Opera leading the way in full Internet

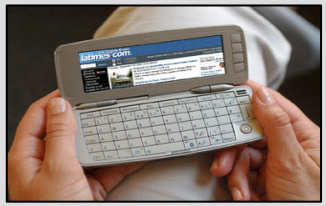
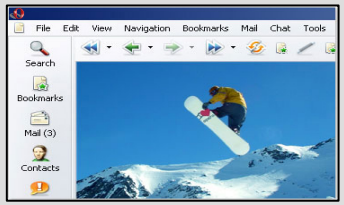
Kai Leppänen

Vice President, Mobile

Agenda

1. Introducing Opera to III VAS audience
2. Mobile Product Portfolio
3. Web vs WAP
4. Web vs WAP Proof of Concept

Opera's Mission

Deliver the best possible Internet experience to all Internet users, regardless of geography and skill levels, across all devices.

Opera for Desktop

Multiplatform desktop browser for Windows, Linux and Mac.

Opera for Mobile

Web browser solutions for any mobile phone.

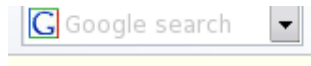
Opera for Devices

Embedded browser for verticals, TV, game consoles and IP solutions.

Focus	R&D Desktop	R&D Internet Devices	Commercialisation	Expanding in the value chain
Innovation	Keyboard navigation Multiple Documents Image zooming Mouse Gestures	Cross-platform development Porting to EPOC Focus on Modularisation Opera Show	Small Screen Rendering Footprint reduction Spatial navigation Smart frames Table magic DOM/BIDI for Smartphones	Opera Platform Multimodal ERA Web forms Home Media

