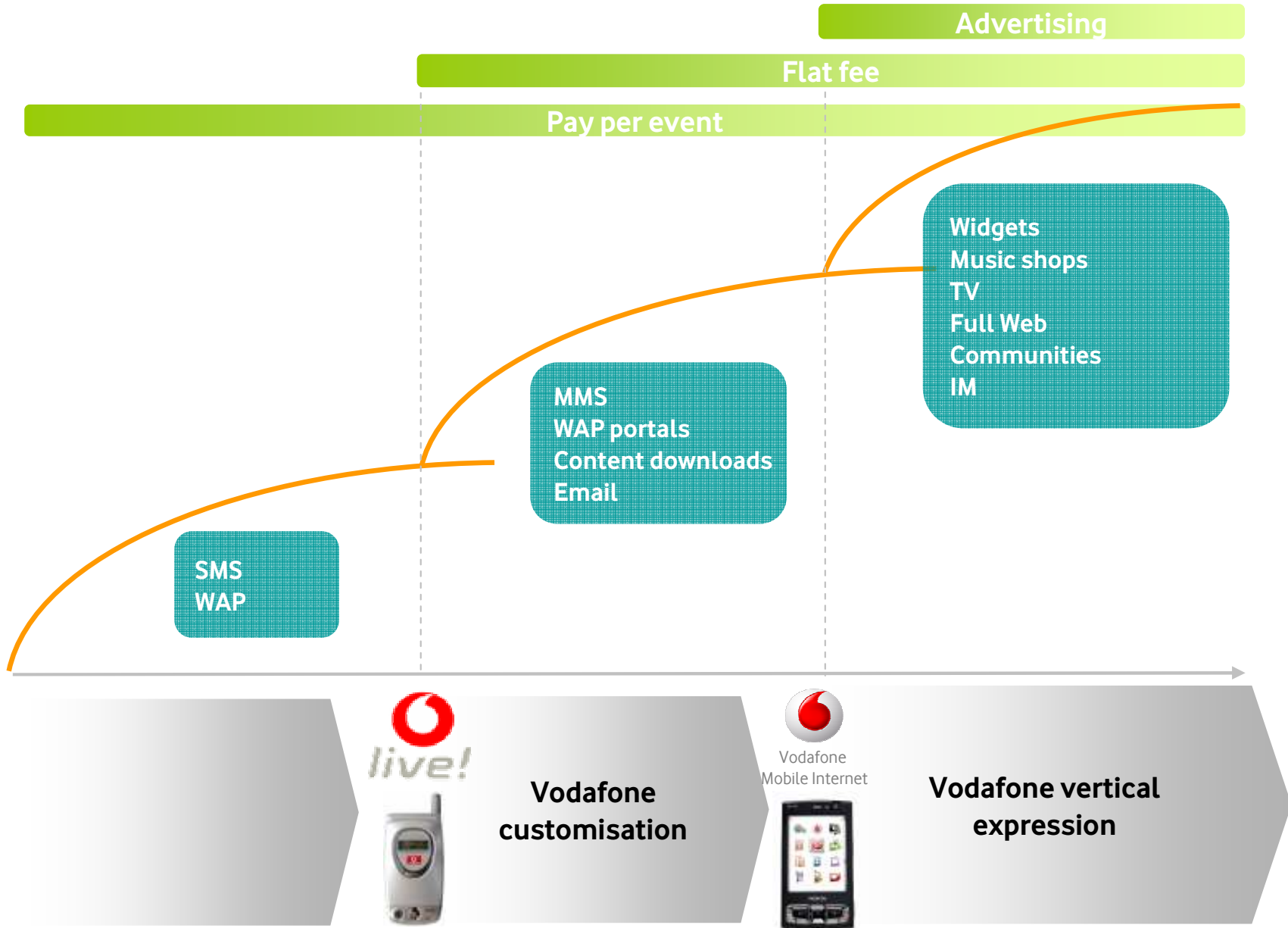


Internet Services in the mobile space

Jens Schulte-Bockum



Mobile service evolution



Major players have entered the mobile service space this year



Emerging branded service platforms are changing the way to deliver services to the market

- End to end services
- Fully integrated User Experience
- Dedicated hardware

Nokia Ovi



- Meaning "Door" in Suomi
- Launch announcement in fall 2007 around Music, Games & Maps at first with other services to follow

