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Mobile Phone Baseband (Platform, Chipset) Industry Report, 2009

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Abstracts

The cell phone platform is composed of digital baseband, analog baseband, RF transceiver and power management. Herein, the report focuses on baseband.

Seen from competition layout of cell phone platform vendors in 2009, Qualcomm has taken the overwhelming advantages since it has always taken the lead both in 3G and 4G era. Qualcomm has the most complete product line, and the low-end QSC series target at CDMA2000 Feature Phone market; medium-end MSM62XX series aim at WCDMA Feature Phone market; and high-end MSM7XXX series are designed for smart phone market, besides, the top-end SNAPDRAGON serves for smart phone, MID, SMARTBOOK and netbook. Supported by Samsung, HTC and RIM in smart phone field, Qualcomm has enjoyed leadership in smart phone.

Nearly all cell phone platform vendors have been faced with bottleneck, and there is no exception to MediaTek. Reaching agreement with Qualcomm, MediaTek need not to pay for patent royalty. However, MediaTek has two types of clients, the small and medium customers are unwilling to pay Qualcomm high royalties due to their quite meager profits; while big clients have already reached an agreement with Qualcomm, and the patent fees have paid till the year of 2015 or even longer, so to make the purchase directly from Qualcomm will cost less. Therefore, it is impossible for MediaTek to successfully explore WCDMA market via MT6268. MediaTek lies hopes in TD-SCDMA but has protocol stack subject to Datang.

MediaTek still dominates 2G market, since it has successfully entered supply chain of Samsung, LG and Motorola, and it has contributed to over 45% in the markets except mainland China. In the meantime, MediaTek has also well performed low-price but not low-end cell phone market. Therefore, MediaTek's success doesn’t rest with its

powerful baseband and software, but its overall technology layout. MediaTek not only provides baseband, but also a series of products such as RF, power management, touch screen controls, Bluetooth, and FM radio. In addition, the latest MT6253 includes Class-D audio amplifier. In cell phone IC, MediaTek can supply all parts except PA and memory.

Spreadtrum acquired Quorum but not succeeded in developing suitable RF IC for baseband, and Mstar just has baseband products, so MediaTek's comprehensiveness cannot be replaced. MediaTek should pay more attention to the good yield of MT6253 motherboard, and its special aQFN packaging has not been massively validated yet, so it will take time for MediaTek to learn how to quickly achieve high yields. This brings opportunities to Spreadtrum and Morningstar, yet both has demerits in product singleness, heavily depending on the mainland market.

With bright future, ST-ERICSSON’s participation will win advantages in competition with Qualcomm. EMP, with the perfect 3G and 4G RF technology, firstly launched LTE data card. ST has great strength in analog and RF sector, providing analog baseband, RF, Bluetooth and WLAN for Nokia for a long period. NXP has the powerful strength both in power management and in DSP field; and its subsidiary, T3G, is the monopoly in TD-SCDMA area. In smartphone field, ST-ERICSSON U850 has excellent performance enough to compete with Qualcomm MSM7XXX series, and even better in video performance. The high-end platforms of U365, U360 and U330 also perform exceedingly well. PNX52XX and PNX6XXX, inherited from NXP, have higher cost-efficiency and maturity, are the favorites of Samsung and LG. Yet, Samsung and LG enjoy the expanding market shares.

Infineon, once the world’s largest RF transceiver vendor, has strong ability in RF field, and performs well in 4G era as well. What’s more, Infineon is adept in integration, manufacture and IC packaging, always supplying baseband to Apple. In the ultra-low-cost mobile phone area, Infineon's superior integration capabilities have gained the acceptance from Nokia.

TI is declining and totally reliant on OMAP application processors in 3G era, while Qualcomm's MSM7XXX and SNAPDRAGON have successively encroached OMAP market share. However, the long cooperation with Nokia has maintained its revenue still be over $1.5 billion since Nokia platform has a long conversion cycle, and more than 75% products still employ the old platform.

Broadcom has been unable to grow up, and its cell phone platform revenue just accounts for less than 5% of its total revenue. Moreover, its largest customer, Sony Ericsson, has sharply cut down its shipment.

The cell phone design companies, once the best partners of cell phone platform vendors, have become completely different, and in strict sense, have disappeared. For instance, TechFaith Wireless, once the largest cell phone design company, the revenue in cell phone design sector just accounted for less than 2% in its total revenue in 2009. The products of cell phone design companies are no long design plans, but specific products, usually the package or cell phone, and the majority of cell phone design companies have pilot production line. Then cell phone manufacturers can concentrate on brand and sales since cell phone design companies have solved all problems in products. However, large-scale mass-production is still undertaken by veteran EMS manufacturers.

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