1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005

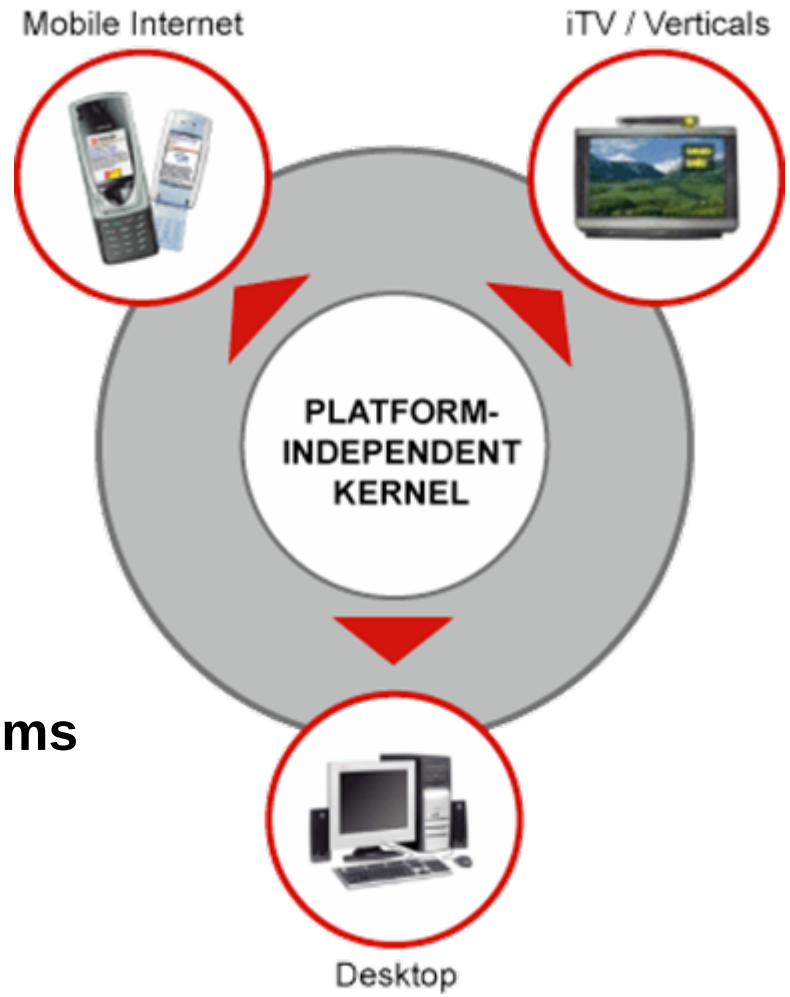
Features



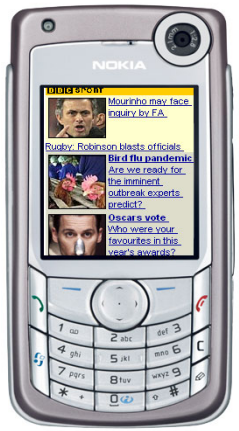
Products

Opera is already in a range of platforms…

- Desktop computers
- Laptops
- Gaming consoles
- TVs
- Set top boxes
- Mobile phones
- Personal communicators
- Portable media players
- PDAs
- In-flight entertainment systems
- Web tablets
- IP screen phones



Opera’s Reformatting Technologies



176x208	320x240	700x512
SSR	MSR	TVR
Extensible Rendering Architecture (ERA)		

Our rendering technologies adapts content of a web page dynamically to fit any screen orientation and resolution

“[Opera's] new software will help transform the wireless Web from a misnomer into a reality.”

The Economist, 2005

Opera for Mobile

Web browser solutions for any mobile phone.

