

Wireless Communications Topical Report

Dramatic Shift in Applications Processor Landscape in 2009

By Tina Teng, Senior Analyst and Sharon Yang, Researcher

Forecast

Frequency, Time Period

- 5-year annual forecast by technology

Measures

- Revenues
- Units

Estimates Covered

- Handset Unit Shipment by Technology by OEM in 2009
- Digital Baseband shipment to OEMs by Technology by Vendor in Revenue
- Analog Baseband and Power Management shipment to OEMs by Technology by Vendor in Revenue
- Power Amplifier shipment to OEMs by Technology by Vendor in Revenue
- Radio Frequency shipment to OEMs by Technology by Vendor in Revenue
- Stand-alone Applications Processor revenue to OEMs by Vendor in Revenue

Applications/Products Covered

- Wireless
- Handsets

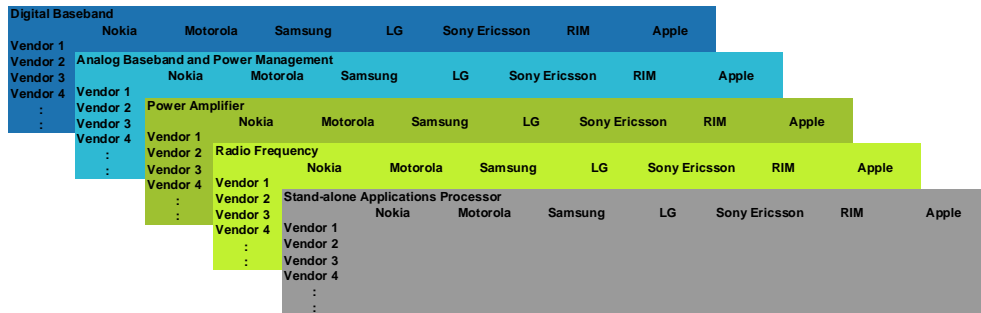
Technologies Covered

- CDMA/EVDO
- GSM/GPRS/EDGE
- WCDMA/HSDPA/HSUPA

Platforms have become a critical concept in the electronic system designs in both hardware and software. For OEMs, the benefits of adopting a platform include the elimination of system management and the costly testing iterations because platform adoption fosters the design reuse, which usually contributes a high-sunk cost. The reuse of a platform design also guarantees bulk purchase, which gives manufacturers a higher negotiation power with high-volume procurement. Margin is certainly important to OEMs; however, not all business decisions are made upon by costs. In reality, manufacturers look for hardware providers who have solutions to complement their device roadmap, the size of intellectual property portfolio, leadership in the technology development, and other similar characteristics.

This report describes the various supplier-management approaches employed by the major mobile handset makers to help chip makers understand how they can manage their customer relationships in order to get on the winning side of this trend. Areas covered in this report includes air interface decisions by OEMs, solutions offered by top semiconductor suppliers, trends in semiconductor features, and the nearterm outlook for the mobile handset industry.

OEM Vendor Relationship



Key Issues Addressed:

- What opportunities does each vendor have with tier-one handset OEMs?
- How is each OEM/vendor relationship decision made?
- What are the product roadmaps of the top semiconductor vendors?
- How do semiconductor vendors stay in the game?
- What can tier-two vendors do to win business with tier-one OEMs?

Applicable To:

- Handset Industry Participants
 - CEOs
 - CTOs
 - CMOs
 - Product marketing
 - Strategic marketing
 - Engineering
 - Production planning
 - Purchasing

Lead Analyst**Tina Teng, Senior Analyst**

At iSuppli, Tina is responsible for analysis and forecasting the mobile handset market.

Prior to joining iSuppli, Tina worked for Texas Instruments and MCI WorldCom. At Texas Instruments her main focus includes competitors benchmarking and database analysis. While working for MCI Worldcom as a data network engineer, Tina was responsible for test plan design, network testing as well as network management and integration.

Tina earned a Master of Science degree in Electrical Engineering from University of Texas at Dallas with concentration in Telecommunications and an MBA from the University of Texas at Austin.

Sharon Yang, Researcher

At iSuppli, Sharon will function as a researcher focused to support wireless communications team in handset demand, subscriber analysis, and technology roadmap.

Sharon has three years of experience in the computer industry with strong data analysis ability and international perspective. Sharon earned a Master of Commerce degree in Marketing and Logistics from University of Sydney, and a Bachelor of Science in Management of Information System from National Sun Yat-Sen University.

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