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Mobile Solution 2008

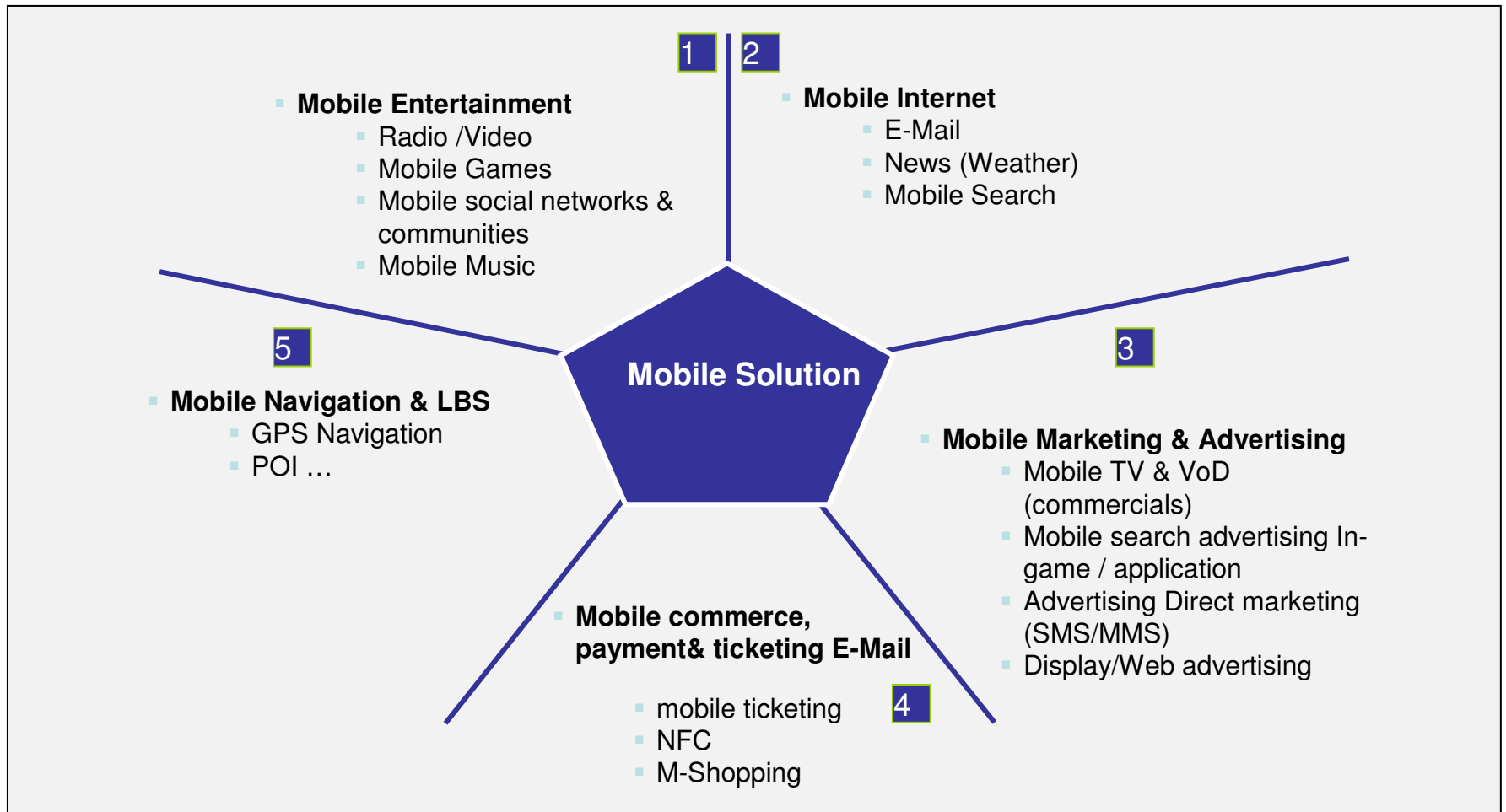
The World of Mobile Applications

von der neyen &
partner

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