Opera Mobile: Same code base – 3 products

Opera Mobile Widgets

Device independent platform for mobile web applications

Opera Mobile

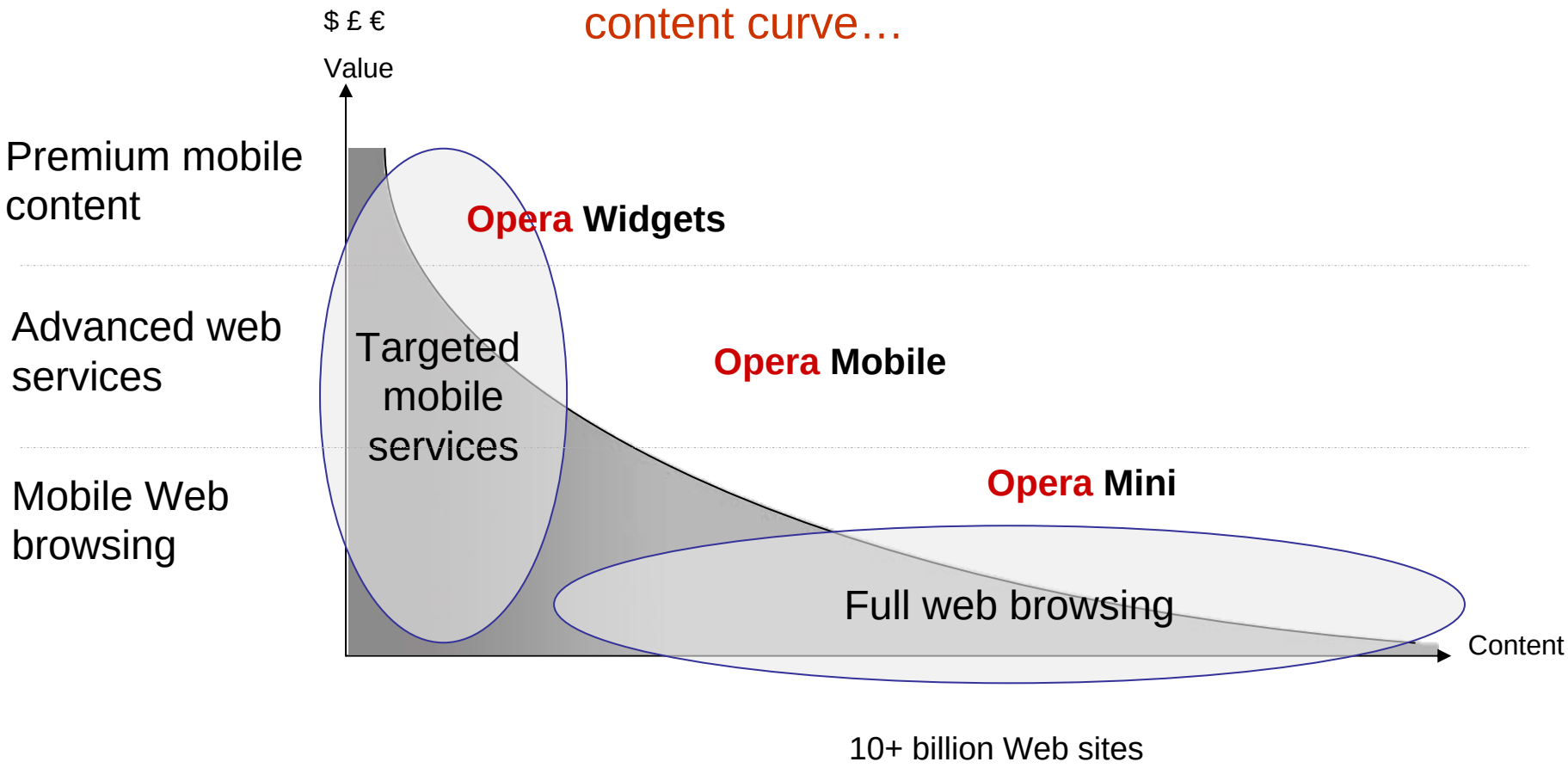
Full web client browser for Smartphones

Opera Mini

Light java browser for mid-tier and feature phones

Why Mobile browsing?

Service providers need a strategy for the full content curve…



Experience since Worldwide release in Jan. 2006

+7 million unique active users since launch

Page compression to 10-15% of actual desktop size

Over +2 billion pages downloaded

Average downloads 10- 15 pages per user per day

"Norway's Opera Software……, recently unveiled what's quickly become recognized as the best cellphone Web browser yet, known as Opera Mini"

Matthew Maier, CNN.com

"This is a really big breakthrough for the mobile space."

Michael Gartenberg, Jupiter Research

Product Architecture

Opera Mini

Small Java application

- Browser user interface
- **OTA deployment**: download with phone browser from http://mini.opera.com
- MIDP 1 & 2: 50-100KB

Opera Mini Server

Compressed traffic via OBML*

Featuring full Opera browser engine to:

- **Render page** with Opera Small Screen Rendering
- **Minimize traffic volume** and **improve loading time**
- **Provide billing information** to trusted web sites

Internet

HTTP(s)

Web & WAP content

* OBML: Opera Binary Markup Language – a compressed, binary representation of the page rendered by Mini Server

General Commercial Models…

Option 1: A Royalty free Generic version of Opera Mini can be distributed by selected partners

- **Opera provides license-free Hosted download server and proxy solution**
- **Partner provides marketing and device pre-installation**

Price: Distributor only pays yearly Support & Maintenance

Option 2: Partners licenses a Custom or Branded versions of the application and promote their own services

Opera offers:

- **Hosted server solution**
- **Client customization & branding services**
- **Support & Maintenance**

Price: Dependant on volumes and level of customization

31 Models shipping with Opera in 2006

*: Only in Cingular's network
**: Only in T-mobile's network

Last updated: Aug 30, 2006

2000-2003

- Sendo X
- Nokia 6600
- Sony Ericsson P900
- Motorola A920
- Sharp Zaurus
- Sony Ericsson P800
- Sharp Zaurus
- Psion Revo
- Nokia 9210

2004

- Nokia 7710
- Casio W21CA
- Nokia 6620*
- Nokia 9300
- Motorola A780
- Sony Ericsson P910
- Motorola A1000
- Nokia 7610
- Nokia 9500
- BenQ P30
- Nokia 7700
- Kyocera PS 900
- Sharp SL-6000

2005

- Motorola A1200
- Sharp W-ZERO3
- Nokia 9300i
- Toshiba W32T
- Sony Ericsson P990
- Nokia 6630**
- Kyocera WX 300K
- Kyocera WX 310K
- Kyocera AH-K3002V
- Nokia N70
- Nokia N90
- T-Mobile SDA II**
- Motorola E895
- Motorola E680i
- Hitachi W32H
- Nokia 6682
- Nokia 6681
- Nokia 6680**
- Toshiba W31T
- Casio W31CA
- Casio W21CA II
- ZTE e3
- Motorola M1000
- Motorola A1010

2006

- Sharp W41SH
- Toshiba W45T
- Sanyo W42SA
- Kyocera W44K
- Motorola RAZR V3x **
- MOTORAZR maxx
- MOTORAZR xx
- Nokia N70**
- Sharp W-ZERO3[es]
- Sony Ericsson M608c
- Nokia N72
- Toshiba W44T
- Hitachi W42H
- Casio W42CA
- Sony Ericsson W42S
- Sanyo W33SA II
- Sanyo E02SA
- Toshiba W43T
- Sony Ericsson W950
- Sony Ericsson M600
- Hitachi W41H
- Casio W41CA
- Sony Ericsson W41S
- Motorola ROKR 2