Apple iPhone



- Launched in the US in June 2007
- Launched in Europe in November 2007
- Tight integration with iTunes music shop

Google/Open Handset Alliance / Android



- Open-source mobile platform developed by the Open Handset Alliance

Evolution through acquisition



This evolution is backed by market acquisitions in the region of €15Bn over the last 12 months

2006

2007

Nokia

gate Mobile navigation systems

loudeye Digital music

twango Social networking community

enpocket Mobile advertising

NAVTEQ Digital mapping

Microsoft

Mobile search

massive Video game advertising

Tellme Voice activated search

ADECN Digital music

aQuantive Online advertising

Musiwave

ScreenTonic Mobile advertising

Google

Marc from Google Radio advertising software

measure map Orion Blog analysis

Advanced search algorithm

Website applications

Jotapop

nevenvision Face recognition

YouTube Video sharing

endoxon Mapping solutions

adcopter media Video game advertising

double click Online advertising exchange

FeedBurner RSS feeds

postini Online security

GrandCentral VOIP, identity management

Zingku Mobile social network

jai ku Micro-blogging service

Yahoo

jumpcut Online video editing and sharing

bix User generated content

rm rightmedia Online advertising exchange

actionality Mobile advertising

Zimbra Web based mail

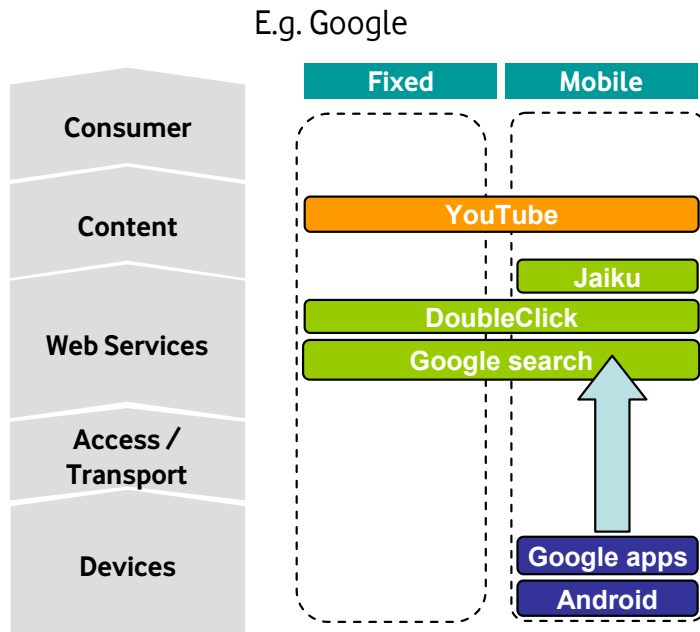
blueithium Internet advertising

Increasingly, new players are entering with a vertical integration of services

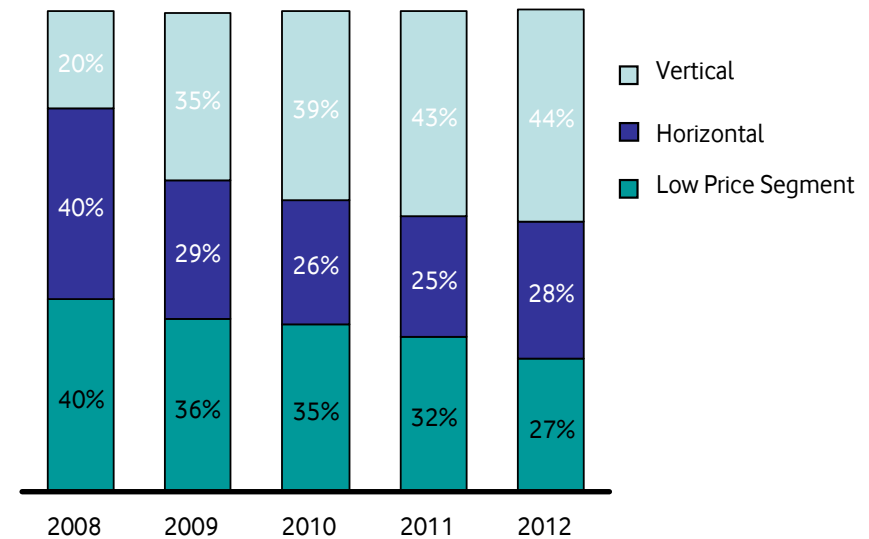


Vertical integration between services and devices is happening ...

