



The Squace UMI

**The market opportunity for a universal mobile
interface and a review of the Squace solution**

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EXECUTIVE SUMMARY

The adoption rate of mobile devices in all their forms as the main interface to web-based services and content has been phenomenal, with the launch of Apple's iPhone being the fastest ever adoption of new technology.

Ovum estimates that consumer mobile broadband users will grow from 152 million in 2008 to 1.9 billion in 2014 as consumers' use of the Internet dwarfs that of the enterprise. Likewise use of 3G mobile devices generally is set to exceed 3 billion over the same timescale.

However, the delivery of services and content is hindered by the wide variety of platforms and device manufacturers and the closed, proprietary nature of these ecosystems. Because applications and data may look or behave differently on different platforms the providers and distributors either have to tune them for each platform or make difficult decisions about which one to concentrate on.

There are different types of platforms. Some are closed and run by the manufacturer such as Apple's iPhone; some are based on an operating system such as Symbian; some are device specific; and some, such as Google's recent entry of Android, are being adopted by a wide variety of handset manufacturers. Content similarly comes in different forms: some through content portals that have generally been provided by mobile operators and some through app stores that may be device specific or more open.

From the user's perspective this introduces barriers to switching between devices and platforms with the potential loss of content and inconsistency of interface. From a mobile marketing provider, and the providers of applications and content more generally, this increases the cost of delivery and support, and reduces the potential return on investment.

The user community now has an insatiable desire for more and better applications and services that are easy to use and make the sharing of content and social interaction easy and consistent. Users require services that eliminate the barrier between what they could do on their desktop and what they do on their mobile device, and which let them move seamlessly between the two.

The jungle of options is a barrier that can only be eliminated through the widespread adoption of standards and a consistent portable interface. Squace has launched a universal mobile interface (UMI) that provides such a consistent well thought out interface that it has ported to the majority of mobile platforms and devices. The UMI has a number of major benefits for developers, operators, and users alike, of which the following are key:

- The interface is consistent on all mobile devices.
- Users can publish and share content with ease.
- There is one integration point for developers of applications and content distributors.
- A cloud-based server provides support that automates the publication of content and enables convergent device usability between mobile or desk-based Internet devices

Squace is adopting a wide approach to market penetration. It offers a downloadable client that has been installed over 600,000 times to date, and is building up a channels strategy amongst key identified markets including online communities, the retail and travel industries, and the suppliers of directory and contact services. They are also recruiting technology partners across a wide spectrum. Notable early successes are with the content management systems EPiServer and WordPress.

Squace has to date been built on modest venture funding and expects to break even in the second half of 2011.

Ovum believes that Squace's UMI provides an excellent opportunity to help business to business (B2B) organizations develop applications and offer content that is easy to distribute and easy for users to adopt and use. We also think that the general consumer community will greatly appreciate the ease of switching between devices and the elimination of barriers between desktop and mobile Internet usage.

INTRODUCTION

Intended readership

This paper has been written to explain the value and motivation for the development of the Squace UMI and is aimed at market watchers and the senior management of potential partnering organizations.

Approach to writing the paper

The paper is an extended form of Ovum's standard technology assessment that adds more information on the need and value of a UMI and reviews the market potential of Squace.

OVERVIEW OF THE MOBILE MARKET AND THE POTENTIAL VALUE OF A UNIVERSAL MOBILE INTERFACE

MOBILE DEVICES AND THE WEB

The main advantages of the mobile compared to the PC are that it is a much more personal device that the user carries with them and that it is always switched on. This makes the mobile extremely valuable to the end user and the mobile also thereby holds the potential to become the primary personal window to the Internet.

Until recently the take-up of smart phones was slow, as was the use of any Internet-enabled features of less capable mobiles but it is suddenly accelerating with a new wave of hardware and improved content and applications, as well as changes to pricing that have introduced flat data plan fees, resulting in lower costs of downloads/content consumption, all of which encourages users to use their phones for much more than just voice and SMS messaging. It's not just the iPhone introduction that has accelerated this game changing trend, although that certainly has played a part. There is a general increase in the popularity of mobile interaction with social/business networks such as Facebook, Twitter, MySpace, and LinkedIn, and a growth in the use of mobile search as more people become aware of the web capabilities available in their phones.

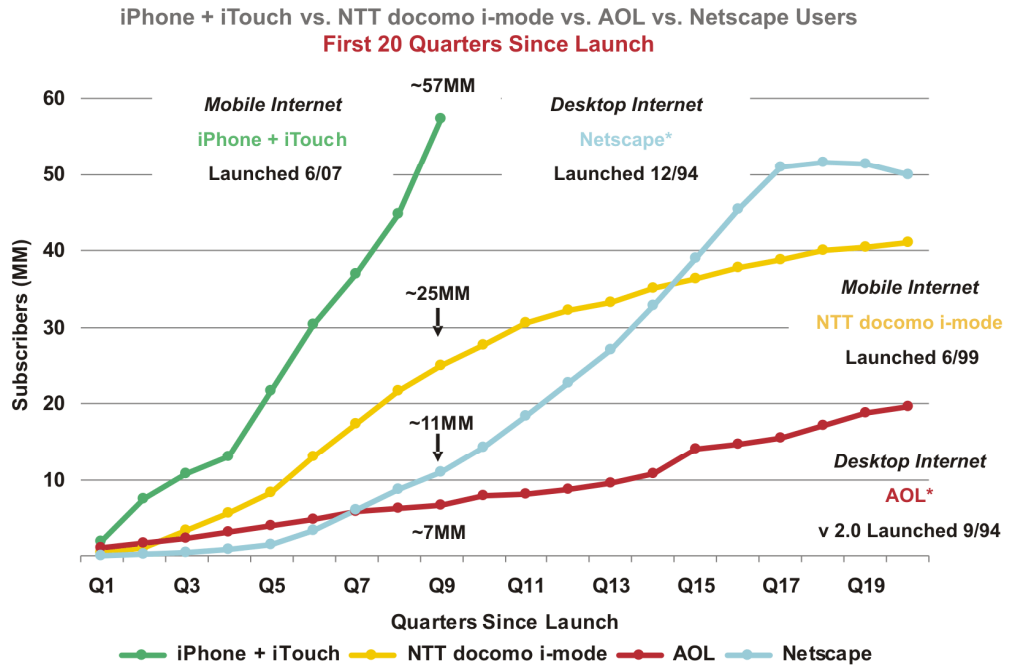
Industry forecasts

The use of mobile phones to access Internet content and applications has been growing rapidly over the last two or three years. Ovum's mobile broadband growth forecast, 2008–2014 states that "There will be almost 1.8 billion mobile broadband users accessing services via a handset in 2014."

Figure 1: Faster ramping of mobile Internet access

Mobile Internet Outpaces Desktop Internet Adoption

iPhone + iTouch Users = 8x AOL Users 9 Quarters After Launch



Morgan Stanley

Note: *AOL subscribers data not available before Q3:94; Netscape users limited to US only. Morgan Stanley Research estimates ~39MM netbooks have shipped in first eight quarters since launch (10/07). Source: Company Reports, Morgan Stanley Research.

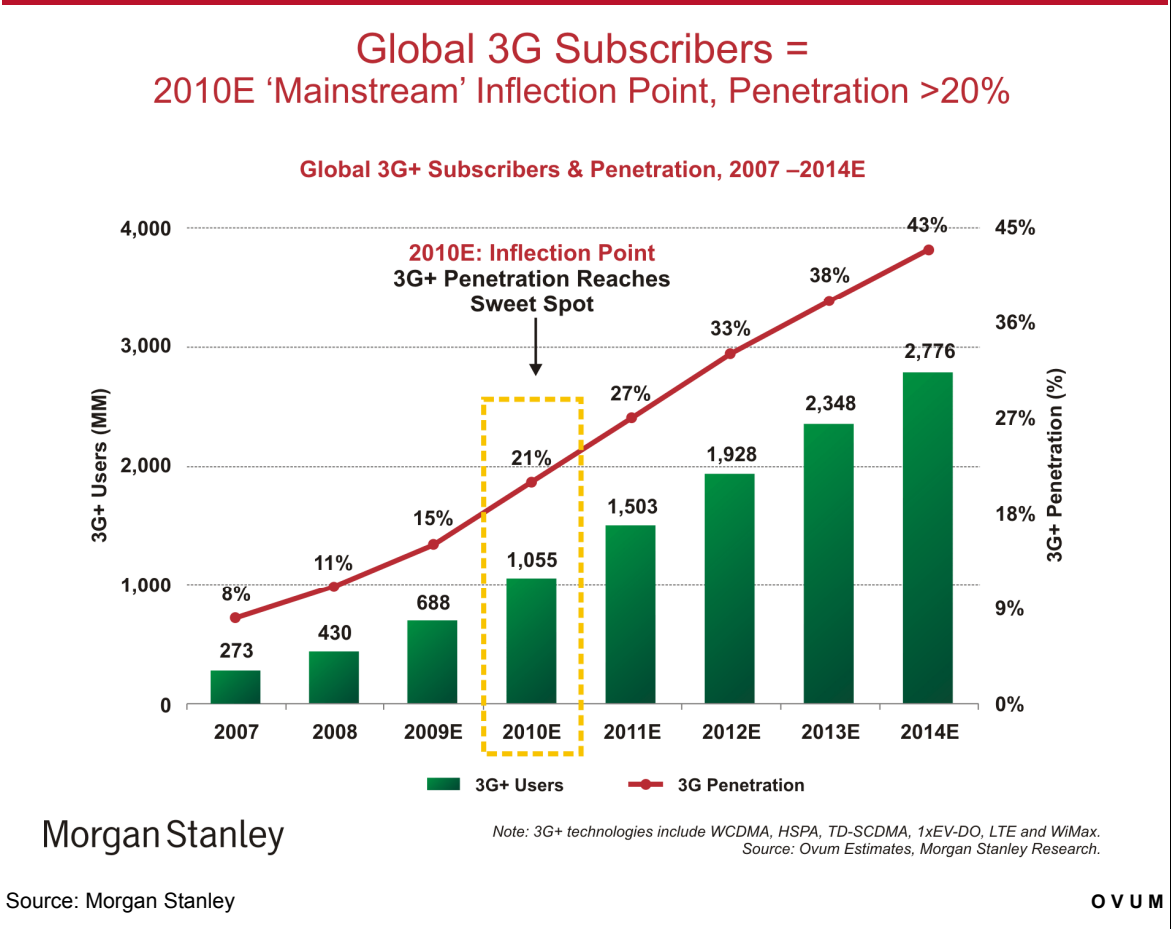
Source: Morgan Stanley

OVUM

The ramp-up of mobile Internet is significantly greater than it was initially for desk-based Internet access. As can be seen from Figure 1 above, the Morgan Stanley Mobile Internet Report released in December 2009 showed the comparison between Apple’s iPhone and iTouch and AOL’s V2.0 of its ‘walled online community’ software launch of the previous generation. It was notable that five months after release the Apple launch had generated eight times the subscription base of the earlier AOL launch.