2006 cont'd

Opera Mini™

- Nokia 6233**
- Sony Ericsson W810i**
- Nokia 6131**
- BenQ-Siemens EL71**
- BenQ-Siemens EF81**
- Sony Ericsson K608i**
- Nokia 6280**
- Motorola RAZR V3i**
- Motorola RAZR V3 **
- Motorola L7**
- Hitachi W43H
- Toshiba W47T
- Toshiba DRAPE
- Casio W43CA
- Sanyo W43SA
- Sony Ericsson W43S
- Kyocera W43K

Opera Mobile Widgets

Multiplatform Web Applications
for Mobile Phones

Opera Mobile and Opera Widgets

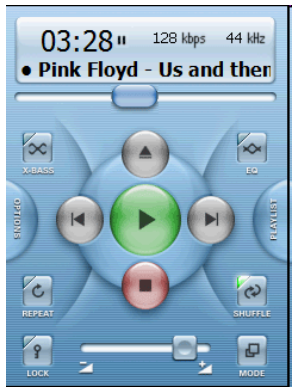
A regular mobile browser

Browser-based application platform

Premium service delivery

Service delivery

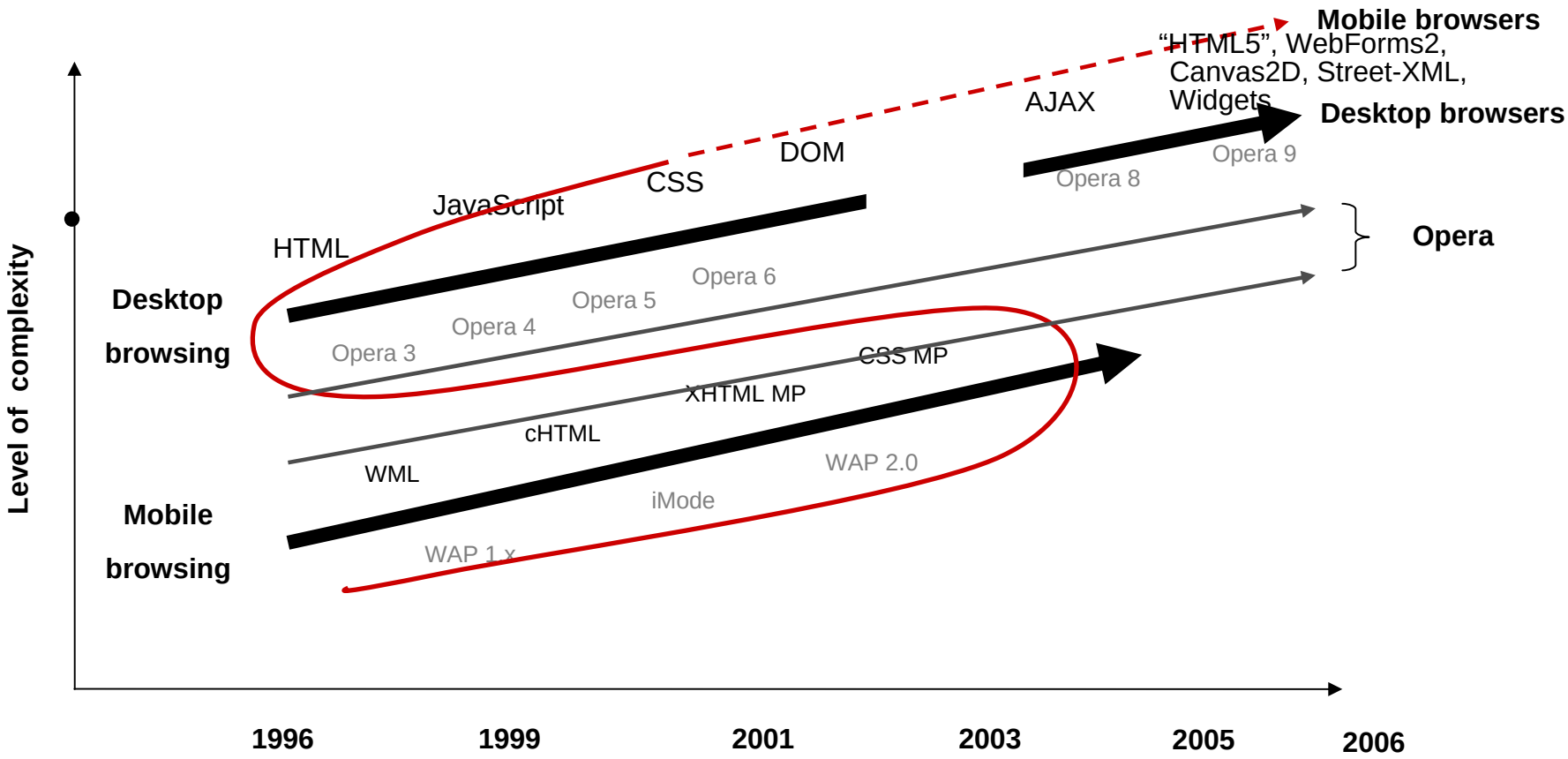
On-device Portal



Rich Media integration

Sony Ericsson
TV Guide
Sony Ericsson
Shop In Theaters Categories
Features Rental Guide DVD
Reviews
Wednesday, October 06, 2004 |
Welcome to Reel.com! | Sign
up for our e-mail newsletter

WAP vs WEB


Mobile browsers
“HTML5”, WebForms2,
Canvas2D, Street-XML,
Widgets
AJAX
Desktop browsers
DOM
Opera 9
Opera 8
CSS
JavaScript
HTML
Opera
Opera 6
Opera 5
Opera 4
Opera 3
Desktop
browsing
CSS MP
XHTML MP
cHTML
WML
WAP 2.0
iMode