... and will become a major part of the total Western European devices market

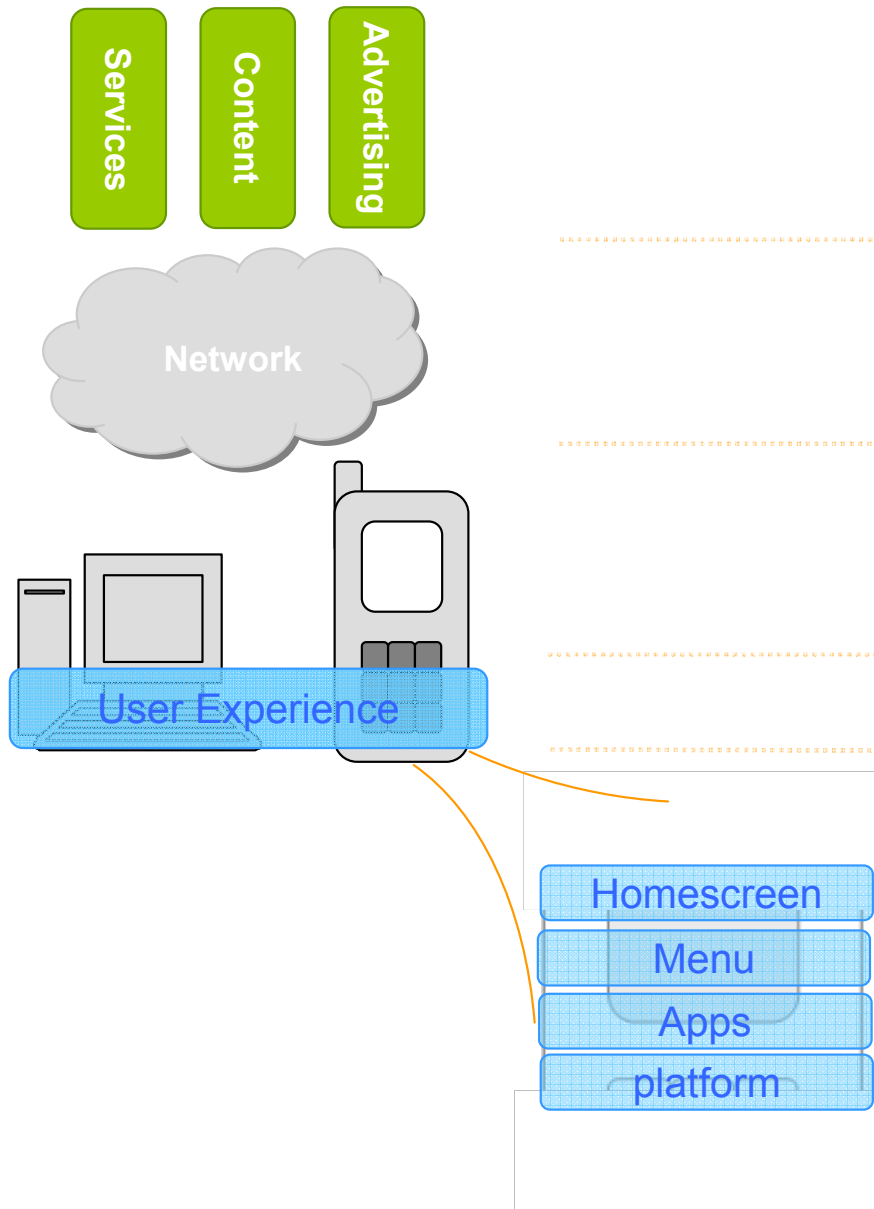


Share of vertical experience in %



- **Vertical integration** : a combination of brand, tariff, services, terminals and backend solutions into a unique customer experience and proposition on a limited number of device
- **Horizontal integration** : a light subset of the vertical experience distributed across a large base of many devices

