EVALUESERVE

Fostering the Mobile Ecosystem by Resolving Lock-in Effects

Oct 2025

MCF
Mobile Content Forum

사단법인 디지털산업정책협회
DIGITAL INDUSTRY POLICY ASSOCIATION

digital prosperity asia

Agenda for Discussion

The Importance of Interoperability: Facilitating a Competitive Market Environment

For Consumers

01 Enhanced User Experience & Choice

02 Secure, Cross-platform Transfer of Sensitive Information (e.g., eHealth)

For Industries

01 Increased Innovation & Competition

02 Lower Barriers to Entry for New Players

03 Reduced Development Costs & Time-to-Market

04 Widen User Reach & Market Access

Research Methodology

A 360-degree Approach
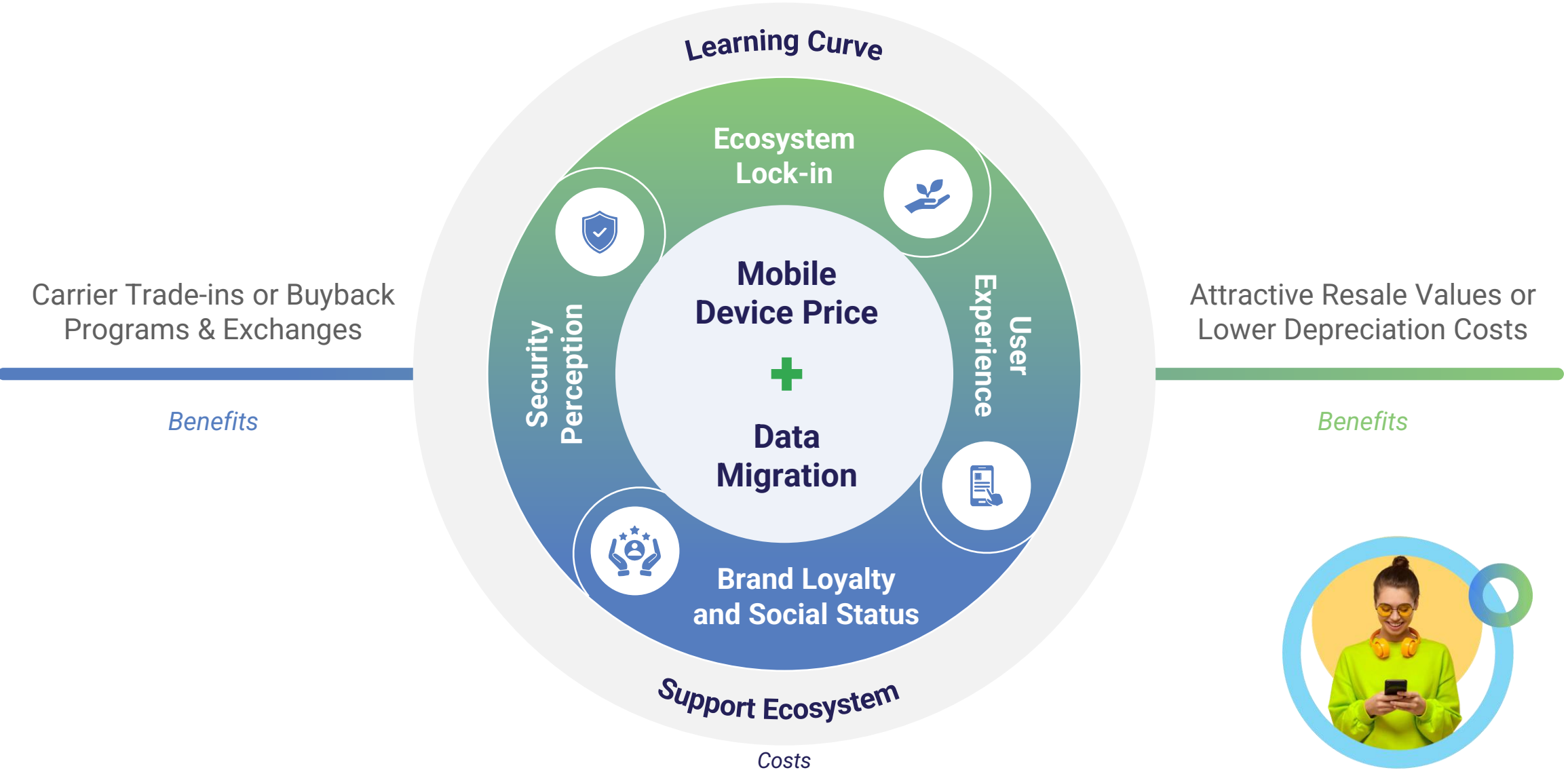
Extensive
Desk Research