Mobile
browsing
WAP 1.x
Level of complexity
1996
1999
2001
2003
2005
2006

Proof of Concept

How Mobile Network Operators increased ARPU and competitive position using the Opera browser

Web Browsing in Different Market Environments

Competitive environment	Strategic implications
• **Fierce competition** vs. Vodafone & market leader NTT DoCoMo • **Saturated market** • 3G networks & high-tier handsets available	• Competitive edge required in order to **gain sufficient market share to compete with DoCoMo**
• **Incumbent** German operator with inter-national operations • **Duopoly** situation with Vodafone • **Saturated market** • 3G networks & high-tier handsets available	• Competitive edge required to **defend market leader position**

Web Browsing provides KDDI and T-Mobile with

- **an additional boost in Data ARPU and**
- **a competitive edge in an increasingly tough market**

All KDDI EV-DO BREW Terminals Feature Opera

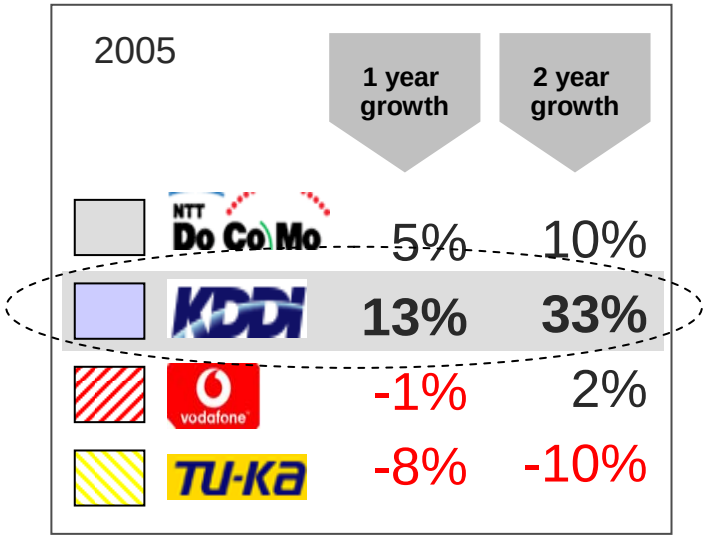
- **27 devices** from **5 vendors** shipped through November 2006
- **KDDI enables their complete EV-DO portfolio**