Vodafone – Service delivery models are both vertical and horizontal

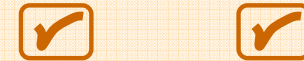


Vodafone
Pure play
Vodafone



Partnership
model

Areas of collaboration
with 3rd party &
handset vendor



Mobile Internet – Vodafone intent



Vodafone is developing new services and software to ease the customer journey



- ▶ **optimised browsing** (mobile-rendered web sites, dot-mobi, bookmarks, search and directories)
- ▶ **personalisation options** (personalised portal, content and application catalogues)
- ▶ **out-of-the-box services** (1-click access to pre-installed services, on-device portal)
- ▶ **internet-devices for all** (legacy and new, great browsers, large screens, high speed. simple UE)

Way forward in Vodafone's customer experience



vodafone

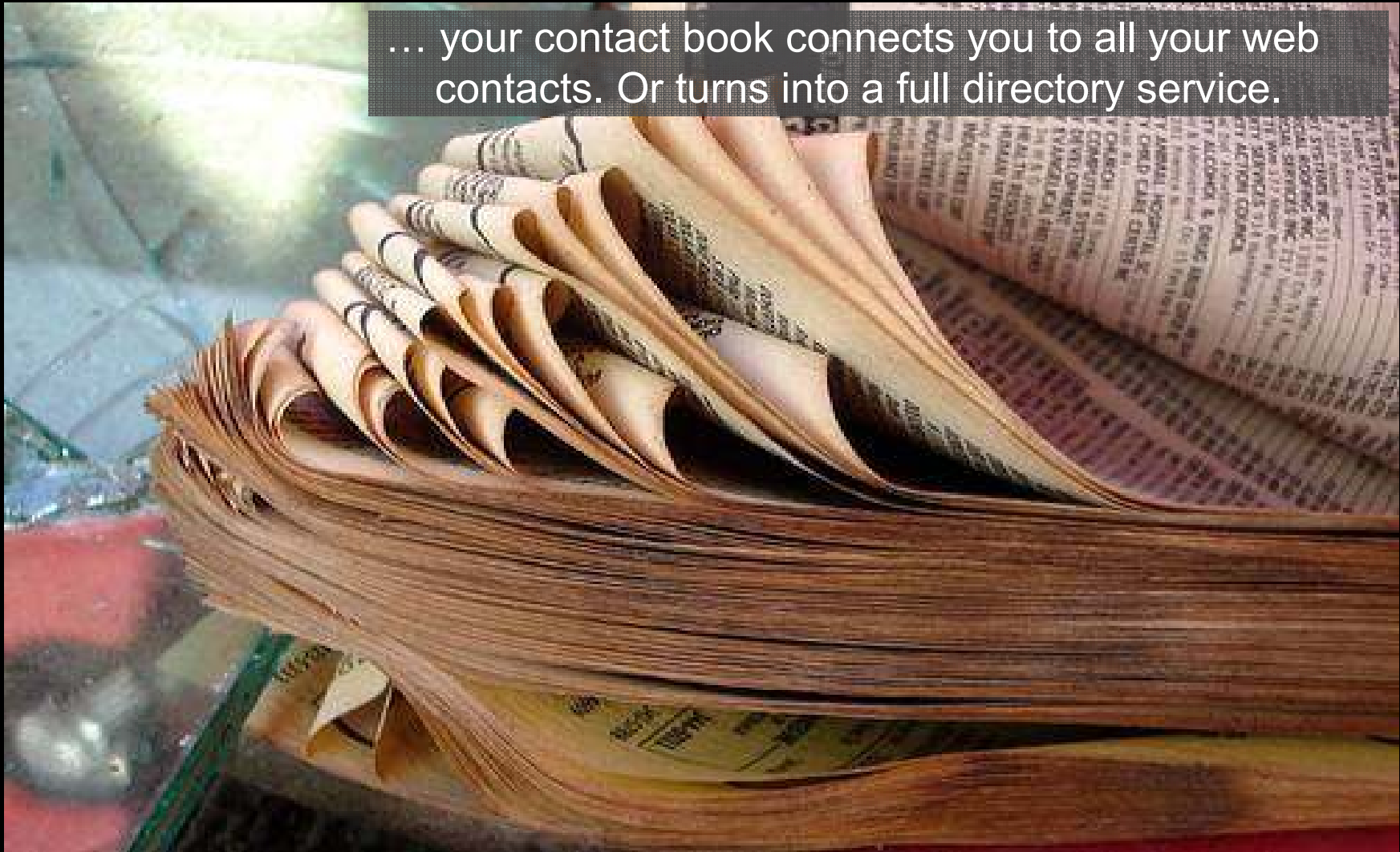
Unique experience around people

- integrate identities and social networks
- store everything in network not device
- evolve new communication abilities



...one connect book...