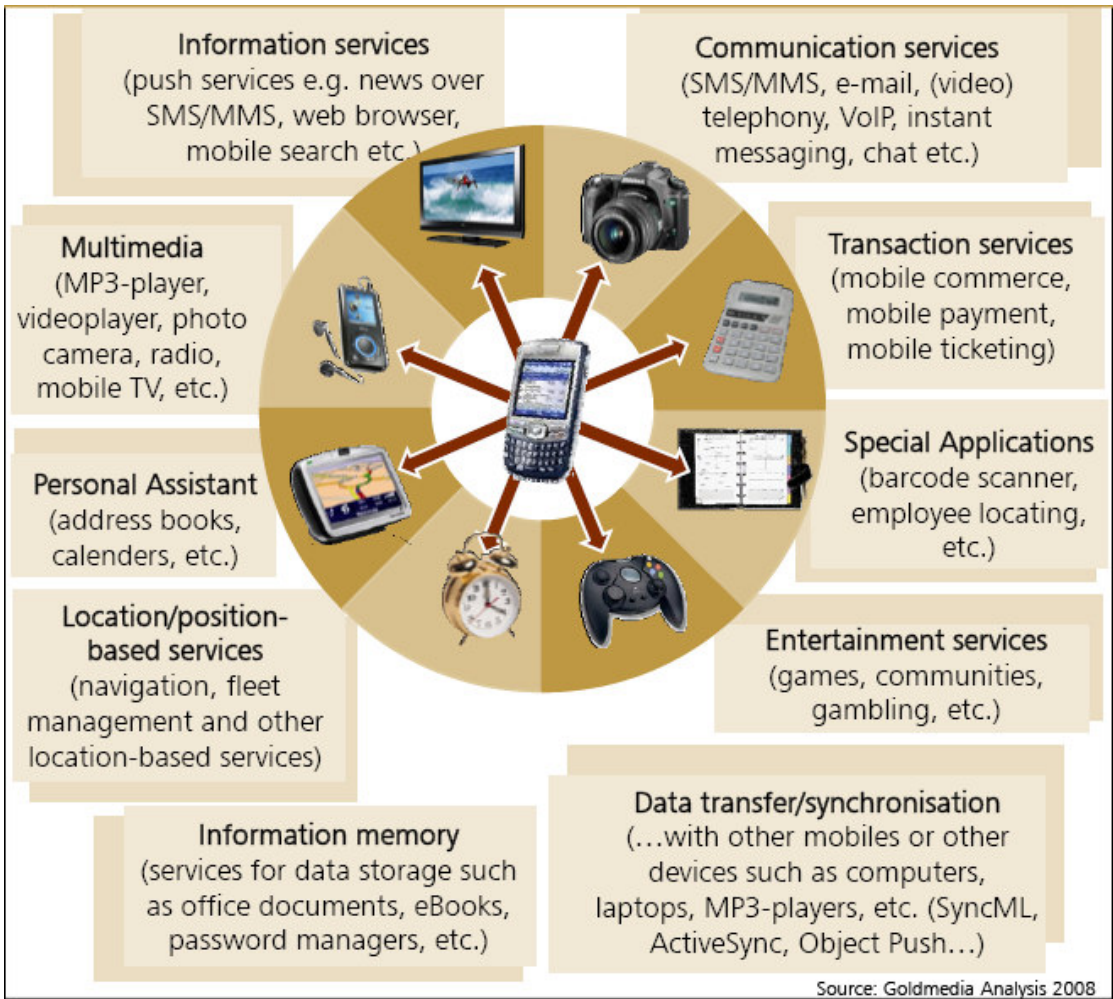
Services and Markets for “Mobile Solution“

2/3 of 15-27 year olds can not live without their mobile!



Overview: “Mobile Life“

Mobile Life encompasses all mobile B2C services & applications!

