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Google's Wireless Telecom Strategy. Mobile First - The Next Frontier for Google and Its Impact on the Industry.

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Abstracts

Google already sees more search performed using handsets than PCs in developing countries. Since the launch of its Android platform, over two dozen device manufacturers have committed to it. Shipments of Android phones exceed 60,000 devices a day and have doubled over the last quarter.1 Google announced a $750 million acquisition of Admob to further diversify its mobile search portfolio; so when Google's CEO, Eric Schmidt, asks the question "What next?" the answer is likely to be "To revolutionize the industry".2 Google's strategy, as described by Schmidt, is

"Mobile First". Essentially, the firm whose rise to prominence on the Internet has been primarily associated with its powerful search engine and cool branding concepts has now set its eyes on mobile. This report explores what this means for Google, and more importantly, for the industry at large. It addresses Google's impact on device OEMs, mobile OS platforms, as well as its growing role in the world of mobile communications; and analyzes the company's strategy both in the software (Android) and hardware (Nexus One) aspects. It offers a comparative chart of Google's Nexus One versus Apple's iPhone that illustrates the relative strengths and weaknesses of the two leading products in the smart phone market. It also talks about Microsoft's newly launched Windows Phone 7 series as the software giant tries to turn around its market share losing streak in mobile OS market.

The Company, whose name represents number one followed by a hundred zeros, has been quietly and rapidly morphing into a global communications behemoth, recently gaining a prominent role in the ever expanding world of wireless communications via Android, Nexus One, and its acquisition of AdMob, a mobile advertising play. Google's chief objective in the wireless world is to radically change the rules under which wireless

services are designed and offered. Fig. 1 is an illustration of how Google is positioning itself in the world of wireless communications.

Google's emerging role in wireless communications is taking shape vis-à-vis its strategy in cloud computing, which is being built around its Chrome browsing software (for an in-depth look at Google's strategy in cloud computing, please consult a report by Red Mobile entitled "Clouded by the Chrome: Google's Strategy in Cloud Computing. Chrome as Your Next Operating System.").

Google's ability to execute successfully on such a multi-pronged strategy, will determine the fate of its grand vision. In light of Android's increasing rate of adoption by wireless carriers (48 operators) and device makers (26 OEM3) as well as the launch of Google's first mobile device, Nexus One, Google's disrupting role will be increasingly felt in the market.

If executed successfully, Google's strategy can have far-reaching implications for makers of wireless devices as well as wireless telecom carriers.

One of the most important factors behind Google's unique success in executing its strategy has been the absence of legacy technology platforms. This has granted the company an ability to readily foster disruptive technologies and execute on their implementation effectively and efficiently. This is exemplified by the company's search capability that has enabled its continued growth and fueled its entry into other sectors of the communications industry such as wireless and cloud computing. Google has achieved this by using its core competency in search-based advertising as the chief enabler in introducing new products and services. The company's on-line advertising business is generating more revenue than the combined advertising revenues of broadcasting and print media in the U.S.

The suite of communication services offered by Google will impact telecommunications, e-commerce, office applications, and wireless broadband industries. An equally important development has been Google's business practices that aim to raise barriers to entry for existing and potential competitors. For example, processing search queries at the speed of light has been possible with the help of Google's billion-dollar investments in data processing centers. Immediate questions that arise are whether Google will be able to execute on its grand communications strategy and what kind of reaction it will spur from various competitors. So far the response has been more cooperative than counter competitive measures, evidenced by the growing adoption of the company's products in the wireless sector.

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The proceeding sections discuss such issues as Goolge's wireless strategy, its plans to market Android to device makers and carriers, and the company's competitive impact on mobile operating market (Android) as well as the device market (Nexus One). The report also explores Google's ability to compete with Apple in the device market with its much touted Nexus One mobile device and whether Android can enable Google to make a dent into consumer electronics market through licensing agreements with MIPS Technologies.

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