

# Global and China Mobile Phone Platform Industry Report, 2008-2009



Base band, the core of mobile phone platform, is also the key component of a mobile phone.

The year of 2009 will witness the prosperity of smart phone. With the increasing enhancement of hardware performance, a mobile phone will be more like a PC. In addition, as 3G is arriving, the mobile phone is marching into the mobile internet era, which indicates that more and more mobile phones will have open operating system and the function of full web browsing. Meanwhile, the success of iPhone has promoted more PC manufacturers focus on smart phones.

During the world's communication industry conference on Feb 16 2009, Acer announced eight new smart phone models, and the revenue from those eight models are expected to account for 10% of Acer's total revenue in the next three years, which is about US \$2billion. Moreover, Dell will also launch its own smart phone by the end of Feb 2009, Toshiba and HP will also tend to enlarge their smart phone investments.

Mobile phone platform manufacturers certainly have made more efforts on smart phone platform developments. In the middle of Feb, 2009, MediaTek announced its launch of MT6253, its first GSM/GPRS smart phone chip, which integrates the basic components like DBB, ABB, PM, and RF Transceiver, it also supports abundant multimedia functions such as camera, high speed USB and Class D audio power amplifier. Not like ASIC, the SiP packaging has made the success of such a high-integrated IC in a short term.

MT6516, another smart phone solution simultaneously launched by MediaTek, which supports WVGA LCD resolution, MPEG-2 decoding, and mobile phone TV application standards like CMMB, DVB-T, and DVB-H, by the integration of various video codec. And no doubt that MediaTek supports Windows Mobile.

Although it has been adopted by many smart phone manufacturers, Qualcomm's MSM72XX series was not originally designed for smart phone. In order to expand the smart phone market, Qualcomm launched the dramatically SNAPDRAGON platform focus on smart phones. So far, it has been adopted by Toshiba and HTC. Moreover, its CPU and DSP speed can respectively reach 1GHz and 600MHz, moreover, it supports WLAN, GPS, 12 million-pixel camera and mobile phone TV (including ISDB-T and DVB-H)

Marvell, the new entrant, it had acquired INTEL's mobile phone communication division at the cost of US \$600 million in 2006. Originated from XScale technology, Marvell's PXA processor series achieved a great performance in the high-end smart phone sector. Marvell had divided into two routes in 2008, one was PXA930, integrating application processor and 3G Modem; the other was application processor, including PXA310, PXA312, PXA320 and PXA168.

However, there are two sides regarding smart phones, one side insists to separate application processor and base band processor, while the other side claims to the integration. Apple, Nokia and Japanese manufacturers are supporting the former, while Sony Ericsson, Acer, HTC, BlackBerry, MOTO, Samsung and LG are for the other side. It also the main reason why Infineon, TI, ST, and NXP do not launch single-chip smart phone base band, because they are also the supporters of Apple, Nokia and Japanese Manufacturers.

Two big events had taken place in global mobile phone platform industry in 2008, one was mobile phone business integration of ST, NXP and Ericsson mobile phone platform (EMP), and the other was TI quits the general base band market.

In Apr, 2008, ST and NXP wireless division co-established a new company, which started its operation in the beginning of Aug, 2008. Then the new company starts to remerge the EMP (the revenue of EMP was US \$500 million in 2007FY), and the merger is expected to complete in 2009Q2. NXP, ST and EMP are respectively good at DSP operation and radio frequency, radio frequency and analog, and communication Modem.

TI had made significant adjustments to its mobile phone base band strategy on Oct 20, 2008. It planned to sell its general mobile phone base band division, which could save approximately US \$200 million expenditure each year, but it still maintained the division producing custom base band for manufacturers like Nokia. The main products of TI's general mobile phone base band division were LoCosto and eCosto, and the annual revenue of this division only accounted for 10% of TI's total wireless revenue in 2008, while the proportion for the custom base band division was 65%. It is expected the general mobile phone base band division will be sold out in 2009Q2; otherwise, TI will shut it up. However, TI will enlarge investment in custom base band sector, to compete with ST rather than quit.

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