2004	2005		2006		
2H	1H	2H	1H	2H	
W21CA	W21CA II	W31CA	W41CA	W42CA	W43CA
	W31T	W32T	W43T	W44T	W45T, W47T, DRAPE
		W32H	W41H	W42H	W43H
			W33SA II	E02SA	W42SA, W43SA
			W41S	W42S	W43S
					W43K, W44K
					W41SH

KDDI is Japan's Fastest Growing Carrier

- KDDI has always faced fierce competition from industry giants DoCoMo and Vodafone…
- …but since the introduction of 1XRTT & EV-DO networks, KDDI has been Japan's growth leader in 2004 and 2005

Annual Revenue



Web Browsing with Opera Mobile has

- become a core service for KDDI's EV-DO based services

- and helped drive 2-digit growth rates in a mature and saturated market

Sources: Telecom Carriers Association Japan, KDDI IR

Web Browsing in Different Market Environments

Competitive environment	Strategic implications
KDDI / au by KDDI	• **Fierce competition** vs. Vodafone and market leader NTT DoCoMo • **Saturated market** • 3G networks & high-tier handsets available	• Competitive edge required in order to **gain sufficient market share to compete with DoCoMo**
T-Mobile International / web'n'walk	• **Incumbent** German operator with inter-national operations • **Duopoly** situation with Vodafone • **Saturated market** • 3G networks & high-tier handsets available	• Competitive edge required to **defend market leader position**

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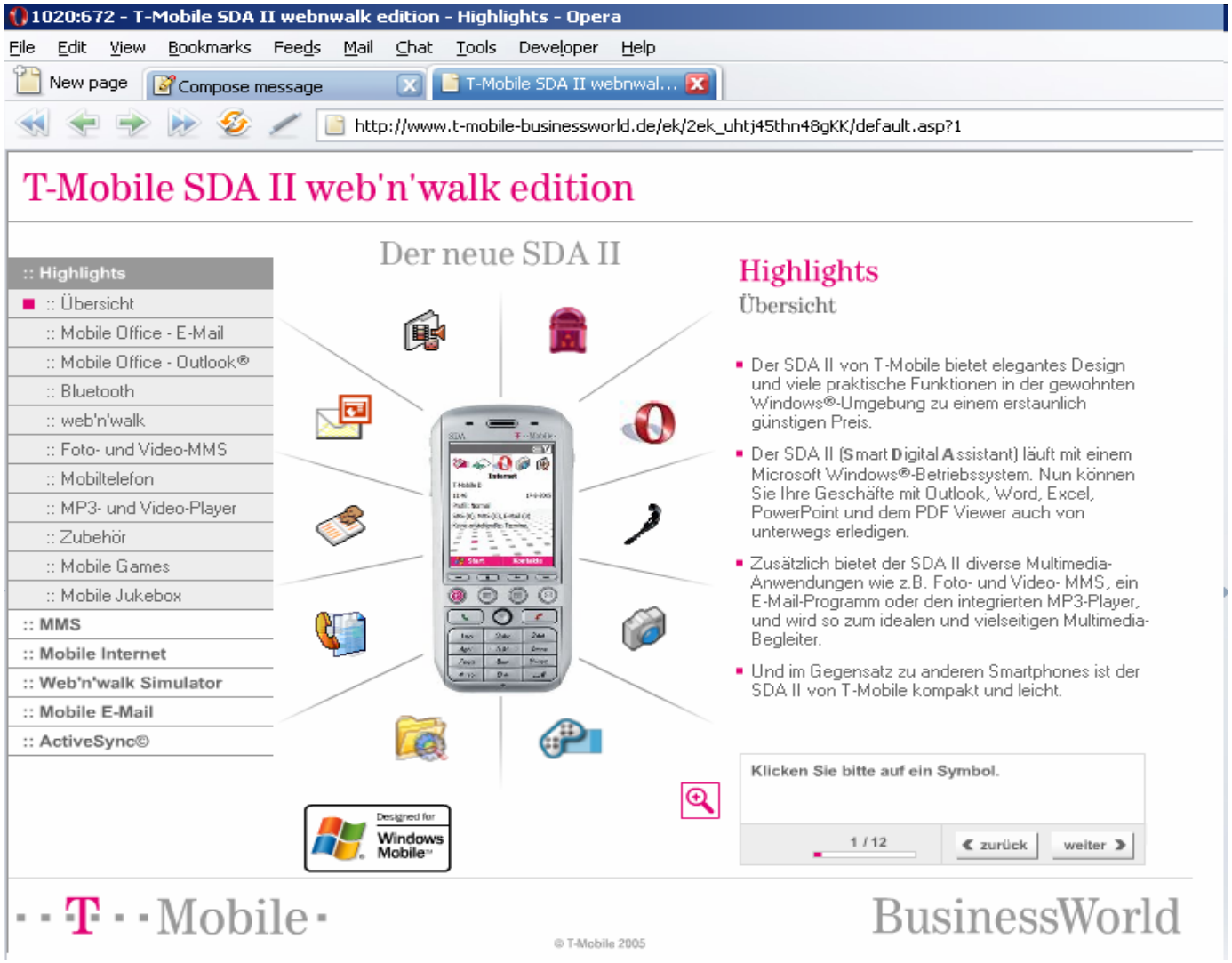
Web’n’walk - Operators moving towards HTML