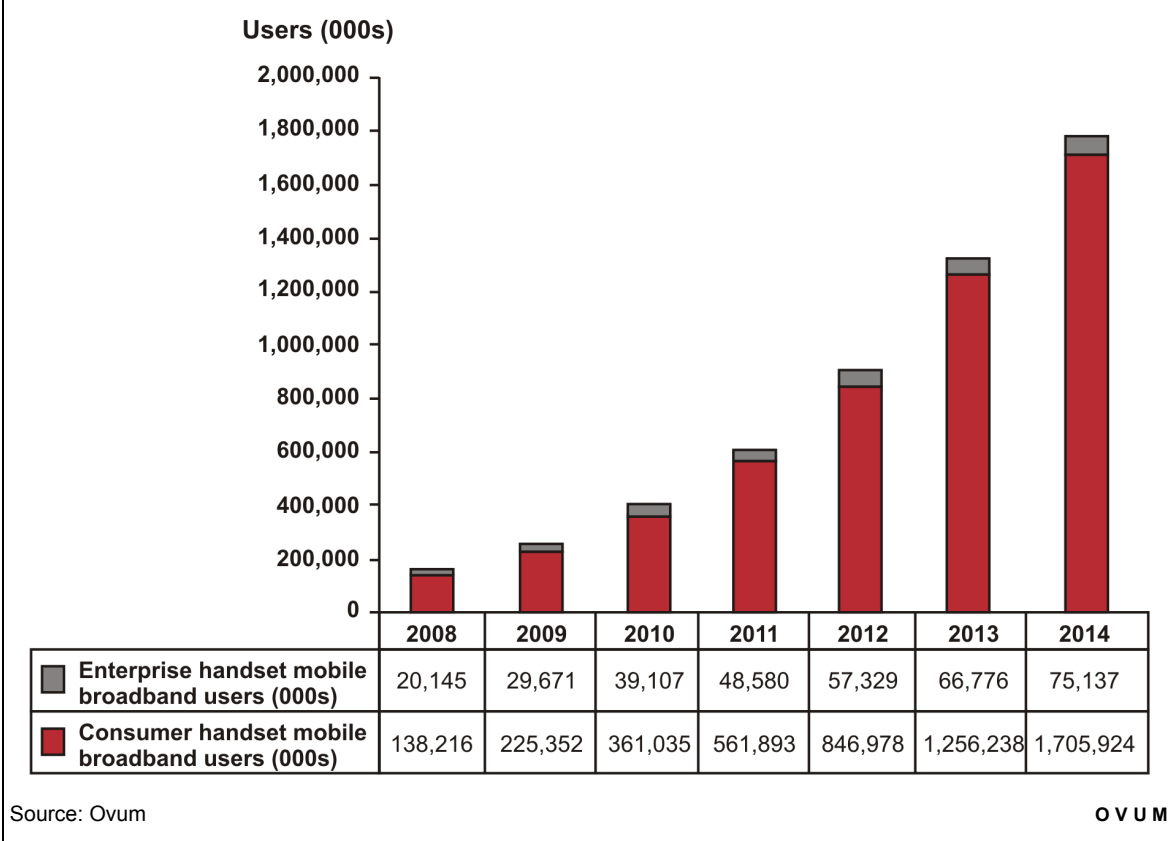
The same report shows that, based on Ovum’s estimates, the number of global 3G subscribers of Internetcapable devices will reach an inflection point in 2010 of over 20% penetration of mobile Internet access.

Figure 2: The rapid adoption of 3G enabled devices



The number of consumer mobile broadband users will grow from 152 million in 2008 to 1.9 billion in 2014, and will dwarf the enterprise market which is set to reach 135.5 million users globally in 2014. The uptake of mobile broadband on the handset remains very much the preserve of the consumer, as shown in Figure 3.

Figure 3: Enterprise versus consumer handset usage 2008 – 2014



Ovum’s comment on these forecasts

The evidence shows that the ramp-up of mobile Internet access is far faster than previous generations of Internet adoption. These forecasts also point to the increasingly critical issue for those selling services and content of capturing a major share of the consumer market.

Using mobile devices to extend the Web requires specialist design and an effective environment

Mobile applications have to be fast and easy to use, or adoption will fall off very quickly. So with mobile applications it is very important to take into account the constraints of the wireless devices, bandwidth restrictions, screen size, and connectivity issues. The applications and supporting infrastructure should be designed to ensure the usability of the devices by providing functionality that reduces the amount of data transferred to and from the device, and actively manages the device sessions. This can be achieved by ensuring that the information transmitted and held on the device is kept to a minimum by utilizing compression techniques and filtering the data to the lowest requirements, along with the provision of session management capabilities. The primary restriction is not, however, the bandwidth, but rather the small screen and the tiny key board, if any. The more that can be done in the cloud before being delivered and processed on the mobile itself the better the outcome of the user experience.

CONTENT AND APPLICATIONS DELIVERY

There are a wide variety of players in the mobile market. They offer an increasingly complex web of mechanisms supporting the supply of content and applications over the various hardware form factors available from multiple operators and hardware providers. We'll very briefly summarize the different technology groups and delivery models.

Delivery front ends

Mobile sites

As we said in the last section, delivering information and services to the Web requires a simpler, cleaner web site to be built, and most professional organizations have recognized the need to build appropriate mobile sites. Once indexed there are a range of web browsers to suit the various platforms that enable retrieval of content:

- Opera Mini – for the Java platform.
- Skyfire for Windows Mobile and Symbian
- Safari for the iPhone
- Google Chrome for the Android platform
- Microsoft IE for mobile for the windows mobile platform
- Firefox Mobile for Nokia Maemo and Windows Mobile 6.0 (alpha).

Those that develop sites for mobile use would be wise to check their applicability to the various platforms and devices by using a site such as mobiReady test – <http://ready.mobi> – that offers emulation of the different options and provides an evaluation that gives a rating of your site's suitability for mobile consumption.

Content portals

The mobile operators have traditionally made money from the download of content, and historically that content was rather limited. Areas such as ringtones, games, screensavers, and to a lesser extent mobile TV, are nothing like as rich as those available on the wider Internet. These operators have now improved their approach and are creating their own appstores. The issue for them is whether they can offer a compelling brand and enough differentiation to stand out. They also have a huge issue in that an operator appstore has to cover many phone brands and operating systems.

The app store

There were previously general app stores such as Get Jar, but there is little doubt that Apple has been the pioneer in developing the concept. By January 2010, Apple had over 3 billion downloads of its 100,000 platform-tuned applications from its online portal. Blackberry has a similar model (Blackberry Application Centre) for its RIM-based devices. This was an explosive growth area in 2009 and the list of vendors offering appstores is now extensive. These stores sell applications and content to their own close-knit communities of users.

Generally, developers of applications gain commission based on the sales managed by the appstore owner, although most apps at this time are still free to use. Freely distributed apps are advertiser funded or sponsored and are generally either utility or fun/entertainment genres of apps that lend themselves to brand sponsorship (e.g., Nike, Adidas, Reebok, and Coca-Cola).

Apple has also added support for 'in-app billing', which means developers can prompt users to purchase additional content or upgrades from within the application without having to return to the appstore. Developers can also now sell applications on a subscription basis. These features will be popular with developers as it gives them more flexibility in the way that they charge for their applications. If they are not implemented carefully, however, they could become a nuisance for users.

Technology platforms

Closed operating systems and managed device platforms

By tying the iPhone to iTunes exclusively for a wide range of its functions, including application and content downloads and software updates, Apple has fundamentally taken control of the users' environment. This effectively makes it a closed, if rich, ecosystem. Google, Yahoo, Microsoft, RIM, and Nokia are all evolving in this direction. Developers will need to work with each Managed Device Platform (MDP) vendor tailoring their applications to support each environment.

Open platforms

Open platform vendors such as Microsoft and Symbian impose no limitations on how the operator, device manufacturer, application developer, and end user exploit each device. From a developer's perspective this might involve tailoring an application to each specific device and means that applications that a user purchases for one mobile don't transfer readily to an alternative handset.

Google has developed an open operating system called Android which enables customers of any phone built on that platform to download applications from its Android Marketplace (appstore). This offers a degree of certainty that applications will run without change on any compatible handset. However, although this is the ambition it may not be fully achieved as different versions of Android are now appearing.