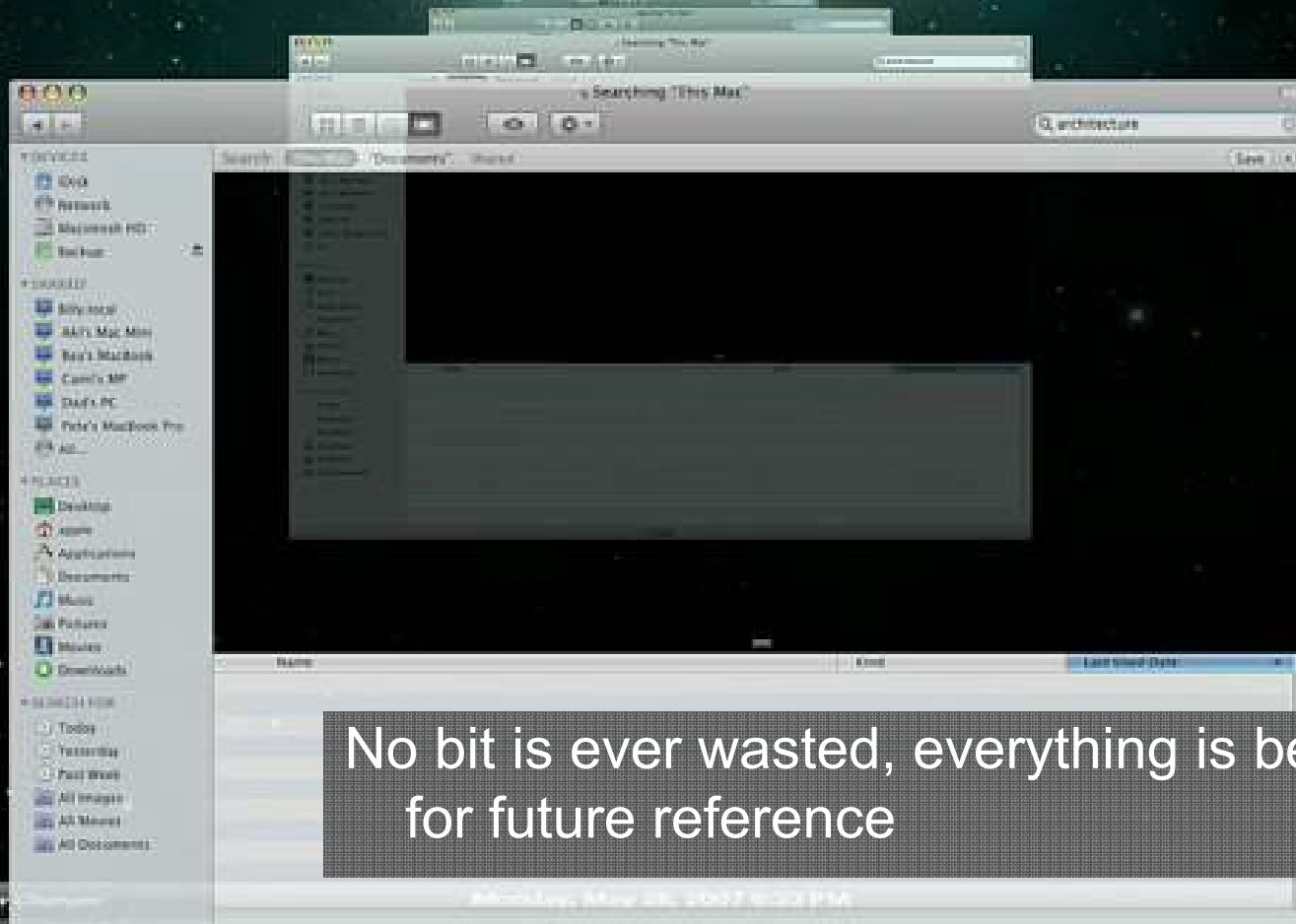
... your contact book connects you to all your web contacts. Or turns into a full directory service.



... no bit is ever wasted...