Web ‘n’ Walk Utilizes Opera Mini to Enable Additional Handsets

Opera Mobile Browser

Opera Mini

2005

Q2

NOKIA 6680

Q3

NOKIA N70 6630

HTC Engineering Mobility SDA II

2006

Q1

MOTOROLA RAZR V3/V3i SLVR L7

Sony Ericsson K608i

NOKIA 6280

Q2

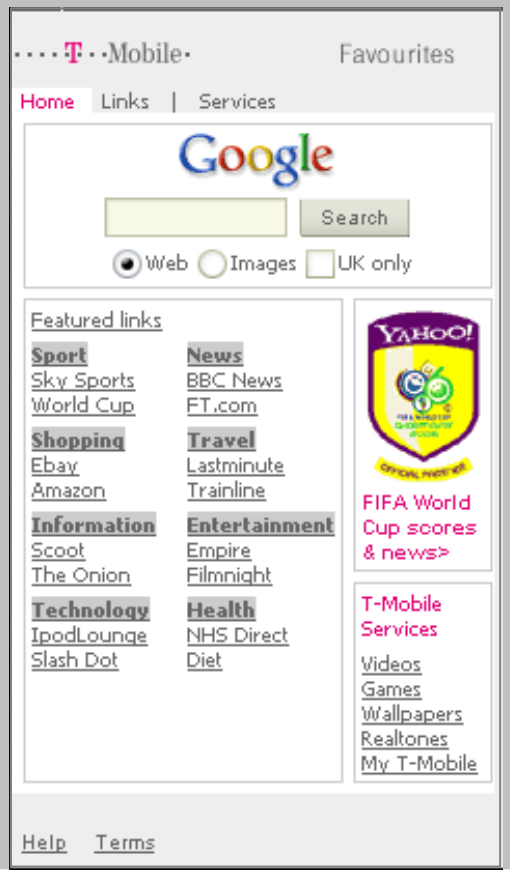
Sony Ericsson W810i K510i W300i

NOKIA 6131 6233

BenQ-SIEMENS EL71 EF81

Opera Transformed Portal Browsing Into Full Web Browsing

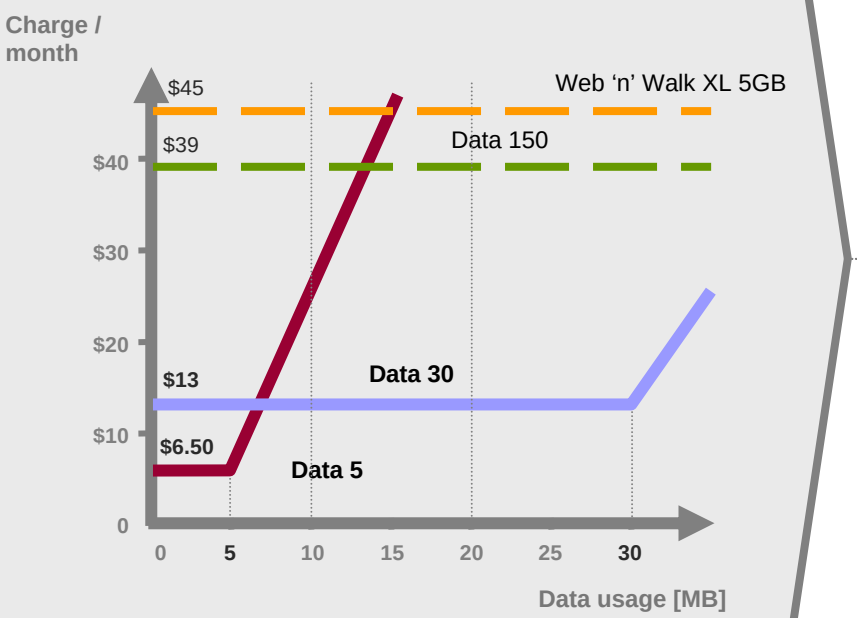
Start page offers all T-Mobile and co-branded services in one UI:
- Google search
- Web links
- Portal services