What is clear is that the Android platform is becoming increasingly popular. In fact, because there are Android phones from multiple manufacturers it was obvious that it would be only a matter of time before a combination of Android-based smartphones would outsell Apple's one and only iPhone.

The NPD Group, which conducts wireless market research, has stated that in the first three months of 2010 Google's open-source operating system, which includes phones like the Hero, Incredible, Nexus One, and the Flip, accounted for 28% of all US smart phone sales. RIM's BlackBerry remained in first place at 36%, and Apple's OS fell to third at 21%.

Collaboratively developed web-based widgets that enhance phone functionality

Generally device manufacturers and operators recognize the need for portability and transparency of usage of applications and content and are increasingly working together to avoid problems.

For example the Joint Innovations Lab (JIL) is a joint venture involving China Mobile, SOFTBANK, Verizon Wireless and Vodafone established in 2008 to promote the development of new mobile technologies, applications and services. Its focus has been to create a single global platform for developers to encourage the creation of a wide range of innovative and useful mobile widgets. These mobile widgets will be capable of enhancing the mobile Internet experience for customers on a variety of smart phones as well as mid- and low-cost handsets across several operating systems and distributed through JIL operators' applications stores. To make use of JIL widgets the manufacturers of the phones must make them compliant. A JIL widget is a small, web-based application that gives customers access to useful services such as weather guides, stock lists and flight trackers and entertainment services such as games and music.

Ovum's comment

This is a jungle. Whether you are a developer, operator, content provider or mobile user, the options are complex and there is a painful inability to switch ecosystems once you are committed to any particular path. Developers need to port their applications to multiple ecosystems if they are to access the whole market. The mobile Internet experience for users varies significantly between these ecosystems and doesn't naturally extend their desktop experience. This discourages users from migrating from one ecosystem to another or using devices from multiple ecosystems. Despite the emergence of more open solutions there is still the need for those delivering applications and content to make difficult strategic decisions about the platforms that they choose to adopt.

Generally we would say that the best way to minimize these issues is to adopt interfaces built on World Wide Web Consortium (W3C) standards, and with the introduction of HTML 5 due out at the end of 2010 some hitherto proprietary features will be included within the HTML language. For example offline storage and scripting will enable the standards based development of Internet services run in a mobile browser and reduce the need for plug-in-based rich Internet application (RIA) technologies such as Adobe Flash, Microsoft Silverlight, and Sun JavaFX.

WHAT THE USER COMMUNITY ACTUALLY WANTS

The uptake of mobile 3G applications has been truly phenomenal. The users' appetite for new content, applications and capabilities shows little sign of waning. So we must assume that users and particularly the consumer market will want more of everything. But we do know that the form factor is different from that of the desktop and the nature of location independence also makes a difference to what's required. Here are a few obvious requirements.

Ease of use

Too many mobile-based applications require a high degree of user dexterity. For example, the need to type in URLs and requiring multiple clicks to navigate through to the required content. The users want to eliminate the need to type and click as much as possible. In short, the users want a less complicated mobile experience which is easy to operate, with the ability to organize bookmarks, services and applications.

Sharing

Making it easy to share content to friends and services (regardless of their context) reflects current consumer demand trends as evidenced by the rapid growth in social networks. Users want the ability to publish and share links to useful content and applications that they have discovered on the Web and to receive suggestions based on their preferences, usage, and goals. They need to be able to move information between individuals and groups of users on social networking sites and their private environments with ease.

Universal contact book for both individuals and social groups

Users want access to their contacts through social media, email and instant messaging, and any other form without the need to worry about synchronization or transfer of contact books.

Personalization

Users will accept some degree of advertizing if it is by way of payment for their access to an enhanced service, but generally users want complete control over what is delivered to them and over how it is laid out. The limited screen size makes every pixel count when presenting material and navigation options to the users, and unnecessary clutter is something that they wish to eliminate. Defining how they want their mobile to behave must be a very straightforward and intuitive process.

Independence

Transparency on change of mobile device is something users are not currently likely to get if they move from one platform to another and in many cases this applies to moving from one handset to another, even if provided by the same manufacturer. Moving applications often requires a reload of appropriate versions of the software which is a considerable headache for users. We must make it easy to access (or easy to restore) the user's personal information from any device, including the Web.

Support for micropayments

The mobile device has the potential to be one component of secure, encrypted means of identity for the user, and also offers a micropayment opportunity where it could be used to authorize payments on the move for all manner of things such as travel or a cup of coffee. A micropayment capability has long been seen as a major benefit and a potential killer application for the mobile.

Better handling of voice communications

The convergence of voice and Internet means that we have a radical opportunity to enhance the way we communicate through speech. We should be able to convert voice into messages and messages into voice. Visual voicemail should allow us to retrieve our messages from clickable links, and in turn this should make it easy to share voice messages and to manage their distribution more effectively.

Location-based 'presence' applications

Location plays a natural role in the mobile context: primarily for the user to get more accurate information such as 'where am I?', and also for services that can suggest information or offers based on that location.

Location-based applications and services are already looming as the next big thing in mobile applications. They are valuable to both sides of the coin. The application suppliers can gain revenue from promoting services based on the user's location. The user gets appropriate localized support and service access. For wide scale adoption the services should be accessible on a large number of devices.

There have over the years been a lot of failures within this area. However, the timing is now much better as cost-efficient assisted global positioning satellite (A-GPS) infrastructure and devices are in place in combination with good Internet/cloud applications.

The content they get on the desktop

The user community wants access to web-based information and to services that are designed for web access without the overhead of large downloads of unnecessary window dressing. The mobile Web needs to be a lean, well-structured environment where the user can define bookmarks to sites that deliver content and services effectively.

Ovum's comment

The demand is clearly in the market and the technology is available. What's required to fulfill the users' aspirations is clarity of vision and excellence in exploitation of the opportunities, and the rewards are huge.

THE NEED FOR A UNIVERSAL MOBILE INTERFACE

If the mobile device is set to become the primary personal window into the Internet then all the issues regarding delivery of content and transparent availability of applications, and the ability to switch devices, suppliers, and operators becomes critical.

It is quite possible that user communities will be happy enough to exist in a world that's owned by a supplier that they trust, but in the end this limitation on freedom of choice is likely to slow down the widespread deployment of new and innovative features and content as developers struggle to keep up with all the varying platform requirements.

The user community is rapidly getting to grips with the concept of cloud/server-based computing and the fact that they do not need to retain content locally if they are always connected to the Internet at realistic bandwidth.

The idea that they could have one common interface that was under their control and available on any device they chose, regardless of the operator, platform, or hardware manufacturer becomes very attractive indeed – that is, as long as that interface supported the sort of rich environment that the current ecosystems can support.

For those involved in the development and distribution of content, the degree of uniformity and the ease of deployment are obviously critical. Over the next few years we expect to see a major increase in the way users are targeted by mobile marketing, suggesting appropriate offers to them based on their profile and their location. A universal mobile interface would be very advantageous to those supporting that need.

TECHNOLOGY ASSESSMENT OF THE SQUACE UMI

ABSTRACT

Squace has developed and patented a universal mobile interface (UMI) that makes it possible to access the whole Internet and related services effectively from any mobile phone, eliminating many of the problems caused by proprietary platforms and closed communities. The interface efficiently utilizes the small mobile screen, making it very suitable for low-end phones, as well as more advanced ones. It uses a very thin client downloaded once from the Web and is completely independent of the operator, the operating system, or the device manufacturer, providing a consistent interface on all devices.

The Squace UMI is serviced by a server-based environment that orchestrates access to applications and content from the Internet. The interface is highly customizable by users so that they can tune it to their own liking to show applications and content that they find of most value. This makes Squace universal as a service, while remaining a very personal service from a user perspective

The Squace environment provides the user with an easy way to organize bookmarks and contacts from different sources with a single click. Bookmarks can be added to a mobile from the user's desktop computer as well as from their mobile device. Squace has also allowed bookmarks to be bundled together so that they can be passed to others as a group or easily removed. Squace also offers a very easy and efficient way to publish existing Internet content or to publish new mobile content from the desktop.

The Squace interface is clearly designed with the purpose of reducing the number of clicks to get to the user's preferred service, contact, or bookmark. The innovative grid system makes it possible to handle more links or contacts without the user losing control. The user can easily switch to a list view and also to an icon view when necessary. The start page, called My Stuff, serves as the user hub and is probably the place where the user has his or her most important bookmarks, services, and groups of contacts. An interesting feature is the ability to create shortcuts, wherever the user is, by just adding the link to the start page (My Stuff) or to any other bundle of links. Another driving force within the Squace interface is the emphasis on sharing functionality. The user can share content, bookmarks, or bundles of bookmarks with one or more contacts regardless of their access method (SMS, email, or within services like Facebook).

The second key element of Squace is the universal contact book where the user can upload their phonebook to their Squace account. We do note however that this function may be somewhat device sensitive, and some low-end phones are not capable of this operation. The contact book will now turn into an online contact book with relationships to other services such as mail and Facebook. One integrated feature in the contact book is that every foreign phone number may have a local number provided by Rebtel for low costly international calls – of course the user then has to sign up for Rebtel. The universal contact book not only makes the sharing much easier, it's also an important cloud-based backup for the user. Users of Squace are free to switch operators or devices without losing any personal information or settings. When changing phones the user just pushes Squace to the new phone and they will then retrieve everything (links, contacts, etc.) and be ready to go as soon as they are logged in.