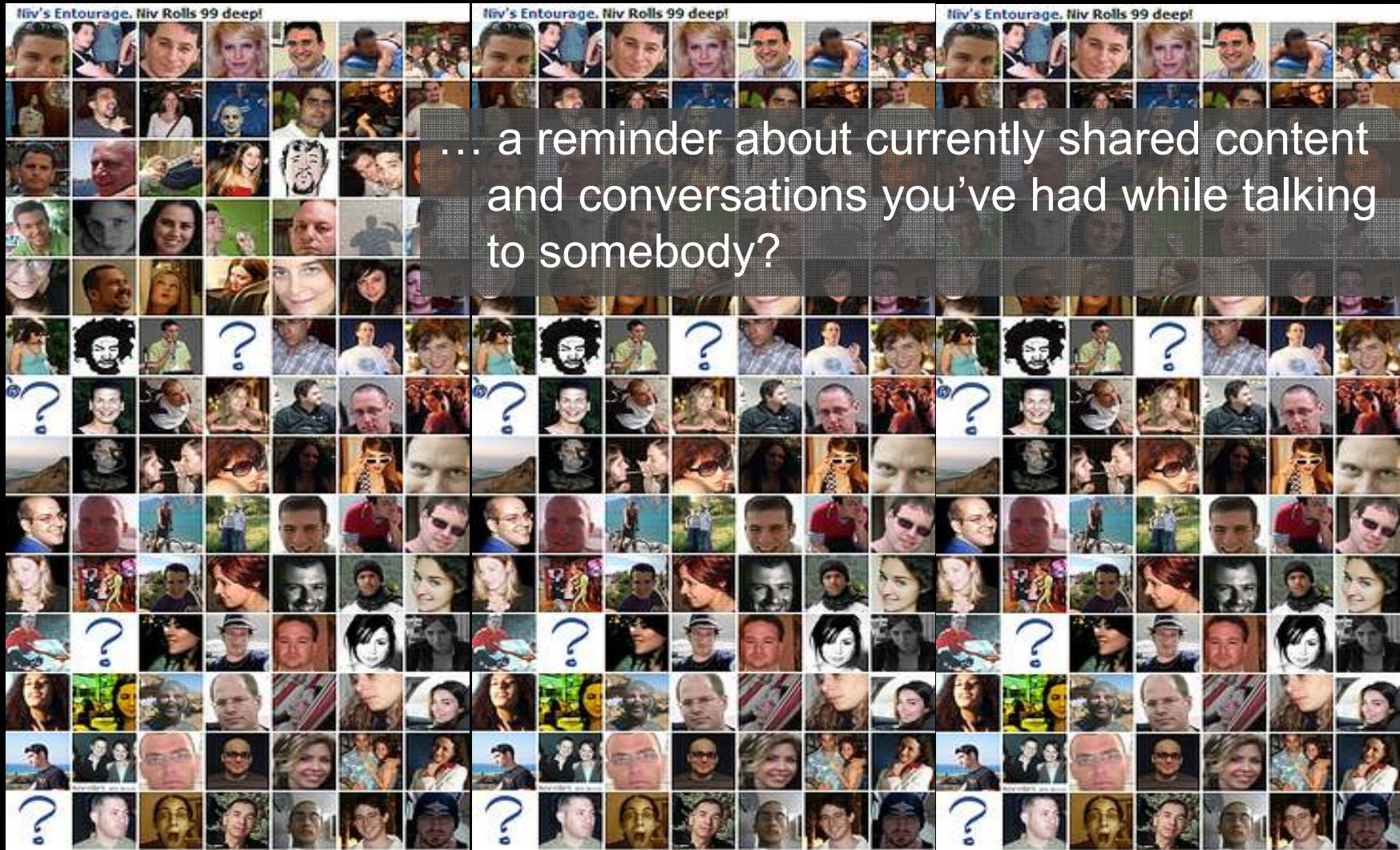


vodafone



No bit is ever wasted, everything is being stored for future reference

...remind you where or when we last talked...



...indicate availability with minimal effort...



