

## Times They Are a-Changin'

Maybe it's all these high school and college commencement addresses that are doing it. It's not the end of the calendar year or anything like that. But in more than one way, it feels like the end of one thing and the beginning of something else.

Just two weeks ago, the industry got together for its annual spring confab in New Orleans – a couple months or six weeks later than we've traditionally convened for the big spring CTIA show. That event marked seven years since the trade show had been held in New Orleans, and it invited all sorts of before-Katrina memories.

In 2005, Tim Donahue, president and CEO of Nextel Communications, was on CTIA's Board of Directors, along with Scott Ford, president and CEO of Alltel, and Dennis Miller, president and CEO of Midwest Wireless. The chairman at that time was Terry Addington, CEO of First Cellular of Southern Illinois. Len Lauer, then president and COO of Sprint, served as vice chairman, and Michael Kalogris, then CEO of Triton PCS, was treasurer. How time flies.

Today, Google CEO Larry Page posted [a blog](#) [1] announcing that the online search giant has closed on the acquisition of Motorola Mobility, which is largely responsible for cultivating the present-day U.S. cellular industry. We all know the stories of Marty Cooper and his historic phone call to Joel Engel at Bell Labs.

We also know about the successes of the StarTAC, the RAZR and later, the dawdle to 3G and the fall from grace. Then there was redemption to some degree or another. And Motorola made some big bets along the way. iDEN wasn't a sure thing when that effort got under way, but it served its purpose for a time and was a big draw for workers who relied on it – and still do, to some extent or another, as Sprint tries to hold onto its old iDEN subscribers in its transition to a CDMA version of push-to-talk. No doubt, not everyone was 100 percent sure of Android when that decision came around for Motorola, pre-Google ownership.

But bet it did, and it turned out to be the right one, and not just for former CEO Sanjay Jha, who gets to walk away with millions of dollars in his Golden Parachute. Investors look to be getting a pretty good payback from the deal as well. Now the responsibility lies with the new chief of Google's version of Motorola Mobility, Dennis Woodside, a 9-year Google veteran.

One of his first jobs at Google was to “put on his backpack and build our business across the Middle East, Africa, Eastern Europe and Russia,” Page said in his blog. More recently, Woodside helped Google increase its revenue in the U.S. from \$10.8 billion to \$17.5 billion as president of the Americas region. OK, sounds like he's got more than a little moxie.

As an aside, it's not a real stretch to take that backpack-packing statement literally.

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Page also notes that Woodside happens to be an Ironman triathlete – and that he's already off to a great start with some very strong new hires for the Motorola team. So, old Motorola mostly gone, new Motorola being created. We'll see how many Motorola veterans stick around.

Meanwhile, Google has said more than once that it intends to operate Motorola separately and not give it preferential treatment over other OEMs when it comes to Android. It's kind of hard to believe Google wouldn't make darn sure that Motorola has the latest and greatest versions and updates and everything else associated with Android at the earliest possible point in time. We'll see how this all plays out with other OEMs and the timing of the fairest-of-them-all scenarios.

It's also been stated repeatedly how valuable the Motorola patents are to Google. (The idea that more license negotiations could have occurred before the fact doesn't seem to get much airplay these days unless you're in a courtroom.)

It would be a shame if Google just bought Motorola for the patents and didn't capitalize on the other expertise it acquired, and it doesn't sound like that's the case. Word going around is that Google is preparing for numerous new versions of the flagship Nexus, with or without direct carrier support. Google's first attempt to do an end-run around carriers and go direct to consumers didn't turn out so well. It may well keep on trying, even if it seems as though there are too many things that Google can't do well in terms of replacing a service provider. If it proceeds with the unlocked phone/no-contract model, that's likely to lead to further push-back from carriers and then maybe more brazen efforts by certain carriers to back other operating systems and OEMs, like Nokia/Microsoft.

One thing is for sure, at least by my way of thinking. Google – and let's give a nod to Danger/Android founder Andy Rubin and those who brought him into the fold – got it right early on when it identified mobile as the future. The other biggie, Facebook, didn't seem to catch on and in fact still seems to be catching onto that "mobile thing." Many of us were scratching our heads a couple years ago, waiting to hear more about Facebook's mobile advertising strategy, a weakness that was widely reported before and since its IPO. In many eyes, Facebook is a gigantic success despite how its IPO went down and will remain so. Let's just remember that many companies come and go. They have their time in the sunshine and then it fades. What Facebook does in mobile and what it looks like five years from now will be the real test. The rest, as they say, is history.

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### **Links:**

[1] <http://googleblog.blogspot.com/2012/05/weve-acquired-motorola-mobility.html#!/2012/05/weve-acquired-motorola-mobility.html>

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