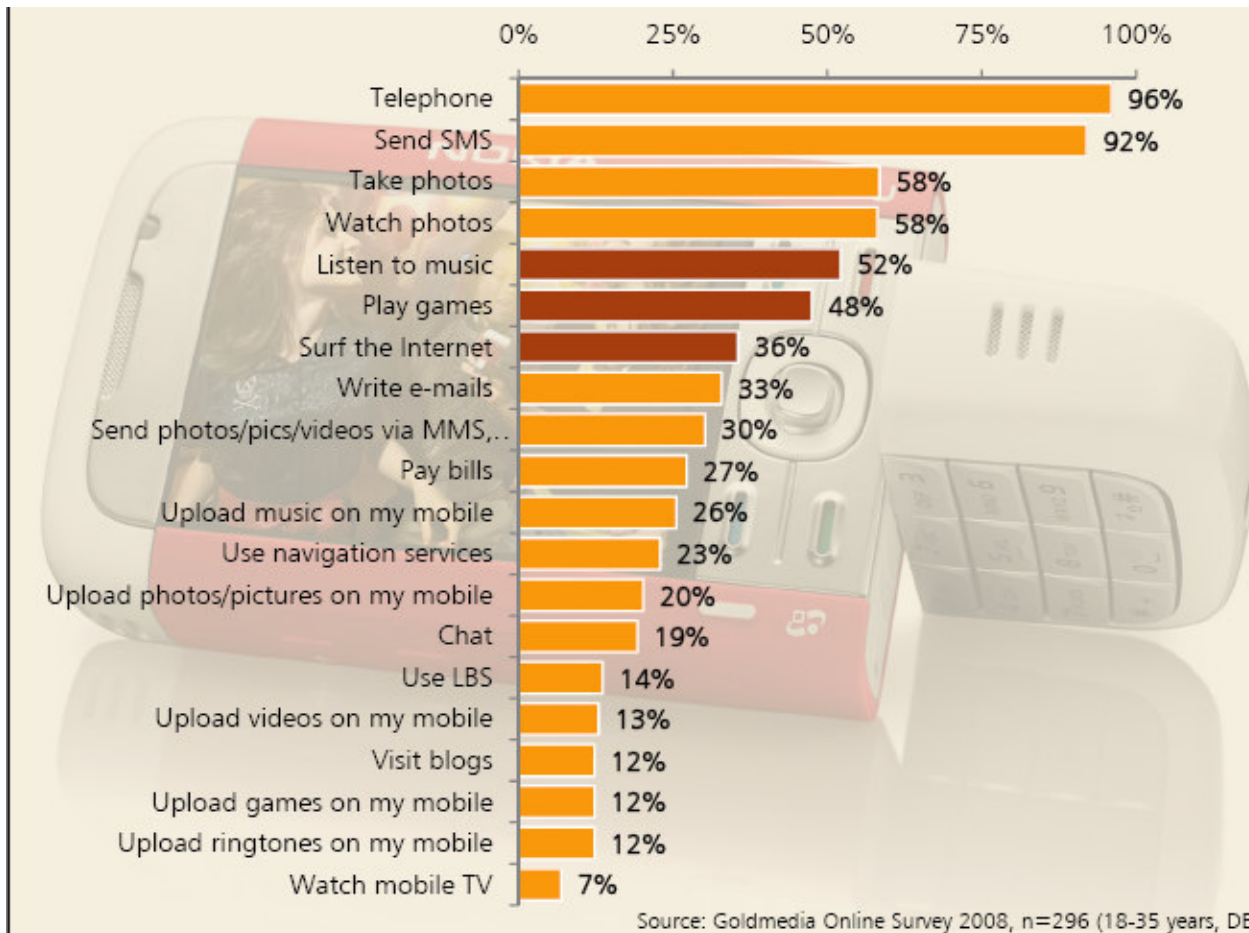


Status quo & outlook

- Constant development and convergence of mobile features and services
- Traditional services (such as SMS and voice telephony) could be cannibalized by new features and applications (such as mobile instant messaging or Voice2Text)
- Voice telephony still important, but data services will catch up:

Usage of m-entertainment services in DE 2008

Mobile phones are part of the every day life!

