



Volume 12, issue 3
May 8 2014

In-depth analysis of WLAN, cellular and broadband wireless markets

Key Issues:

Latest Chrome launches show rising power of 'GoogleTel'	2
• AMD's mixed-core platform keeps all the design options open	11
Does NFV need a new IT architecture, and who will control it?	15

Comment:

Alibaba's mobile strength fuels IPO hopes, and global ambitions	22
Docomo signs six vendors for '5G' program	24
Apple should go after Google directly, says patent jury	26
Qualcomm pushes beacons for E911 indoor location accuracy	28
Nokia boosts Here with \$100m connected car fund	29
Google rejects buying its own spectrum for Project Loon	30

Start-Up Watch:

Start-up bypasses cellcos in licensed M2M services	31
--	----

M&A Watch:

Etisalat to offload west African units to Maroc Telecom	32
---	----

4G Watch:

FCC commissioner backs call for more Wi-Fi spectrum	33
---	----

Operator Watch:

Virgin at center of latest French mobile shake-up; Liberty's figures improve on quad play focus	34
---	----



Key Issues

Latest Chrome launches show rising power of 'GoogleTel'

- Intel makes a major bet on Chrome OS for post-PC leadership
- Will play a long game, as analyst calls for it to exit mobile altogether
- Meanwhile, Qualcomm infiltrates Surface, and AMD prepares first mobile push

Handsets and notebook PCs still account for the bulk of computing device sales, and will do so for years, but both are the victims of commoditization and margin collapse, and the latter is in slow decline. That means growth for the firms which have supplied most of the chips in these categories must come from new form factors, the 'post-PC' products which will combine the connectivity of smartphones with the computing and multimedia power of PCs and other consumer devices like consoles.

Intel and Qualcomm, as dominant powers in the older segments, have the added challenge of ensuring they are not just replacing one device type with another, perhaps at lower price points, rather than generating additional sales. So while it is vital for both to thrive in the post-PC market, in its fluid and unpredictable form, to offset the squeeze on their traditional device strongholds, they also face the challenge of companies which were not significant concerns in PCs or handsets, but may have a renaissance in tablets, Chromebooks, hybrids and so on.

AMD's extremely late entry into mobile processors, while largely the result of incompetence, could now be post-justified as waiting for the right moment, the market which the company could address with a unique solution, not a me-too. For the first time, with its new mix-and-match x86/ARM architecture potentially able to target any number of emerging form factors, it may be a genuine worry to Intel, rather than a useful cushion against accusations of x86 monopoly. Similarly, the particular strengths of Nvidia (graphics) and Broadcom (connectivity) may have greater impact in post-PC devices than they have done in handsets.

So the timing is awkward for the big two, and that's without the added problem of having to compete head-on with one another for the first time, both desperate to be the kingpin in larger-screened mobile computing devices. They will support almost any form factor, in the hope it will be the next big thing, and under their control. Sometimes this fails (Qualcomm's smartbook, Intel's UMPC), sometimes it succeeds, though often because they are really just extending an existing platform (Intel's Ultrabook, Qualcomm's tablet designs). The real deciders in this game will



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