Instant Messaging and Wireless Presence

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Market Opportunity

- Instant Messaging is just the beginning
  - Popularity is indicator of customer desire for presence
    - 623 million worldwide instant messaging users by 2003 (IDC)
    - Wireless messages sent per month will balloon from 3 Billion in 2000 to 244 Billion by 2005 (Cahners)
  - Wireless internet users will benefit from presence
    - Cell phones, pagers, PDA's, network appliances
    - By 2004 3 Million two-way pagers will be used in the US (Forrester)
  - Peer-to-Peer (P2P) enabler
- Presence will be as pervasive as e-mail
  - 1.3 Billion wireless Internet users by 2004 (Source: Cahners InStat)
  - Presence is viral and grows exponentially - "network effect"
  - All wireless devices and applications will use presence
- Increased business/corporate spending
  - Wireless application spending among North American enterprise businesses will increase six-fold in the next two years to $878 million (Source: Research Portal.com)

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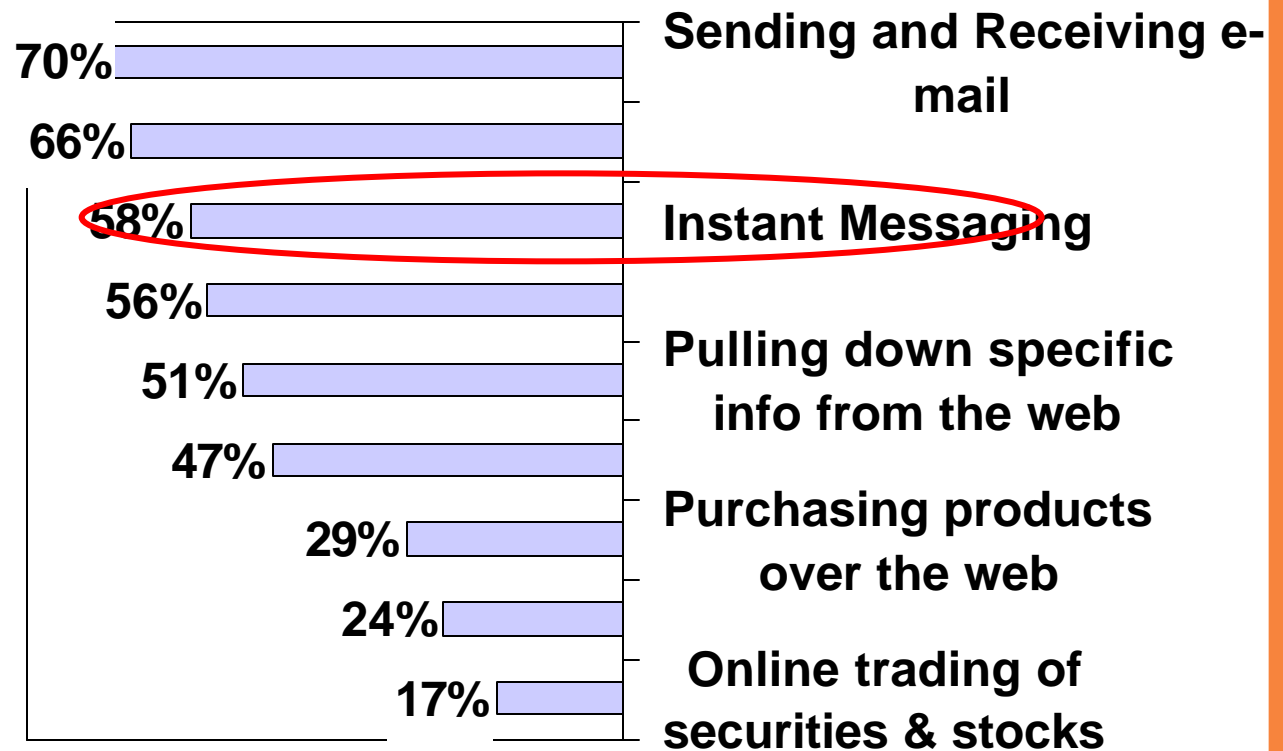*The Mobile IMPS Initiative*

IM Market Demand

Instant Messaging is 3rd most desired Internet Application on a wireless phone

IM is #1 feature on Smart phones for both mobile professionals and mobile consumers