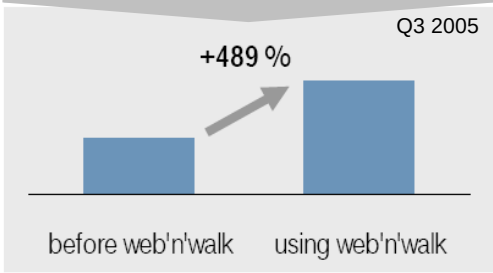
Web links

T-Mobile International Web ‘n’ Walk Drives ARPU Increase

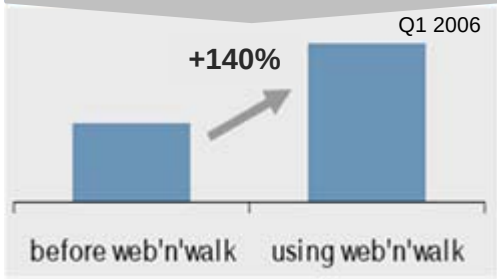
T-Mobile web 'n' walk **Pricing*:**



Data volume / user



Data APRU (excl. SMS) / user



- **Significant increase in ARPU after 1st quarter of launch**
- **Web 'n‘ walk customers were visiting 330 Internet pages per month**

* Example T-Mobile Germany. This offer includes use of PC modem connection and is in addition to any voice plan

Opera Powered Solutions
Proof of Concept continued from Opera for ‘Devices’ point of view …

Sony Mylo

SONY
Track Name: my life online
Artist Name: mylo
COM-1
003:12
12:34PM
Num
Sym
Back Space
Enter
Shift
Space
BACK
What's Up Screen
Music
Communication
Web
Photo
Text
Voice Memo
Tools
12:34 pm
SONY

Archos 604 WiFi & PMA400

"Opera is a very valuable partner for us and its browser is an asset to our product."
- Henri Crohas, ARCHOS Founder & CEO

Nokia 770

"In short, the Nokia 770 offers by far the best Internet browsing experience of any handheld device I've ever used."

- Eric Bangeman, ArsTechnica.com

Nintendo Wii

"For our Wii console launch in 2006, we required a browser that was fast and secure with support for the latest standards including AJAX. Opera proved perfect for our purposes and is an exceptional addition to both the Nintendo DS and the Wii console."
- Genyo Takeda, Senior Managing Director and General Manager, Integrated Research & Development Division, Nintendo Co., Ltd.

Nintendo DS & DS Lite

"Opera exceeded our expectations with its user friendly interface, quick access to all your favorite sites, ease of use and, most importantly, in making the best use of the Nintendo DS system's unique double screens and touch screen features. Opera is an important partner for Nintendo in our efforts to further expand the users of the Nintendo DS."

- Masaru Shimomura, Deputy General Manager of Nintendo's R & D Department

Amino AmiNET103,110,125,125i,130

"Its industry-leading support for the W3C Web standards and its remarkable performance make Opera an attractive choice for better browsing and advanced user interfaces on Amino's AmiNET110 and our upcoming next generation set-top boxes.“
- Roy Kirsopp, VP & General Manager, Amino

Iwatsu Corporate IP Phone Solution Including Opera Powered Phones by Quanta

Thales TopSeries In-flight Entertainment

"The Opera product is an excellent fit to our system architecture. It provides the flexibility and utility that our customers are asking for."

- Brad Foreman, Vice President and General Manager for Thales

Dreampark Dreamgallery IPTV Solution

THANK YOU!

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Please download Opera 9 and Opera Mini from www.opera.com