15
In-Depth
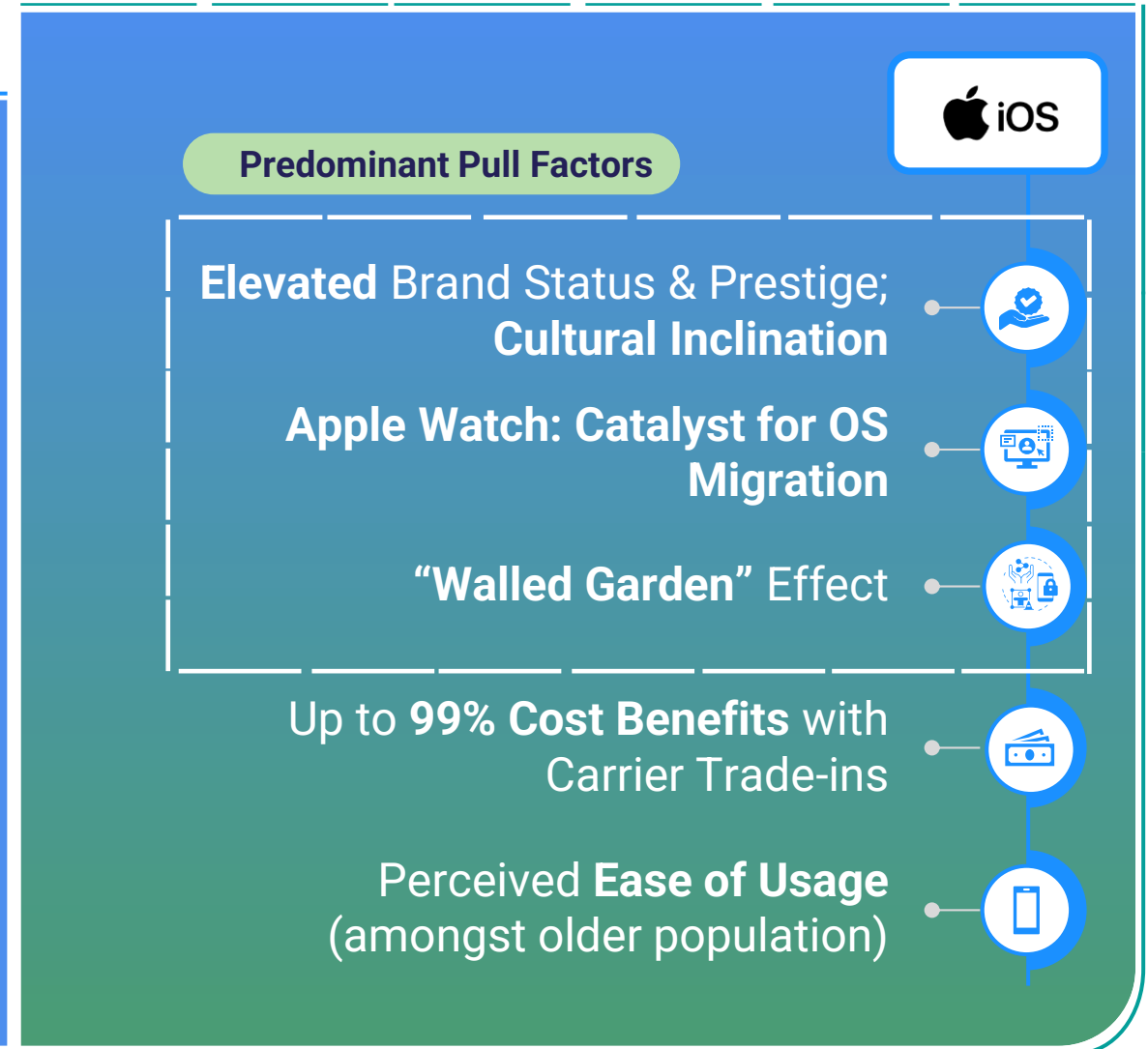Expert Consultations

Hands-on
Device Testing

2,250
Consumer Surveys

Navigating Monetary and Non-Monetary Mobile Switching Costs

Learning Curve

Ecosystem
Lock-in

Security
Perception

Mobile
Device Price

+

Data
Migration

User
Experience

Brand Loyalty
and Social Status

Support Ecosystem

Carrier Trade-ins or Buyback
Programs & Exchanges

Benefits

Attractive Resale Values or
Lower Depreciation Costs

Benefits

Costs

Ecosystem Switching Difficulty: Android and iOS Platforms