KEY FINDINGS

Strengths:	<ul style="list-style-type: none"> ✓ Available on virtually all mobile platforms. ✓ Users can publish and share mobile content with ease. ✓ One integration point for a content provider reduces complexity for those publishing. ✓ Interface is customizable by users. ✓ Users are free to switch devices without loss of personal content. ✓ Porting of web services is straightforward and makes content available on all platforms.
Weaknesses:	<ul style="list-style-type: none"> ✗ Currently limited applications support.

LOOK AHEAD

The current Squace offering embeds the learning experience of over 600,000 downloads of the initial versions since July 2008. The latest beta release has the goal of providing the user with a better user experience. Squace has clearly shown that it listens to its users as the growth rate of new accounts is currently about 3,000-5,000 a week.

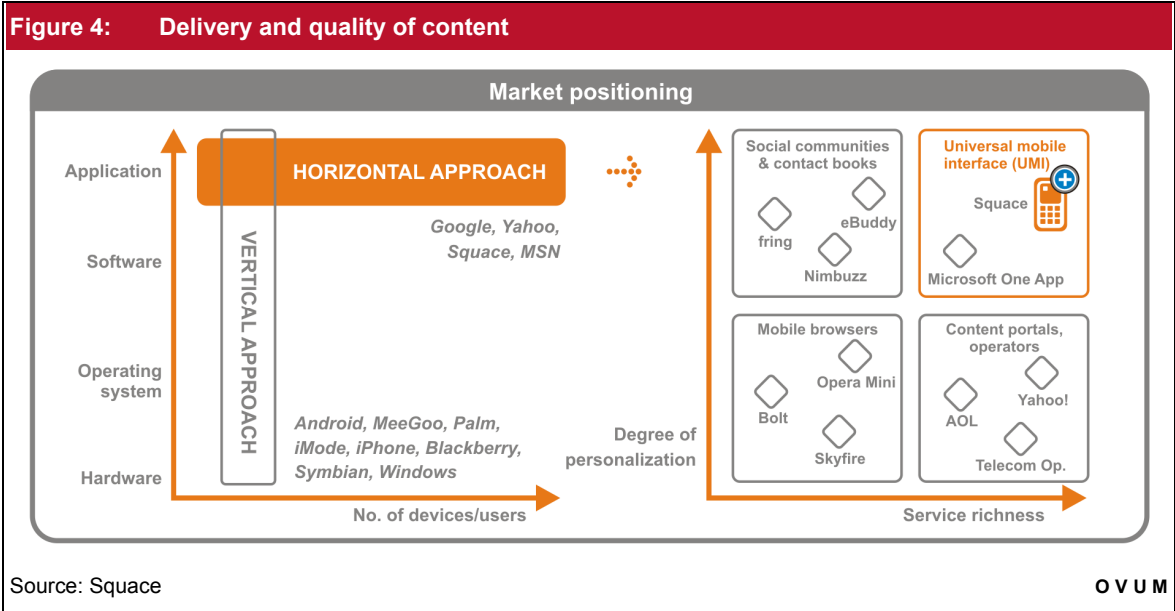
Squace will move from beta into a full release within 2010 and will launch its product into the wider market outside Sweden. It will also be establishing an application development community. The support services and servers will be ramped up so that Squace is robust and scalable to meet the expected rapid growth of usage.

FUNCTIONALITY

Ovum's research shows that the mobile is clearly set to be the dominant mechanism by which the user community will access the Internet and so the competition to support this rapidly expanding market is intense. But the current options on hardware, operational platforms, and the delivery of applications, services, and content are complex and confused and there is a great need for simplification and consolidation.

There are a number of ecosystems that provide the infrastructure and operational capacity to deliver applications and content to this user community. There are horizontal approaches such as those managed by content providers, open platforms, and collaborative initiatives such as Google, Yahoo and the Joint Innovations Lab, and there are vertical ecosystems such as the managed device platforms of Apple's iPhone, Nokia/Ovi, and RIM's Blackberry, as well as appstores aimed at niche markets. Figure four below shows the Squace market positioning as offering a rich service level and a wide range of potential vertical applications on multiple platforms.

Squace’s first goal is aimed at its business to business (B2B) market. Squace will offer a distribution model aimed at sectors that can immediately see a strong return on investment (ROI) by going mobile easily via Squace. For them the choice of ecosystem will be irrelevant because Squace has provided a consistent UMI which offers the same look and feel regardless of the platform. This horizontal approach allows users to move between ecosystems without loss of control or content.



Squace’s second aim is targeted at the user community and has two main components:

- Make this interface highly customizable so that the user is free to choose the content that they wish to see.
- Provide a rich set of applications and services that are extremely easy to use and that make the sharing of information straightforward.

The design objectives for the Squace UMI resulting from these aims can be summarized as follows:

- Provide an interface that’s optimized for an effective small-screen interface with limited keyboard capabilities and make this available on the widest possible set of platforms.
- Make the screen navigation extremely efficient and provide the ability to access, share, and publish content using actions that require minimal clicks and no typing.
- Provide an easy tool for adding bookmarks and contacts to your mobile from desk based devices, i.e., bookmarklet tool.
- Include automated search-engine indexing of Squace bookmarks.
- Provide content management systems integration tools, such as plug-ins and rapid creation of mobile extensions to existing online web services/sites.
- Give the user complete control over the content and applications they wish to use.
- Provide social networking and collaboration tools that do not require the use of expensive SMS and are available anytime, anywhere.
- Provide all the supporting infrastructure and services using a cloud-based approach that merges its capabilities with services and content from the wider Internet.

Squace’s third aim is to make the adoption of their UMI extraordinarily easy so that its use spreads virally because it offers the user community an excellent social networking experience and encourages the sharing of links and content.

Product analysis

Squace consists of three main components:

The Squace content server: This manages all the business logic. It serves as a proxy between mobile clients and the Internet and manages bookmarks and tags, messaging and sharing, and search and content discovery as well as presentation of that content.

This content management system (CMS) also delivers bespoke content delivery per channel, distribution point, territory, or branded partner thus allowing tailored content packaging relevant to the download source (web site, network, appstore, country/region/language). Squace’s open API will also allow for other service ‘plug-ins’ such as multiple ad servers/ad networks, and other technology service providers and enablers such as voice activation, mobile payment, coupon and voucher delivery and redemption, augmented reality, location specialists, near field communication (NFC), and rich media delivery.

The Squace mobile client: This is the interface application that users download from the Web and run on their mobile devices. This client interface can be downloaded from the Squace main web site or from partners’ web sites and those providing links to content that is tagged on Squace’s content server.

The Squace web client (www.squace.com): This is the web interface for users and content providers that they would use in the office or on mobile laptops for the management of bookmarks and easy client configuration and for the download and publishing of content.