Vodafone's services collaboration with Nokia



vodafone



S60 platform collaboration

- accelerate the deployment of Vodafone services on Nokia handsets
- better integrate Vodafone services on Nokia handsets



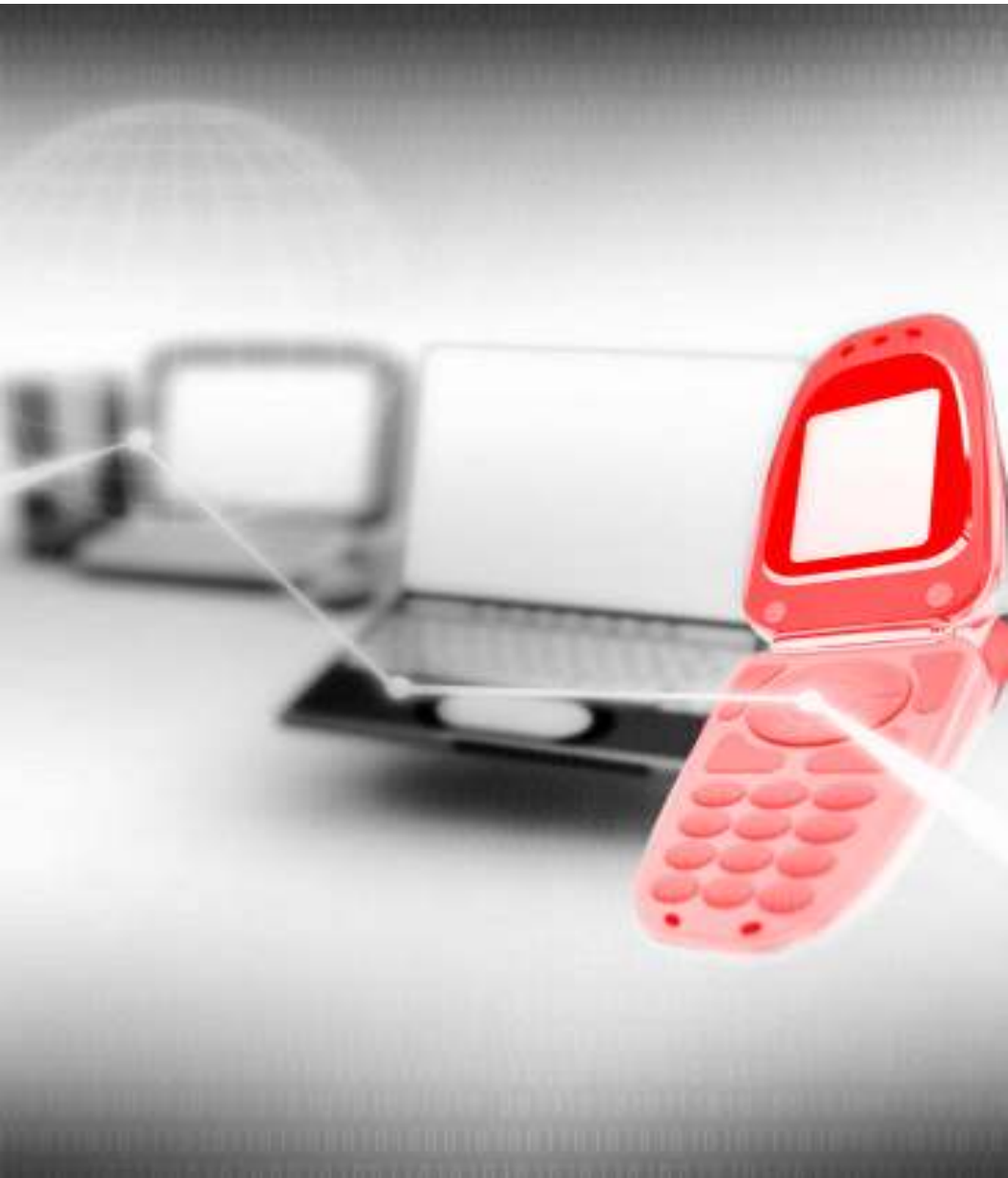
S60 is a major partner to bring the best Horizontal experience for Vodafone services

Ovi collaboration

- provide the best experience to the customer around Ovi and Vodafone services



Factors for continued success



- ▶ Services must be **relevant** and the benefit clear, maximising customer choice
- ▶ Service discovery and user experience should **not confuse**
- ▶ **Be disruptive**, S60 licensing needs to respond to the market changes and business models of others
- ▶ **Accelerate** publication of platform APIs to encourage deeper integration of applications and services

Thank you.

