

## VisionMobile



tracking successful  
businesses in mobile

The 100 million club is the watchlist of software companies whose products have been embedded on more than 100 million mobile (cellular) handsets.

Updated semi-annually, the 100 million club celebrates software businesses who have succeeded in establishing a significant share in the mobile handset market.

Despite the apparent opportunity in the one-billion-a-year handset market, very few software companies have managed to overcome the commercial and technical challenges inherent in the mobile industry.

Based on our research, only 26 products from 21 companies have shipped on more than 100 million handsets up to the end of 2008. These figures underscore the complexity of the mobile market, at a time when over 7 billion handsets have shipped as of the end of 2008.

The companies featured in our 100 million club develop and license software for mass-market phones, with products ranging from text input engines to application environments. These companies come from diverse backgrounds, with annual revenues ranging from \$10 million to over \$10 billion. Out of the 21 companies in our 100 million club, 9 are US-based, 6 are headquartered in the Nordics and 3 in Japan.

For more analysis and insights on the 100 million club visit [www.100millionclub.com](http://www.100millionclub.com) or email us at [maps@visionmobile.com](mailto:maps@visionmobile.com)

### About VisionMobile

VisionMobile is an industry analysis firm in telecoms. We offer competitive landscape analysis, industry maps, on-site training and due diligence on under-the-radar sectors, focusing on mobile software and services.

### Research notes

- (1) Handset shipments refer to total licensed units which have been pre-loaded on handsets shipped by the end of 2008.
- (2) The % of handsets sold refer to the penetration of each software product in the base of handsets sold during 2H08.
- (3) Within 2008 we have seen ample consolidation within members of the 100 million club; Myriad Group includes the assets of Esmertec, Purple Labs and the Openwave browser. Nokia acquired Symbian, while Nuance acquired Zi Corp.
- (4) Our list does not include ARM, InnoPath and Sun who did not disclose shipments and the discontinued Obigo browser.