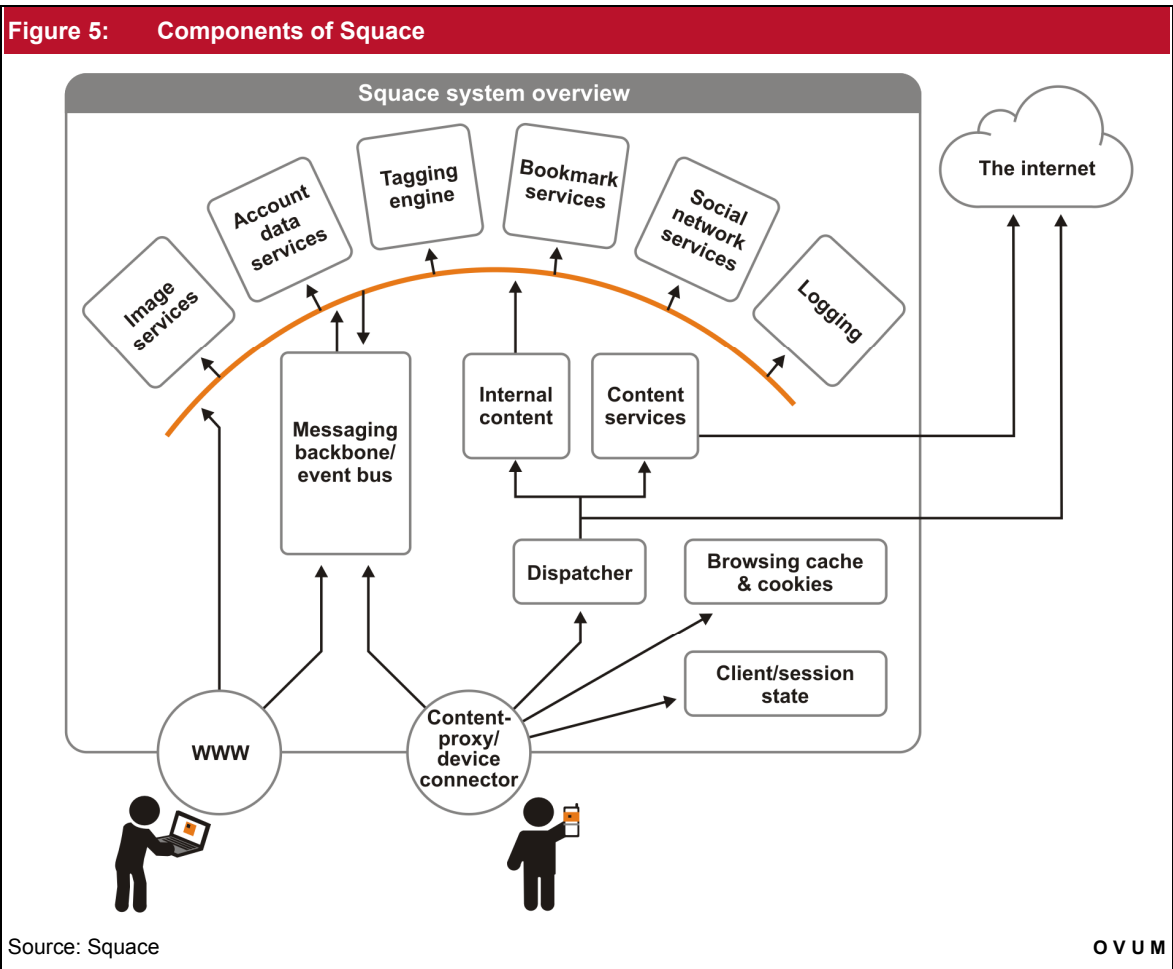
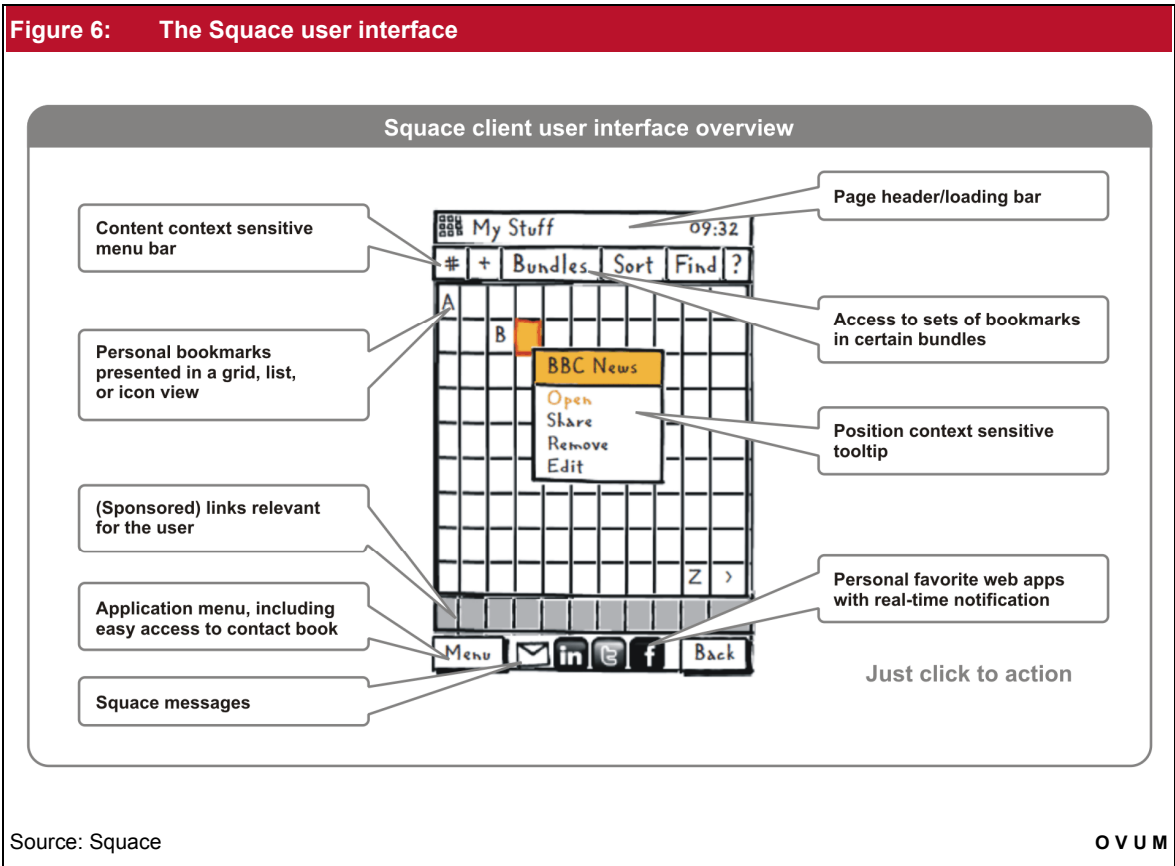


Figure 5 shows how the Squace server sits between the content providers and in this case a Java-based mobile phone, managing and tagging links to mobile content and serving that content to users. Within this framework the user will be offered an optimal navigation path that is tuned towards their personal settings and previous personal behavior.

Product operation

Figure 6 below shows the standard layout of the Squace mobile client. The top line provides page heading and loading information. The second line offers a context-sensitive menu for choice of services and the management of bundles of bookmarks (see bookmarks and bundles in the section below).



The third line down is an area where each small box relates to a link within the Squace server that the user has established to link it to web-based content and services. These links appear in a grid pattern and organized in alphabetical order, easily rearranged by the user by toggling the view from grid to list to small icons. The user can set these up either on the Squace web client by simply asking that the link be added to Squace or by just clicking 'add to my stuff' for content found in the mobile browser. This doesn't involve any typing of URLs although the user is free to provide their own name for the link. These links can also be sent to the user's contacts either from the web interface or from the mobile device. When a link arrives at a mobile device it appears in the inbox, or if they are not yet Squace users it would be sent to their email and/or mobile with the opportunity to download the Squace mobile client. When a user finds content on the Web that he or she wants to add to Squace or send to friends they are also able to tag it and define whether they wish to make it a private link or would like it to be generally available. If they want it to be made available to all then the link is not only held in the web server but it is also indexed for search engines like Google.

Bookmarks and bundles

The means to add bookmarks on the fly is provided using a 'bookmarklet tool' where the user can add a bookmark with a simple click from a page displaying on their browser. This is very similar to existing services such as Delicious and X-marks with a slight difference: the user can easily choose to place the bookmark in a bundle to add it to a group as well as tagging the bookmark. The reason for this is that mobile bookmarking is more likely to handle a larger volume of bookmarks that are used just once; e.g., an address, today's menu at a restaurant, etc. The bundle supports the concept of having one or more scrapbooks for use on the fly. The bookmarklet tool is available for all major browsers and will probably soon have extended functionality for bookmarking text, photos, and videos as well as bookmarking contacts directly to the contact book. Table 1 summarizes the bundling concept.

Table 1: Bundles	
<p>Bookmarks, bundles & tags are designed to make retrieval of information simple.</p> <p>You can assign one or more tags to a bookmark/link.</p> <ul style="list-style-type: none"> • A tag helps describe an item and allows it to be found again when browsing or searching. • Tags are generally chosen informally and personally by the item's creator or by its viewer. <p>You can also assign a bookmark/link to one or more bundles.</p> <ul style="list-style-type: none"> • A bundle can contain anything from zero to many bookmarks. <p>Bookmarked items are retrieved as follows:</p> <p>Most important stuff is placed on page one. It's a mix of:</p> <ul style="list-style-type: none"> • those assigned to the 'top' Bundle • those most frequently used • and those most recently used. <p>Selection is also by bundle name.</p> <ul style="list-style-type: none"> • All or part of a word in the 'find field' which matches the title, bundle names, and/or text. <p>Squace users can share both bundles and particular bookmarks with friends.</p> <p>Bundles can be shared by users with one user assigned as administrator to define the distribution.</p>	
Source: Squace	OVUM

When users connect to friends they can also state whether they wish the friends to be able to see their public bundles of bookmarks. This easy ability to define, share and send links is all part of the viral marketing philosophy that underlies the Squace concept. The fact that a user has the choice of publishing content from the mobile device 'on the fly' or by defining the links on the web client to publish via Google shows the flexibility built into Squace.

The line above the menu line at the bottom defines 'sponsored links'. Depending upon the user's profile of tags in the links that they have chosen it will be possible to present them with 'suggested' sites and links that are appropriate and contextual to that user. This is one of the revenue-generating mechanisms associated with Squace. Clearly this could also be influenced by the proximity to locations that would wish to make appropriate marketing offers to the user. A further revenue-generating opportunity would be to offer a 'premium service' to users that does not offer up advertising links.

The bottom-line menu offers access to the contacts book where clients may initiate voice calls or instant messaging. Interestingly, Squace provides a contact book that is held on its server for each client and consolidates contact details from multiple locations. It has a directory that includes standard voice calls to mobile networks plus low-cost calls to Rebtel users as well as its own instant messaging and links to Facebook, Google Mail, Yahoo, and Hotmail. Ultimately this contact book will be truly universal and enable easy upload and download to Microsoft Outlook as well as other social networking mechanisms. One nice feature is the ease by which a single message can be sent to a mixed list of recipients using different communication channels.

The bottom-line menu also includes applications and web services chosen by the user, although a suggested set is initially provided by Squace.

Squace will be offering a multilayered search capability as one of these menu options.

- Find: a search through the user's own stuff.
- Discover: allows a search through the publicly defined content in the Squace server.
- Search: takes the search out into the wider Internet using Google Search.

Product emphasis

The product emphasis is on universal portability of both the interface and content in an environment that is straightforward to use. The ease of sharing content and the links into social networking are all geared to enhance the viral adoption model. Real-time response and very efficient download is also vital in this mobile market.

One to many grouping of contacts

The fact that a contact can be a member of multiple groups makes it possible to send bundles of content to multiple contacts at a variety of destinations with minimal clicks. Table 2 summarizes this concept.

Table 2: Contact groups

Contacts and groups made for easier sharing and retrieval.

You can assign a group to one or more contacts by tagging group members.

You can also assign an individual contact to multiple groups.

- A group can contain anything from zero to many contacts.
- Groups are generally chosen informally and personally by the item's creator or by its viewer, depending on the system.

Contacts are retrieved as follows:

Most important contacts are on page one. This is a mix of:

- those assigned to the 'top' group
- those most frequently used
- and those most recently used.

Selection is also by group

- All or part of a word in the 'find field' which matches the contact name and/or group.

Users can share and/or send messages to a contact or groups of contacts, or less specifically to Facebook and/or Twitter.

