Final Report on implementation of the MoU regarding Harmonisation of a Charging Capability for Mobile Phones

Update to TCAM-EG complementing the oral report at TCAM-EG 02

February 18, 2013

[redacted] on behalf of MoU Signatories

MoU Standards Update

- ETSI EMC
  - EN301489-34 V1.1.1 (2010-10)
    - OJEU publication as R&TTED harmonised standard Dec 29, 2010
    - OJEU publication as EMCD harmonised standard Feb 24, 2011
    - Prsumption of conformity until Feb 28, 2014.
  - EN301489-34 V1.3.1 (2012-05)
    - OJEU publication as R&TTED harmonised standard Oct 23, 2012
    - OJEU publication as EMCD harmonised standard Oct 23, 2012
    - Changes compared with V1.1.1:
      - Continuous phenomena performance criteria excludes of ripple voltage
      - Numbering alignment with part 1
- CENELEC
  - EN62684 is frozen however revision is needed
    - Alignment with Annex III of the MoU
    - Progress in display technology (Common Mode Noise)
    - Development in USB IF specifications (USB PD)

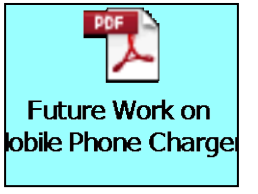
Implementation Status

- Market situation (2nd Half of 2012):
  - All MoU Signatories shipping into the EU market has launched compliant chargers and met their obligations under the MoU
  - MoU Signatories and other manufacturers continue to increase % of devices with common charger interface in the EU. It is now estimated that ~ 90% of new devices by the end of 2012 have such interface
  - O2 in the UK has launched pilot to ship smartphone w/o charger in the box
  - Penetration of smartphones in the EU market continue to increase covering more than 80% in some of the members states markets
  - While the global mobile phone sale was flat in 2012 smartphones sale grew by nearly 40%

  - Public information about market share attached at end of this report

MoU Termination and Future Work

- MoU terminates by the end of 2012
  - MoU Signatories concludes that the MoU has resolved the fragmentation issue in the market and that no extension is required
  - Discussion with the EC on future commitment
- DIGITALEUROPE position on future work on mobile phone chargers
  - Revision and amendment of standards to include future power needs of mobile devices
  - Provide input to international/regional standards as well as global recommendations
  - Revision of the Code of Conduct on Energy Efficiency of External Power Supplies
  - Progress report on standards development and market situation every 6 months



Global Market Shares I

Worldwide Mobile Phone Sales to End Users by Vendor in 4Q12 (Thousands of Units)

Company	4Q12 Units	4Q12 Market Share (%)	4Q11 Units	4Q11 Market Share (%)
Samsung	106,957.7	22.7	93,830.3	19.6
Nokia	85,054.8	18.0	111,699.4	23.4
Apple	43,457.4	9.2	35,456.0	7.4
ZTE	16,160.6	3.4	18,915.1	4.0
LG Electronics	14,981.3	3.2	16,938.3	3.5
Huawei Technologies	13,679.1	2.9	13,966.1	2.9
TCL Communication	11,097.6	2.4	10,695.3	2.2
Lenovo	8,305.4	1.8	5,206.3	1.1
Sony Mobile Communications	7,946.6	1.7	8,935.7	1.9
Motorola	7,822.2	1.7	10,075.3	2.1
Others	156,613.7	33.2	151,985.1	31.8
Total	**472,076.4**	**100.0**	**477,703.0**	**100.0**

Source: Gartner (February 2013)

Global Market Shares II

Worldwide Mobile Phone Sales to End Users by Vendor in 2012 (Thousands of Units)

Company	2012 Units	2012 Market Share (%)	2011 Units	2011 Market Share (%)
Samsung	384,631.2	22.0	315,052.2	17.7
Nokia	333,938.0	19.1	422,478.3	23.8
Apple	130,133.2	7.5	89,263.2	5.0
ZTE	67,344.4	3.9	56,881.8	3.2
LG Electronics	58,015.9	3.3	86,370.9	4.9
Huawei Technologies	47,288.3	2.7	40,663.4	2.3
TCL Communication	37,176.6	2.1	34,037.5	1.9
Research In Motion	34,210.3	2.0	51,541.9	2.9
Motorola	33,916.3	1.9	40,269.1	2.3
HTC	32,121.8	1.8	43,266.9	2.4
Others	587399.6	33.6	595886.9	33.6
Total	**1,746,175.6**	**100.0**	**1,775,712.0**	**100.0**

Source: Gartner (February 2013)

Global Market Shares III

Worldwide Smartphone Sales to End Users by Operating System in 4Q12 (Thousands of Units)

Operating System	4Q12 Units	4Q12 Market Share (%)	4Q11 Units	4Q11 Market Share (%)
Android	144,720.3	69.7	77,054.2	51.3
iOS	43,457.4	20.9	35,456.0	23.6
Research In Motion	7,333.0	3.5	13,184.5	8.8
Microsoft	6,185.5	3.0	2,759.0	1.8
Bada	2,684.0	1.3	3,111.3	2.1
Symbian	2,569.1	1.2	17,458.4	11.6
Others	713.1	0.3	1,166.5	0.8
Total	**207,662.4**	**100.0**	**150,189.9**	**100.0**

Source: Gartner (February 2013)

EU Smartphone Market Share

- Smartphone percentage penetration in Great Britain hit 61% in the latest period, 82% of all mobile phone sales over the past 12 weeks were smartphones (w/e 23rd December 2012)
- In Great Britain, smartphones made up 70.7% of sales over the 12 weeks (~Q4-11), meaning that 48.9% of the British population now own a smartphone

Smartphones now (Q3-11) make up 50% or more of all mobile phone sales in the US, Great Britain, Australia and Germany, with Italy, Spain and France expected to follow suit within the next quarter.

Source: Kantar Worldpanel ComTech

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