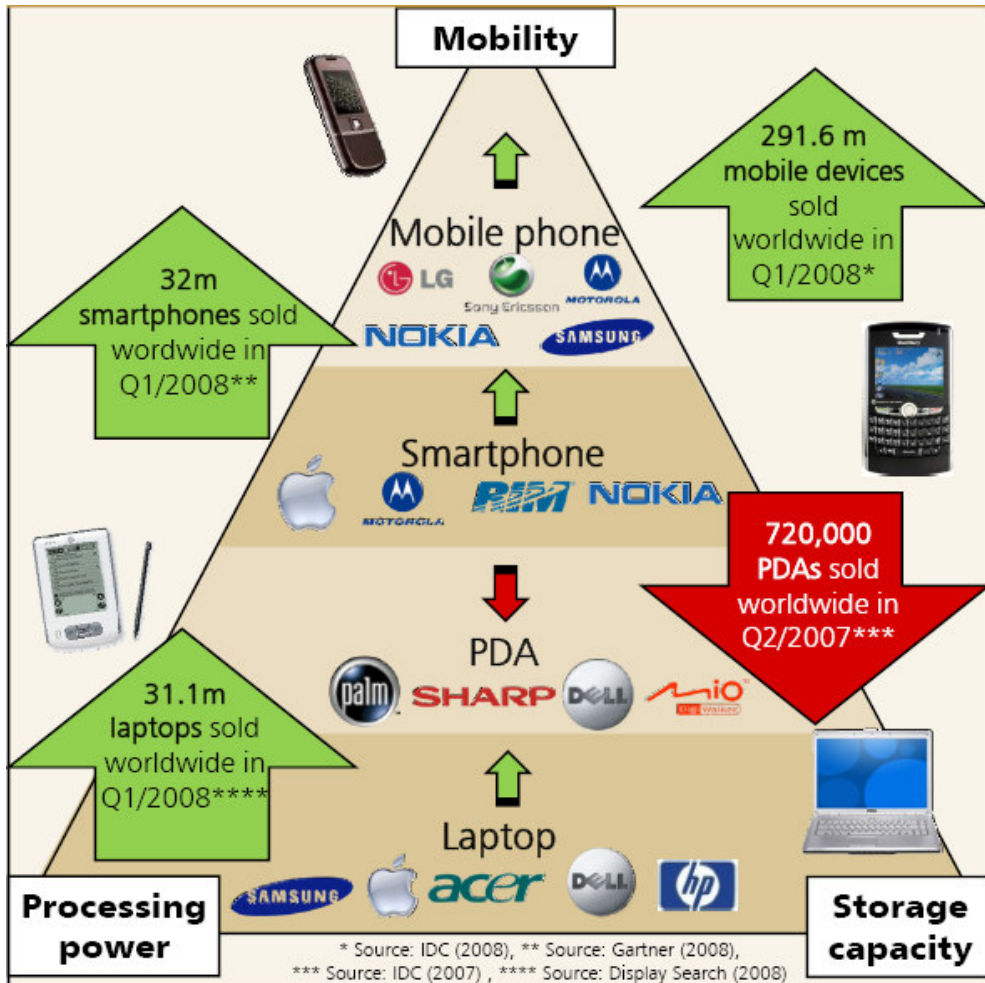


Conclusions

- SMS is the No1 non-voice-application (92%).
- More than half of all respondents take and view photos or listen to music at least once a month.
- Less than 50% play mobile games regularly, about 1/3 uses internet & write e-mails at least once a month.
- Navigation services and LBS are not very popular yet.
- Mobile TV brings up the rear of all mobile entertainment services investigated (7%).

Market development end user devices

Mobile and smartphones are more popular than PDAs!

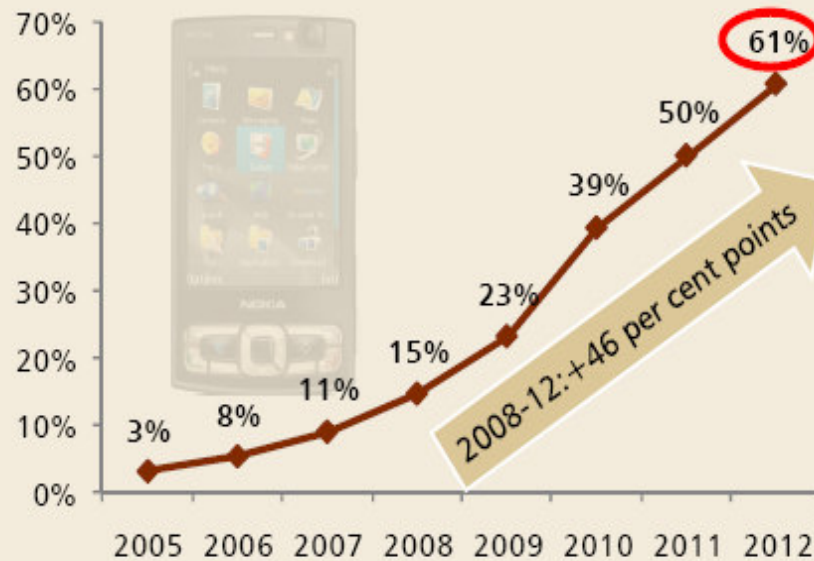


- ### Results
- Mobile phones, smartphones and laptop sales increasing, PDA losing more and more market share.
 - Worldwide, 11% of mobile handsets sold in 2007 were smartphones.
 - Diversification of functions and forms has blurred the boundaries between mobile devices.
 - Trends: multimedia mobile phones with focus on mobile TV, radio, music, gaming, etc. (e.g. iPhone), organizers with web browser and office applications (e.g. BlackBerry), mobile navigation devices (e.g. Nüvifone)

Forecasts

Technology and Application

3 G Penetration in % of all mobile subscribers



Source: Goldmedia 2008

Forecast Goldmedia

Outlook 2012

- 3G penetration will reach more than 60% of the German subscribers by 2012!
- New 3G technology enables delivery of richer contents such as mobile TV, video and games.
- Challenges: business models and revenue share, type, length and frequency of ads, consumer attitudes
- Mobile advertising still in its infancy in Germany!
- German mobile entertainment market will grow by ~500m Euros by 2012.
- Stronger Market for Mobile Enterprise Solution (Vertical and Horizontal)