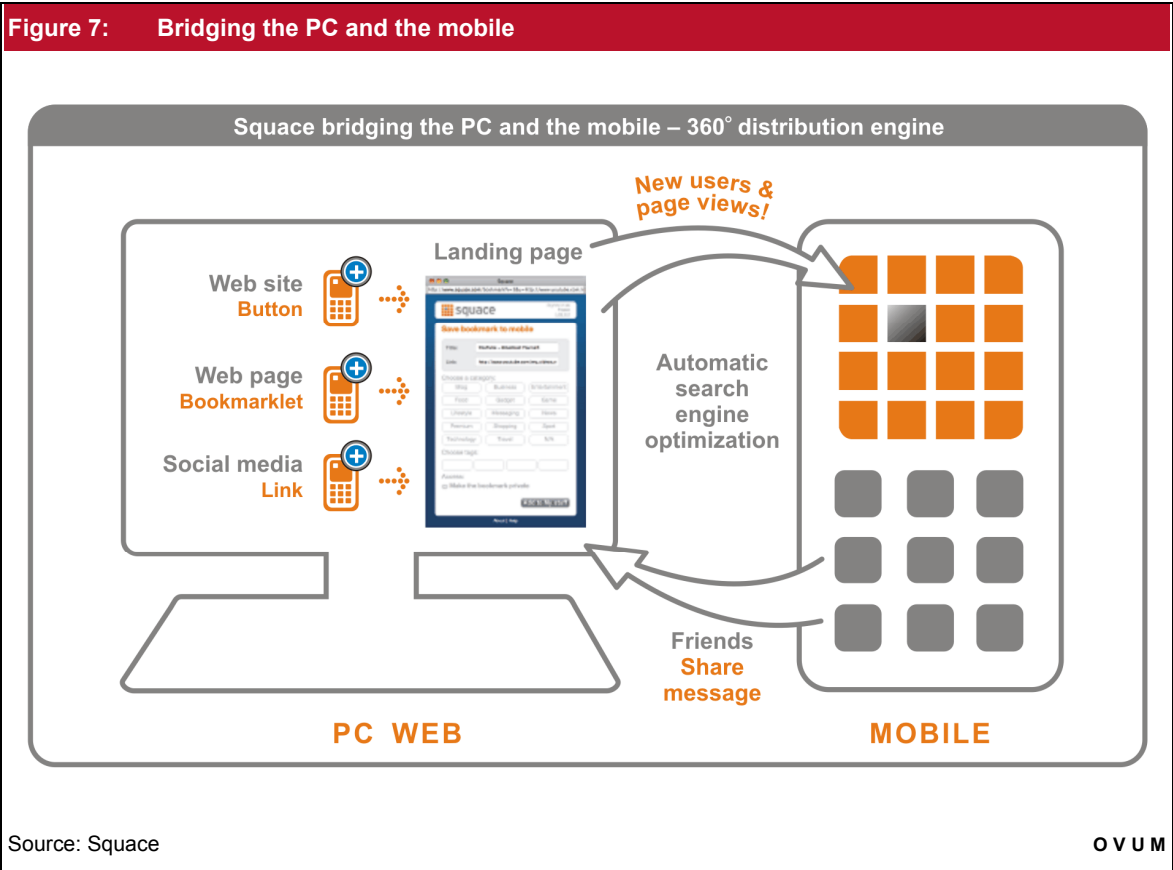
- If the receiver is a Squace user, the message will be sent to the Squace inbox, otherwise it will go automatically to the email address of the receiver or, if they opt in, via SMS.

Source: Squace

OVUM

Bridging the PC and the mobile

Squace is all about making the mobile experience easy and consistent. It also tries to make sure that moving from a rich desk-based environment to the challenge of the mobile device has as few drawbacks as possible. The use of single click buttons and the bookmarklet on web site pages to establish links that are immediately available from the mobile device and are automatically indexed for mobile search engine use merges the mobile and desktop experience.



The Squace 360° distribution engine (patent pending) shown in figure seven above offers something new for content and service providers compared to alternative solutions. Its simple click mechanism triggered from all kinds of entry points on the Internet will enable easy content distribution that will generate more demand. So far, mobile web sites have been struggling to achieve this.

DEPLOYMENT

The Squace mobile client is launching on the following platforms: iPhone, Android, Blackberry, Windows Mobile, Symbian and Java.

The main value of Squace for any Internet service is the ease of distribution. Any link can, with a minimum of effort, be added to the Squace community by just installing the landing page script.

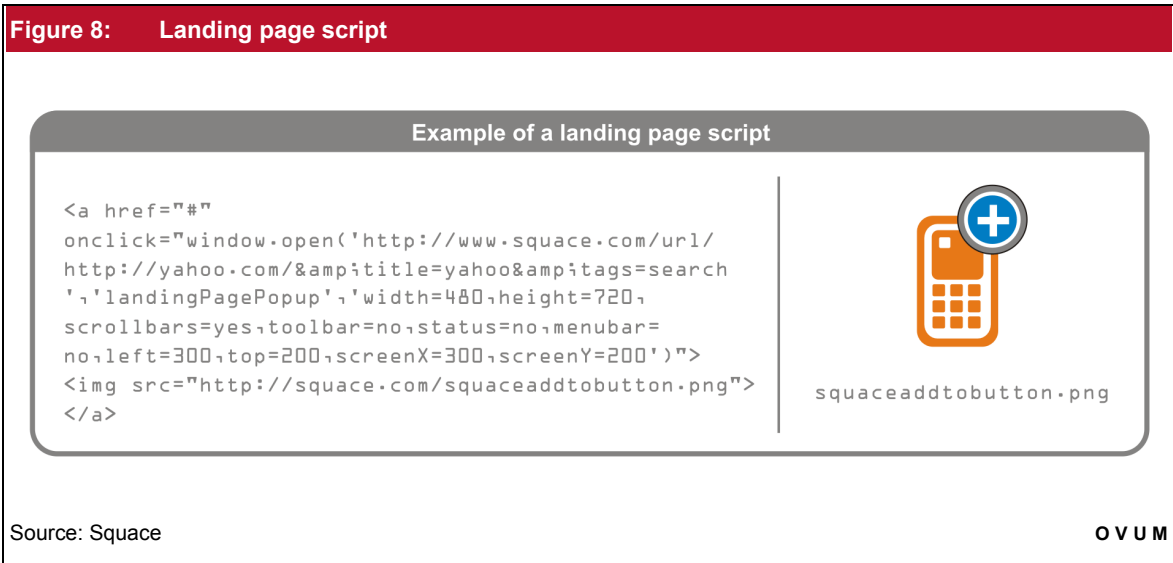


Figure 8 shows the example script for adding a link to the Squace mobile client onto a web page.

Squace already provides the development community with an API based on standard XML and useful emulators for testing links or services: www.squace.com/developer. Squace tells us that they will have an extended API and the software development kit (SDK) ready for the market by the end of 2010.

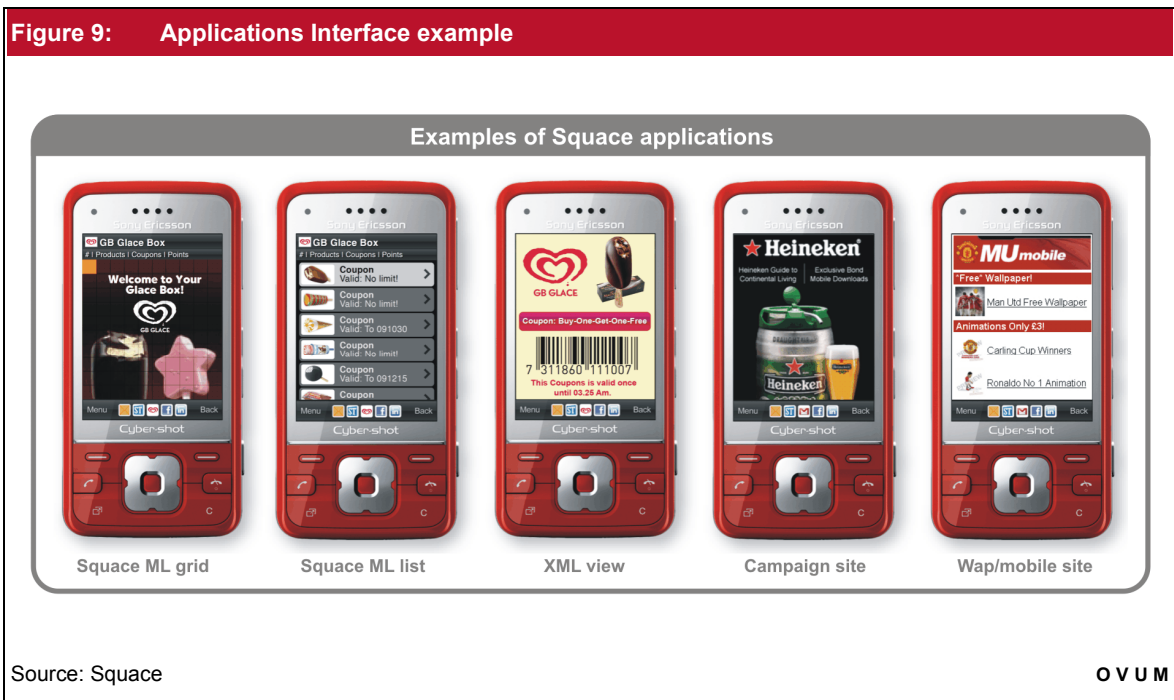
Squace offers content providers additional capabilities for handling their services and functionality. An overall implementation schedule might look like that as defined in Table 3 below.

Choosing Squace as the mobile platform will not lock the content provider into Squace: on the contrary, Squace mobile internet services will follow the W3C standards and so content created for Squace will be suitable for almost every mobile browser.