Android

- **Devices in a Wide Price Range**
- **$460 Cost Advantage** on Average
- **Open** Ecosystem
- **Innovation** (Foldables, AI)

iOS

Predominant Pull Factors

- **Elevated** Brand Status & Prestige; **Cultural Inclination**
- **Apple Watch: Catalyst for OS Migration**
- **"Walled Garden"** Effect

- Up to **99% Cost Benefits** with Carrier Trade-ins
- Perceived **Ease of Usage** (amongst older population)
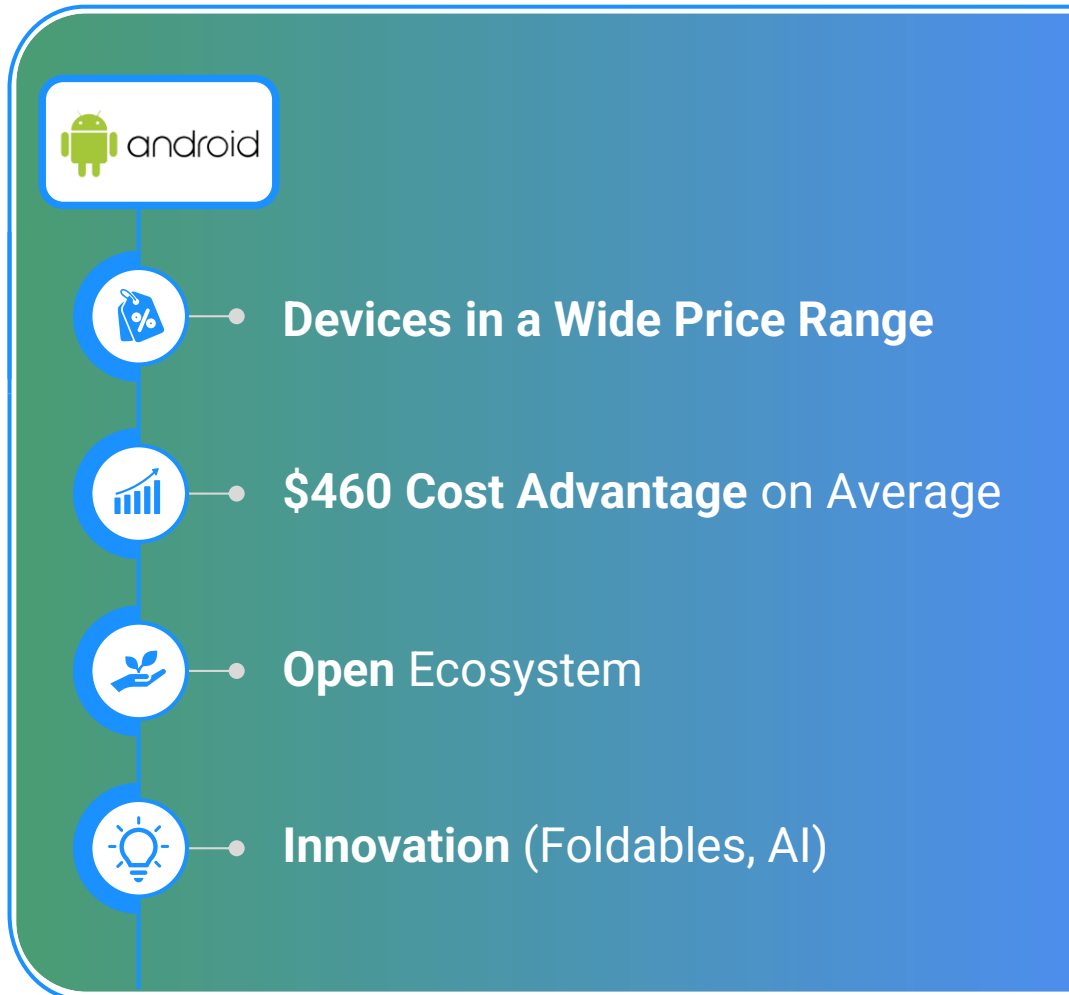
Android's Appeal in Japan: Beyond iOS Dominance