Researchportal.com

Most Desired Internet Applications on a Wireless Phone

Application	%
Sending and Receiving e-mail	70%
	66%
Instant Messaging	58%
	56%
Pulling down specific info from the web	51%
	47%
Purchasing products over the web	29%
	24%
Online trading of securities & stocks	17%

Source: Cahners In-Stat Group 9/00

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Wireless IM Market Projections

Year	End users (millions)	Value (US$ millions)
2001	3.2	40
2002	11.2	135
2003	23.3	256
2004	43	363

Source: IDC Report July 2000

- IM is #1 favorite "Forward Looking" wireless Internet feature for Mobile Consumers
  Researchportal.com

- 46% of all Fortune 1000 companies plan to implement IM by the end of 2001 Forrester Research

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Instant Messaging and Presence in a Mobile World

- Huge growth of SMS
  - Usage patterns in Europe
  - Highly successful business model
- Huge growth of desktop IM
  - AIM/ICQ (130M registered/40M active)
  - Yahoo (10-15M registered users)
  - MSN (10-15M registered users)
- Lack of a common standard
- Success of recent wireless industry coalitions
- Pent-up demand for interoperable mobile solution

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Current Standards Status

- Numerous efforts started
  - Some progressing
  - Some inactive
  - Some proceeding slowly
  - PAM, 3GPP, IETF, IMUnified, WAP Forum
- Fragmented focus
  - None focused on mobile requirements
  - Lack of end-to-end solution
- Industry needs a mobile solution NOW!

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What the User Wants

- A positive user experience
- Presence indication
  - "my friends are available to chat!"
- Contact list-based experience
  - Presence information at a glance
- Device to device, device to PC messaging
- Universal name-space
- Real-time messaging
- Access Control

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What the Operator Wants

- Operator can build their own communities
- Based on SMS growth pattern, business model
- Wireless optimized, bearer independent protocol
- Standards based, interoperable, backwards compatible
- An application for 2.5G and 3G
- Operator control of traffic on their network
- Specifies a new platform at the carrier site
- New revenue stream for whole value chain

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Today's Wireless Landscape Is Changing

Rapid expansion of mobile data services:

- Internet and wireless domains
  are converging

- Tremendous SMS adoption rates
  and lucrative business model

- Mobile consumers and professionals
  are asking for new wireless applications

- Operators need to leverage
  their investment in 2G, 2.5G and 3G spectrums

- Operators are extending their brand
  to consumers via portals and new services

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Wireless Village

- A new industry initiative for mobile instant messaging and presence services (IMPS)
- Ericsson, Motorola and Nokia collaborating to ensure interoperability of wireless messaging, instant messaging and presence services

Characteristics of the Wireless Village solution:

- An open industry specification to support partnerships
- Provides interoperability across devices
- Enables operator to build persistent communities
- Leverages existing Internet and Web technologies

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What Is The Wireless Village Solution?

The Wireless Village initiative's Instant Messaging and Presence Services (IMPS) includes four primary features:

- Presence
  - Client device availability, user status, location, client device capabilities and searchable personal statuses such as mood and hobbies

- Instant Messaging
  - A familiar concept in both the mobile and desktop PC worlds; interoperable mobile IM in concert with other innovative features to provide a new user experience

- Groups (or chat)
  - A fun and familiar concept on the Internet

- Shared Content
  - Allows users and operators to set up their own storage area where they can post pictures, music and other multimedia content to share with others

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Who Benefits From The Wireless Village Solution?

- ## Consumers
  - The Wireless Village solution will work from any device, be it a mobile phone or desktop PC, on any network, anywhere

- ## Device Manufacturers
  - Only a single protocol to implement to support a common set of widely adopted features, low power consumption, storage space, memory and cost

- ## Service Providers
  - Need to deploy a single server solution that will address multiple customer needs while interoperating seamlessly across multiple devices

- ## Application Developers
  - A common framework upon which can be built new services for presence, messaging, group and content delivery

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Goals Of The Wireless Village Initiative

- To ensure interoperability of mobile instant messaging and presence services

- While building community both around the initiative and through the deployment of innovative new IMPS services

- Help the wireless operator succeed in attracting and retaining customers address both the network operators requirements and the end-users needs

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Conclusions

- A community building effort
  - Building a community of technology companies around a common standard
  - Enabling service providers to build their own persistent end-user communities
- An industry leading initiative
  - Comprehensive solution that leverages a standards-based approach to wireless instant messaging and presence services
- The Wireless Village supporters are leaders in wireless communications solutions

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