Table 3 below shows implementation skills and effort for typical deployments.

Table 3: Deployment of CMS-driven content			
Typical deployment scenario	Average implementation time (days)	No. of internal and external resources (FTEs) required	Skills required
<i>Mobile Internet site (follow W3C standards – level 4 or 5 at mobiready.com)</i>	< 1 day	1 person	HTML, cascading style sheets (CSS), knowledge in chosen CMS
<i>Mobile Internet site (follow W3C standards – level 1-3 at mobiready.com)</i>	1-5 days	Same as above	Same as above
CMS – WordPress	< 1 day	Same as above	WordPress
Other CMS	1-5 days	1+1 person	HTML, CSS, knowledge in chosen CMS, Squace ML knowledge
The estimates are only an indication of how quickly a Squace setup can be made and are subject to the web applications already being in place and the technical complexity. After this setup all kinds of mobile-specific services can be added incrementally when needed and/or applicable.			
Source: Squace			OVUM

Figure 9 shows a typical application interface. The important point to note is that once a developer has ported to the Squace client then this application will be available without amendment on all the platforms supported by Squace. The developer's job is made much simpler as a result.



PRODUCT STRATEGY

In order to become the interface of choice on the most highly functional platforms Squace has developed a 'whole product' optimal user experience for the mobile platform.

It would have been easier to penetrate the market on less functionally capable phones but that would not have led to widespread adoption. Delivering that 'whole product' requires more work on the support and deployment infrastructure and continued work on delivering the best possible performance and user experience.

On the user side this means providing pro-active usage support and optimizing the paths to content as well as offering various reminders and alerts and status information on users' contacts. It is also very important that the contact book is truly universal. Users will increasingly be charged for their access to premium content and services and so usage analytics and payment mechanisms will also be important.

On the server side there is a need to monitor content quality and to monitor and manage user analytics and to ensure that there is good support and communication back to the Squace user. Delivering and enhancing the API and SDK for content and application providers is also clearly critical.

The product release strategy is straightforward due to the fact that Squace is a server-based service. New server functionality will be released on a daily, basis. New Client functionality will be released approx every six months (mandatory update). New platform releases and/or API functionality will be released within the test community first and after four to eight weeks as part of the general product offer.

COMPANY PROFILE

Squace is a private company founded September 2006 and based in Stockholm Sweden. Initial funding of over €2.5 million was raised from 44 private investors in Sweden, the UK, and the US.

Squace has a US patent pending on its content mapping technology and the first release of beta software was in May 2008. The current release is v0.5 beta, delivered in June 2009 when the company undertook a 'soft launch' of its solution, mainly in Scandinavia.

Squace has just signed further funding of €1.2 million that will help it undertake a full launch during 2010.

The company is shifting from a design-driven technical culture into a global marketing-driven business operation and it is growing rapidly from its current base of 60,000+ users who have downloaded the Squace client.

The Squace client is freeware and content access is not yet charged for in any way.

Squace is now embarking on a channel and partner development programme that aims to integrate best-of-breed international technology enablers during 2010 from the following key sectors:

- scalable and secure mobile commerce/transaction capabilities globally and regionally
- CMS system providers
- international ad networks/ad server integration with comprehensive reporting and measurement
- enterprise scale SMS/Unstructured Supplementary Service Data (USSD) delivery via international aggregator partners
- mobile coupon, voucher/pin code issue and redemption with mCRM capability
- mobile augmented reality functionality
- voice activation and recognition application integration
- rich media compression/streaming partners
- measurable barcode scanning
- NFC capabilities for commerce/ticketing and security
- multi-language content/usability and application delivery.

Q2/3 2010 has seen extensive market engagement globally with leading vendors and enablers from the above mobile technology sectors. Squace intends to announce a range of significant partnership and channel agreements in Q4 2010 with at least 20 leading Internet and/or mobile organizations. Today they already have plug-ins for platforms of two notable vendors:

- EPiServer – providers of a leading CMS system with several million users for whom Squace offers a plug-in “web to go” component creating mobile bookmarks on every page view.
- WordPress – also a CMS vendor with several million users. Squace is also providing a plug-in “web to go” component creating mobile bookmarks on every page view.

Squace has partners (both national and international) in all its targeted segments.

SUMMARY OVUM ASSESSMENT

Squace is a bold initiative with a great deal in its favor. On one hand it is particularly valuable to the end-user community whom Ovum sees as driving this mobile market into the future. The ability to retain content and personal information and preferences whilst being entirely independent of the platform providers and operators is perhaps unique and will not be lost on the more savvy users. For those with less functional mobile phones Squace provides a welcome step up in ease of use and web access generally. On the other hand, for marketers and those distributing applications and content, the simplification and consistency delivered by Squace will be extremely important. This is particularly true of its 360° distribution mechanism supporting a multitude of device types accessing the Internet. Squace offers a very low threshold to launch business services onto the mobile channel that will lead into more traffic and a more personal and relevant relationship with its audience regardless of which device they own.

Squace is one of those propositions that deserve to do well even in a crowded market, and perhaps because of it. Provided Squace gets continued funding from significant partners to expand and support then the solution should prove very popular and potentially disruptive.

GO TO MARKET ANALYSIS AND ASSESSMENT

SQUACE GO TO MARKET STRATEGY

Routes to market

Squace is coming to the market in multiple ways as it seeks to get Squace 'across the chasm' and into what Geoffrey Moore described as 'the bowling alley' of opportunity.

The key to that opportunity lies in the requirement of the user community to find a simple, consistent, and effective way to download the content it requires with the minimum of fuss. Once hooked on the ease and universal nature of Squace it should be much easier for Squace to offer additional services and opportunities.

International users. Squace's beta program for the user community will be promoted directly and through various content distribution providers and partners who will also encourage downloads of the Squace client.

Online communities. These communities, such as school sites, business groups, interest groups, or social networks, have a shared need for close communication and co-operation and encourage a high rate of adoption. The financial model has to date been a consultancy, setup fee-based solution and a recurring revenue share model based on advertising and transactional values.

Retail. Squace can provide a low-cost marketing capacity that delivers coupons/vouchers and an easier, richer shopping experience. Squace promotes and facilitates loyalty, increased basket value, and augmented cross-sell and up-sell opportunities available to a larger consumer population. The business case includes the benefits of reducing the current mode of expensive SMS marketing costs for the retailer as well as for the consumer when interacting. Full integration with consumers' online ordering and retail interaction habits will see a robust ROI for retail customers of Squace. This approach requires a partnership with domain experts in the retail sector and smooth integration with tools such as Facebook, Twitter, Gmail, and MS Exchange plus loyalty service providers, EPoSS vendors, retail marketing commerce, and CRM specialists.

Travel and events. Squace is seeking to gain knowledgeable partners in the travel industry and the organizations that promote and book events. Again the integration with social media sites will be important, and as well as the consultancy and setup fees involved there is an opportunity to generate a share of advertising and transactional revenues.

Directory and contact services. Squace can offer a low-threshold marketing opportunity to these types of companies with plenty of scope for referrals that could generate income. To do this there will need to be more emphasis on monitoring and billing of activities and the dedicated management of the vendors contact books. Integration of personal network services such as LinkedIn might also be important here, as will partnerships with specialist telco service providers.

Licensing and payment options for services and content

Squace is also considering multiple mechanisms by which it can charge for usage of their services. They could offer significant organizations a perpetual license, a term-based license of pay per usage on a software-as-a-service (SaaS) model. Whatever mechanisms are offered there will be a need to track software downloads and charge for them on a named or concurrent user basis or some form of micropayment if charging the end user for the license. They may also provide free licenses for partners or joint initiatives up to a certain threshold of users. Squace is launching with multiple variations of the model.

User perspective

- Free. The existing service and software is free to the user community but has embedded advertising.
- Premium. In the near future Squace will offer premium services to the user community for which it will charge a small monthly fee.

Business perspective

- Download-related fees. At the first download Squace will contain a start package with a set of links, interactive applications, and background images. This package will be related to the site from where the download is initiated and the origin of the phone number. Content providers will be charged for their presence if they ask for this.
- Usage-related fees. Squace reserves a unique area of the small screen device for its sponsored links bar. Within this bar an advertisement service will be provided, such as currently available at Google Search. Links in this bar will always be relevant for the user.
- Setup fees. In the short term Squace will charge a setup fee whenever a content or service provider wants to launch a campaign with support from Squace. In the mid-term this process should belong to business development partners for advanced campaigns and should be self-supporting for basic ones.

Ovum comment

So far Squace has only released preliminary versions of the software, yet has generated something over 600,000 accounts to date. Those that use it most have come from more closely knit groups of people who have found the sharing and collaborative social networking aspects to be of significant value.

We think that Squace is right to consider all options and channels to market, and to test them in different verticals and geographies. The key here is to get the commitment of partners that have established user communities.

COMPETITIVE POSITIONING

At the start of this paper we looked at the issues around end users moving between the multiple ecosystems relating to the mobile hardware and platform. Competing head on with the managed device vendors such as Apple will be tough. If the manufacturers adopting Google's Android environment don't maintain consistency then users within that ecosystem might see flaws in that approach. Generally end users that are part of a community that values a common look and feel or that needs to be flexible with regard to which handset is used will certainly see the benefits of Squace.

There are certainly environments that compete more directly with Squace. Microsoft’s OneApp is a UMI lookalike running on the Microsoft platform. There are also mobile browsers such as Opera Mini, BOLT, and Skyfire. Squace’s advantage over these is its server-based links and its universal contact features, and universal look and feel regardless of platform. There are also those developing improved all-in-one communications and contact repositories such as Nimbuzz, fring, ZYB, and eBuddy.