| company                         | product           | type                    | HQ          | handsets shipped (million) | handsets installed base with software embedded <sup>(1)</sup> |     |     |     |     |     |     |    |    |    | sales (%) | % of handsets sold <sup>(2)</sup> |     |     |     |
|---------------------------------|-------------------|-------------------------|-------------|----------------------------|---|-----|-----|-----|-----|-----|-----|----|----|----|-----------|-----------------------------------|-----|-----|-----|
|                                 |                   |                         |             |                            | 0   | 100 | 200 | 300 | 400 | 500 | 750 | 1K | 2K | 3K |           | 0                                 | 10% | 30% | 50% |
| <b>Application environments</b> |                   |                         |             |                            |   |     |     |     |     |     |     |    |    |    |           |                                   |     |     |     |
| Adobe                           | Flash Lite        | graphics runtime        | USA         | 961 E                      | [Bar chart showing installed base up to ~500M]                |     |     |     |     |     |     |    |    |    | 38%       | [Bar chart showing 38% sold]      |     |     |     |
| Aplix                           | Jblend            | Java                    | Japan       | 531                        | [Bar chart showing installed base up to ~500M]                |     |     |     |     |     |     |    |    |    | 8%        | [Bar chart showing 8% sold]       |     |     |     |
| Myriad Group                    | Jbed              | Java                    | Switzerland | 313                        | [Bar chart showing installed base up to ~300M]                |     |     |     |     |     |     |    |    |    | 9%        | [Bar chart showing 9% sold]       |     |     |     |
| <b>Browsers</b>                 |                   |                         |             |                            |   |     |     |     |     |     |     |    |    |    |           |                                   |     |     |     |
| ACCESS                          | Netfront          | browser                 | Japan       | 604 E                      | [Bar chart showing installed base up to ~500M]                |     |     |     |     |     |     |    |    |    | 15%       | [Bar chart showing 15% sold]      |     |     |     |
| Myriad Group                    | Browser           | browser                 | Switzerland | 1,930                      | [Bar chart showing installed base up to ~1,000M]              |     |     |     |     |     |     |    |    |    | 24%       | [Bar chart showing 24% sold]      |     |     |     |
| Opera                           | Opera Mobile      | browser                 | Norway      | 136                        | [Bar chart showing installed base up to ~100M]                |     |     |     |     |     |     |    |    |    | 2%        | [Bar chart showing 2% sold]       |     |     |     |
| Picsel                          | File Viewer       | document viewer         | UK          | 187 E                      | [Bar chart showing installed base up to ~100M]                |     |     |     |     |     |     |    |    |    | 5%        | [Bar chart showing 5% sold]       |     |     |     |
| <b>Middleware</b>               |                   |                         |             |                            |   |     |     |     |     |     |     |    |    |    |           |                                   |     |     |     |
| Beatnik                         | MobileBAE         | audio codecs            | USA         | 1,115 E                    | [Bar chart showing installed base up to ~500M]                |     |     |     |     |     |     |    |    |    | 21%       | [Bar chart showing 21% sold]      |     |     |     |
| BitFlash                        | Mobile SVG        | graphics engine         | USA         | 411                        | [Bar chart showing installed base up to ~400M]                |     |     |     |     |     |     |    |    |    | 18%       | [Bar chart showing 18% sold]      |     |     |     |
| HI Corp                         | Mascot Capsule 3D | graphics engine         | Japan       | 490 E                      | [Bar chart showing installed base up to ~400M]                |     |     |     |     |     |     |    |    |    | 7%        | [Bar chart showing 7% sold]       |     |     |     |
| Ikivo                           | SVG Player        | graphics engine         | Sweden      | 330                        | [Bar chart showing installed base up to ~300M]                |     |     |     |     |     |     |    |    |    | 8%        | [Bar chart showing 8% sold]       |     |     |     |
| Nuance                          | VSuite            | speech recognition      | USA         | 265                        | [Bar chart showing installed base up to ~200M]                |     |     |     |     |     |     |    |    |    | 8%        | [Bar chart showing 8% sold]       |     |     |     |
| NXP Software                    | LifeVibes MxMedia | multimedia middleware   | Netherlands | 540                        | [Bar chart showing installed base up to ~500M]                |     |     |     |     |     |     |    |    |    | 23%       | [Bar chart showing 23% sold]      |     |     |     |
| PacketVideo                     | CORE              | video codecs            | USA         | 260                        | [Bar chart showing installed base up to ~200M]                |     |     |     |     |     |     |    |    |    | n/a       | [Bar chart showing 0% sold]       |     |     |     |
| Red Bend                        | vRapid Mobile     | firmware update         | USA         | 475                        | [Bar chart showing installed base up to ~400M]                |     |     |     |     |     |     |    |    |    | 18%       | [Bar chart showing 18% sold]      |     |     |     |
| Scalado                         | CAPS              | graphics engine         | Sweden      | 311                        | [Bar chart showing installed base up to ~300M]                |     |     |     |     |     |     |    |    |    | 14%       | [Bar chart showing 14% sold]      |     |     |     |
| TAT                             | Kastor            | graphics engine         | Sweden      | 260                        | [Bar chart showing installed base up to ~200M]                |     |     |     |     |     |     |    |    |    | 10%       | [Bar chart showing 10% sold]      |     |     |     |
| <b>Operating systems</b>        |                   |                         |             |                            |   |     |     |     |     |     |     |    |    |    |           |                                   |     |     |     |
| ENEA                            | OSE               | real-time OS            | Sweden      | 1,450 E                    | [Bar chart showing installed base up to ~1,000M]              |     |     |     |     |     |     |    |    |    | 32%       | [Bar chart showing 32% sold]      |     |     |     |
| Mentor Graphics                 | Nucleus           | real-time OS            | USA         | 1,610                      | [Bar chart showing installed base up to ~1,000M]              |     |     |     |     |     |     |    |    |    | 34%       | [Bar chart showing 34% sold]      |     |     |     |
| Nokia                           | S60               | application framework   | Finland     | 206                        | [Bar chart showing installed base up to ~200M]                |     |     |     |     |     |     |    |    |    | 5%        | [Bar chart showing 5% sold]       |     |     |     |
| Nokia                           | Series 40         | operating system        | Finland     | 850 E                      | [Bar chart showing installed base up to ~800M]                |     |     |     |     |     |     |    |    |    | 19%       | [Bar chart showing 19% sold]      |     |     |     |
| Nokia                           | Symbian OS        | operating system        | Finland     | 262                        | [Bar chart showing installed base up to ~200M]                |     |     |     |     |     |     |    |    |    | 6%        | [Bar chart showing 6% sold]       |     |     |     |
| Open Kernel Labs                | OKL4              | virtualisation software | USA         | 250 E                      | [Bar chart showing installed base up to ~200M]                |     |     |     |     |     |     |    |    |    | 16%       | [Bar chart showing 16% sold]      |     |     |     |
| Qualcomm                        | BREW              | application framework   | USA         | 524 E                      | [Bar chart showing installed base up to ~500M]                |     |     |     |     |     |     |    |    |    | 9%        | [Bar chart showing 9% sold]       |     |     |     |
| <b>Input engines</b>            |                   |                         |             |                            |   |     |     |     |     |     |     |    |    |    |           |                                   |     |     |     |
| Nuance                          | T9                | text input engine       | USA         | 4,100                      | [Bar chart showing installed base up to ~4,000M]              |     |     |     |     |     |     |    |    |    | 56%       | [Bar chart showing 56% sold]      |     |     |     |
| Nuance                          | eZiText           | text input engine       | USA         | 660                        | [Bar chart showing installed base up to ~600M]                |     |     |     |     |     |     |    |    |    | 10%       | [Bar chart showing 10% sold]      |     |     |     |

sources: vendor data, VisionMobile estimates (E)

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knowledge. passion. innovation.