

Hits and Misses of Mobile World Congress 2012



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Developments, Strategies, Stakeholder Messages

- **Viability for universal mobile broadband including network, spectrum and device costs**
- **Network technologies, equipment developments and carrier deployments**
- **OTT and operator-provided services, and mobile ads**

And

- **Crowd control!**
Analysts suffered baton charges, long taxi queues and countless seething cocktail receptions to bring you this insight from the show



Viability for universal mobile broadband including network, spectrum and device costs

- **Pleas to stop governments soaking MNOs with exorbitant spectrum fees and special taxes while also crimping profits with caps on call termination and international roaming rates**
- **Spectrum shortages will cause capacity crunch and unrealized data growth expectations**
- **Operators need profits and cash flows to roll-out mobile broadband beyond demand hot spots**
- **Smartphones for \$100; then \$50 or \$20?**



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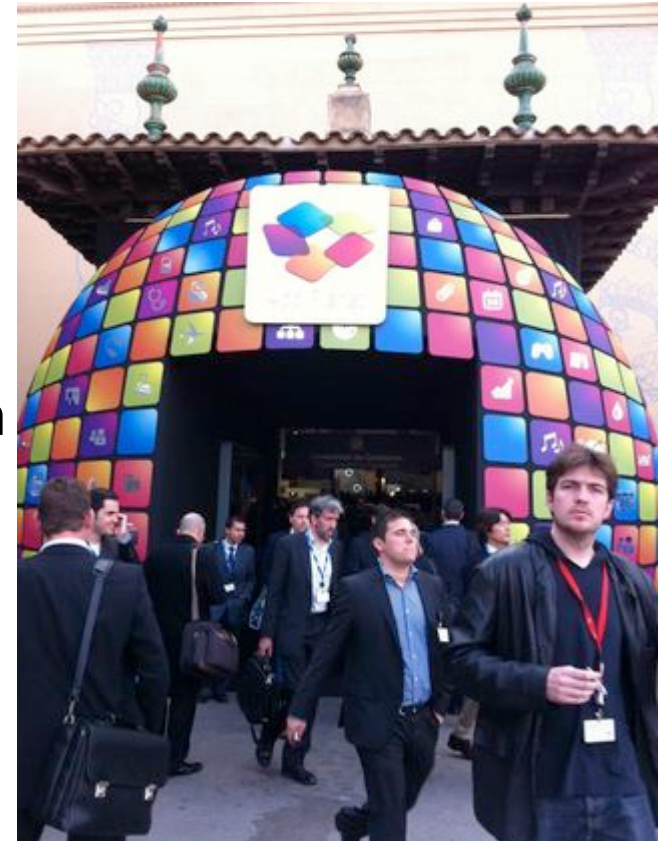
Network technologies, equipment developments and carrier deployments

- **3GPP standards advances prompt conformity and consolidation in NEPs' drive to stay on the pace**
- **NEP differentiation is difficult to achieve or sustain**
- **NEP strengths and weaknesses are reflected in the operator network strategies they promote**
- **Femtos must compete with other small cells in hetnets**
- **WiFi's role expands with "onload" as well as "offload"**
- **VoLTE is coming, but this is a trickier proposition than VoIP on fixed networks with DSL, cable nets, Skype etc**
- **WiMAX technology "second owners" might do okay**



OTT and operator-provided services, mobile ads

- **Are OTT players freeloaders or are their services the reason why we are willing to sign-up for data plans?**
- **Even more apps: some people are even willing to pay for them; while much of the revenue will come from cunningly embedded ads**
- **Mobile sector specialists benefit from strong growth in mobile advertising; but can it deliver comparable revenues to online?**



Thank You



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