Mobile marketing

If we look more widely at the B2B partners that Squace is supporting there are further competitive issues based on ease of distribution and the cost of developing applications and content for the different ecosystems.

Table 4 considers the options for adopting different platforms for mobile marketing purposes.

Table 4: Mobile marketing options					
	WEB	WAP	Own Client	App	UMI
User Experience	Red	Yellow	Green	Green	Green
Ease of getting started	Green	Green	Red	Yellow	Yellow
Look & feel	Red	Yellow	Green	Green	Yellow
Own development avoided	Green	Red	Red	Red	Yellow
Initial Cost	Green	Yellow	Red	Red	Yellow
Operational Cost	Green	Yellow	Red	Green	Green
Flexibility	Green	Yellow	Yellow	Yellow	Green
Time to market	Green	Yellow	Red	Yellow	Green
Addressable market	Yellow	Green	Yellow	Red	Green
Distribution efficiency	Yellow	Yellow	Red	Yellow	Green

Read more about UMI at: <http://universalmobileinterface.wordpress.com/>

Source: Squace OVUM

As can be seen in the table, where red is poor and green is strong, there are some key considerations to make depending on the ambition level and the expected value of mobile marketing. The table highlights the potential strength of the UMI compared to other alternatives. Whether UMI is the best option does however depend on what you would like to achieve. It is important that those entering this market analyze what’s needed and explore the market before rushing to make such a choice of platform.

Application development cost

Currently, bringing a new application to market involves ensuring that it is developed and tested for use on a number of different platforms. It is also interesting to note that rather than consolidation there continues to be a degree of fragmentation offering up ever more options. Clearly the temptation is to port to the most popular environments first, but to gain wide adoption it may be necessary to ensure that the majority of ecosystems are covered. This significantly increases the cost of deployment. Developing for the UMI will reduce this cost maybe by something in the order of 75%. In this case the time to value, when the developer will see a return on their investment, is earlier and makes the development of new services less of a risk and potentially more rewarding.

Ovum comment

From the end user's perspective Squace's combination of device independence, personalization, consolidated contact book, performance, and ease of use makes it different, at least for the moment.

From the application developer or web marketer's viewpoint it offers potentially reduced cost and risk, and eases the route to market.

The window of opportunity to exploit this advantage won't last long, but a strong launch and viral adoption could see it far enough ahead of any competitors to make a real impact in this market.

CHANNEL STRATEGY**Potential technology and distribution partners**

Squace has just commenced its channel and partner strategy implementation targeting best-of-breed international technology enablers from the following key sectors:

- Internet and mobile application developers with local and/or international presence (LBI, WebPower, Service2Media)
- scalable and secure mobile commerce/transaction capabilities globally and regionally (Monetize, UPAID, PayPal, Sybase, Ogone)
- CMS system providers (EPiServer, WordPres, sm Extro, FatWire, SDL)
- international ad networks/ad servers/analytics specialists – integration (AdMob, Ad2One, MADS, YOC, Quattro, Millennial, InMobi, Comverse, Google)
- enterprise-scale SMS delivery via international aggregator partners (Sybase365/SAP, mBlox, Netsize, Clickatell, Acision)
- mobile ticketing, coupon, voucher/pin code based issue and redemption with mCRM capability and loyalty (LM, Nectar, Eagle Eye, Trinity, Mobillze Systems, Valassis, Catalina, Codilink, Groupon, Best Buy)
- mobile augmented reality functionality (Layar, Metaio, Mobilizy, Mobile Acuity)
- voice activation and recognition application integration (Vlingo, Nuance)
- rich media compression/streaming partners (Saffron Media, Mobile Streams, HunGama, IMImobile)
- measurable barcode scanning (NeoMedia, 3gVision, Scanbuy)
- NFC capabilities for commerce/ticketing and security (Broadcom, Oberthur, ATOS, ViVOtech)
- VOIP and intelligent call routing (Rebtel, Skype)
- social and business networking players (LinkedIn, E.Factor, Facebook, MySpace, Gmail, Hypios, Bizk.IT)
- partnerships with leading search providers to provide users with optimal search without typing
- mobile handset manufacturers (partnerships that enable Squace to be preinstalled on the devices are also being sought with top-tier handset vendors and targeted handset brands).

Distribution strategy

Squace is actively looking for a variety of partners in the 'bowling alley' markets we identified in the go-to-market strategy section of this paper, and others. The list includes:

- web application developers
- mobile application developers
- OEM partners
- CMS vendors
- ERP and other enterprise system vendors
- loyalty systems, mobile coupons
- distribution partners
- download services
- operators and appstores

Distribution is fundamentally under the control of Squace, as all (user-generated) bookmarks are indexed by them. Squace content will score highly when searching the Web which will drive distribution.

Ovum comment

The embedded 360° distribution engine in conjunction with a focused viral marketing plan may enable Squace to penetrate the market very quickly. The number of downloads of the preliminary releases already shows some proof of this. However, the real value of Squace emerges when users start to use it for their everyday life. At this time the number of page views will massively increase. Users will adopt this mode faster when Squace embeds mobile access to functionality that is specific to the particular user. Therefore Squace's appetite for partners is rapacious. To encourage partners Squace offers them a new revenue opportunity with a very low threshold, from both a cost and a time-to-market perspective. The bandwidth required to establish all these relationships and to manage them is going to be quite a challenge to Squace's management team. This is certainly an area where venture capital funding will be a critical element of their potential success.

MARKETING STRATEGY

Squace's marketing focus is on the following segments: online communities, retail chains, travel, sports and events, and directory and contact services as well as qualified enterprise audiences. In all cases they aim to gain and develop B2B customers/partners with a significant customer/user base, giving them distribution opportunities for the Squace client.

Squace commenced its marketing and sales activity in Q2 2010 in three European countries (Sweden, the UK, and the Netherlands). However, the service itself is available globally.

Squace plans to build a global footprint and evolve its ecosystem through qualified customer targeting and key distribution partner acquisition.

Ovum comment

Squace intends to develop at least twenty B2B partners in its target markets over the next 18 months. If these have significant reach it could radically enhance the profile of Squace and be a trigger to the viral marketing they seek.

MARKET DEMAND AND POTENTIAL FOR VIRAL SALES

Squace is putting a significant amount of faith in the 'sticky nature' of its distribution model. Anyone passing contact details, publishing and sharing links, or making use of partners' and distributors' services is likely to be given an easy opportunity to download and use the Squace interface.

Squace has already noticed that the download rate is higher from specific content sites where there is a community of interest around the content (e.g. Sportnik, an online sports community, where the download rate was 36%, or an even higher rate of 50% for some micro communities such as schools and day care centers) rather than from generic sites (e.g., Squace's own site where the download rate was 9%).

Therefore, having sites that offer a 'value add' through the use of Squace is extremely important. If users feel that by downloading Squace they are getting access to something not readily available through other means then the viral marketing will be enhanced.

Ovum comment

It is difficult to judge when something is about to grow at a phenomenal rate through viral marketing. It just seems to happen. The fact that having reviewed and used the solution I have now adopted it as my personal interface to the mobile Web does mean that once seen it has a good opportunity to spread through word of mouth. Squace must make sure that the download and installation is extremely smooth and easy. They have noticed that around half of those who start to register fail to complete the process. This can be due to all manner of reasons including a firewall that block cookies, for example, but it is very important that any such barriers are eliminated.

FINANCIAL PROSPECTS

The current finances of Squace rely on venture funding and on the income from the consultancy and setup fees to partnering companies and the B2B communities. A breakeven point is expected to be reached during 2010 as income from these initiatives starts to come through. Squace has given us a summary of their potential income, in table five shown below.

Table 5: Potential income				
# of users * 1,000	1,000	10,000	100,000	500,000
Acquisition cost per user/year	€ 0.89	€ 0.40	€ 0.30	€ 0.25
Operational cost per user/year	€ 0.48	€ 0.44	€ 0.40	€ 0.36
Income year 1	(€370,000)	€1,600,000	€30,000,000	€195,000,000
Revenue per user €1				
Income year 2	€1,520,000	€11,600,000	€130,000,000	€820,000,000
Revenue per user €2				
Income year 3	€4,520,000	€41,600,000	€430,000,000	€2,320,000,000
Revenue per user €5				
Source: Squace				O V U M

The model assumes that there is income from both embedded usage of Squace and from the sale of premium services.

Ovum comment

These figures are modest given the potential size of the market. Nevertheless they require a considerable degree of success in the chosen target markets and the support of some key partners. Ovum is not in a position to make a judgment on the degree of certainty that can be given to these figures, but they are a realistic reflection of what would occur if Squace achieved a reasonable level of success.

SUMMARY AND ASSESSMENT

The concept of a universal mobile interface is appealing for many reasons. The independence it affords from tie-in to specific vendors, platforms, and distribution mechanisms will appeal to all those who prefer an open environment.

For the B2B environment it is the potential to increase the return on investment and to get to market as broadly and as quickly as possible.

Ovum is particularly supportive of the elimination of the boundary between the use of desk-bound Internet usage and that of all forms of mobile device. Squace's use of cloud-based capabilities to merge these two areas and make the mobile experience even simpler is, we believe, very innovative.

Squace clearly has an excellent market opportunity, but its time to market and final level of success will depend on the partnerships it can make and its continued funding.

Table 6: Contact Details**Squace AB**

Döbelngatan 48

Stockholm

Sweden

Email: info@squace.comwww.squace.com

Source: Squace

O V U M

Ovum's Knowledge Centers are new premium services offering the entire suite of Ovum information in fully interactive formats. To find out more about Knowledge Centers and our research, contact us:

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