OS Market Share – iOS vs. Android (2021-25)

66.5%   65.9%   68.8%   60.8%   60.6%

33.3%   34.0%   31.1%   39.0%   39.2%

2021   2022   2023   2024   As of Sep 2025

— iOS   — Android
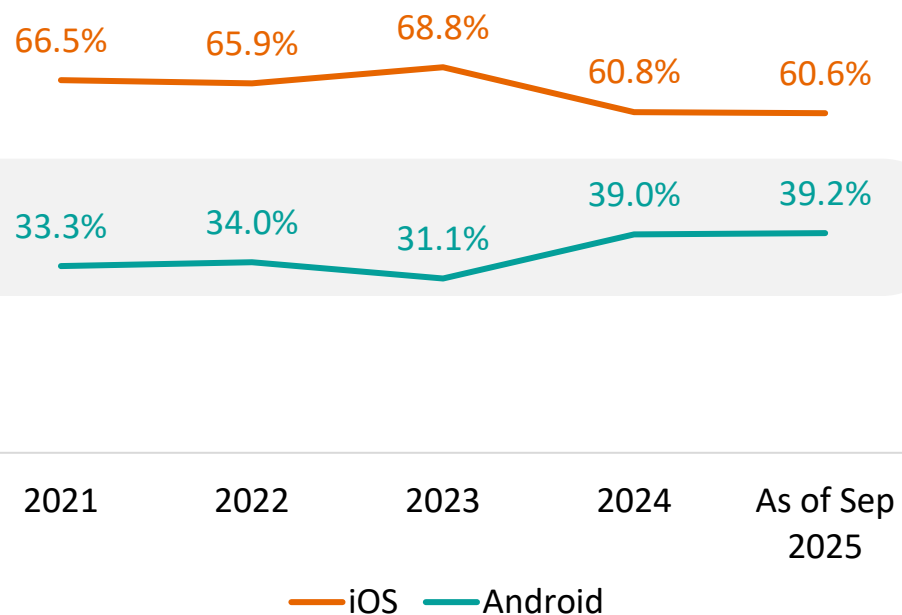
Source: StatCounter

android

Carrier-Friendly – Ability to customize and pre-load carrier apps

Higher-Degree of **UI/UX Customizations and** the Ability to **Install 3rd-Party Apps**

Foldable Form **Factor Becoming Popular Amongst** Tech-Savvy Consumers

Lucrative Carrier Trade-Ins

Recommendations for a More Open Ecosystem

01

Improve Data Migration When Switching Devices

- Enable Seamless Transfer of Application Data
- Ensure Data Integrity during Transition

02

Enhance Data Sharing Across OS

- Standardize Peer-to-Peer File Sharing
- Guarantee Cloud Service Access

03

Better Cross-Device Support

- Enhance Synchronization in Multi-Device Environments
- Develop Interoperable Smart Devices, Especially for Commoditized Features

Call to Action

01 **Deliver True Interoperability**

- **Mandate Data Portability**
- **Standardize Core Functions**
  - Device Setup and Compatibility for Connected Physical Devices
  - High-Bandwidth Peer-to-Peer File Transfer

02 **Empower Consumers And Developers**

- **Ensure User-Friendly Defaults**
- **Allow Open App Distribution**
- **Non-Discriminatory Access to Tools**

Thank you