

Lecture 11

Market Overview of Mobile Operating Systems and Security Aspects

Mobile Business I (WS 2016/17)

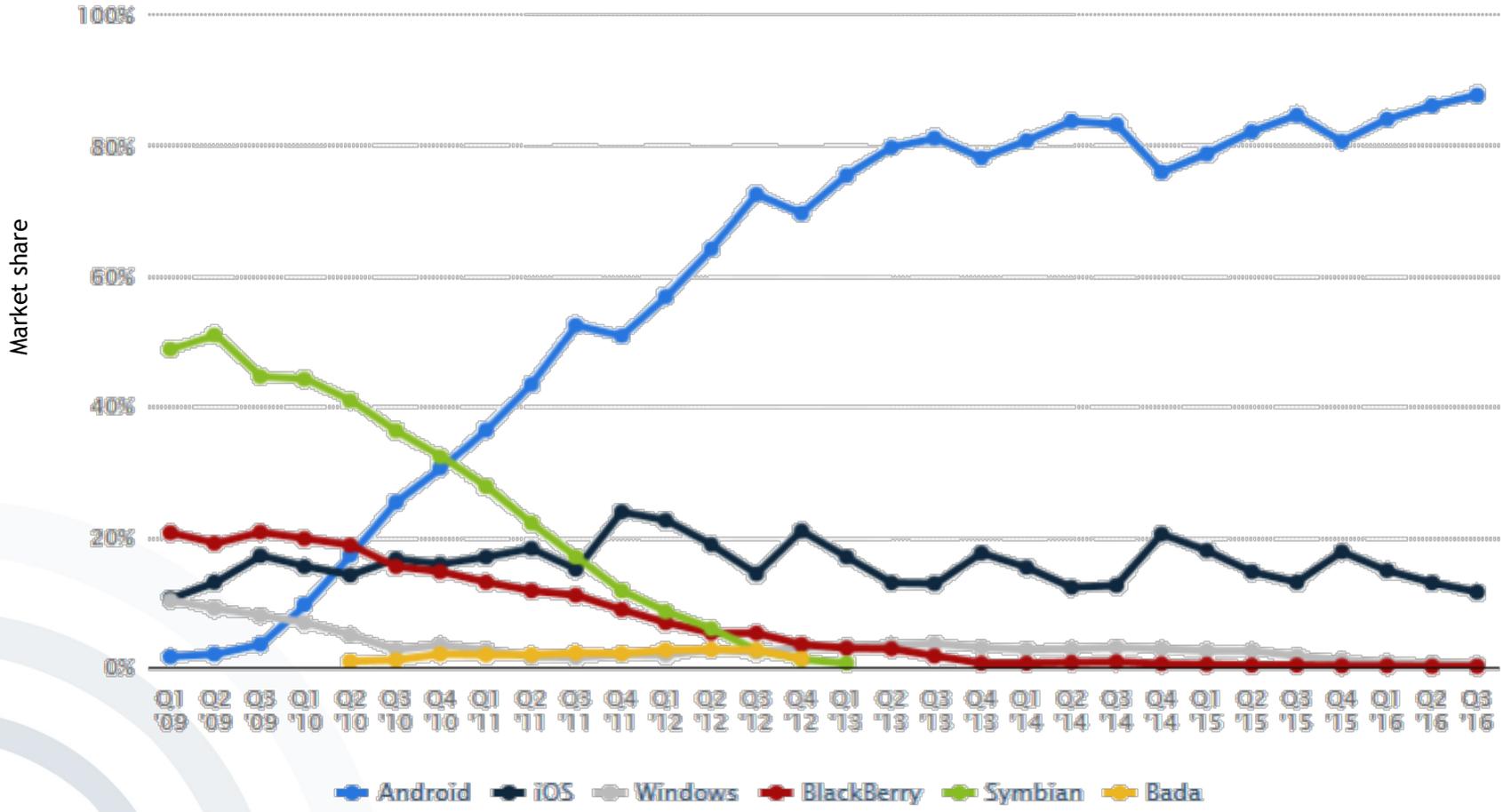
Prof. Dr. Kai Rannenberg

Deutsche Telekom Chair of Mobile Business & Multilateral Security
Johann Wolfgang Goethe University Frankfurt a. M.



- The market for mobile devices and mobile OS
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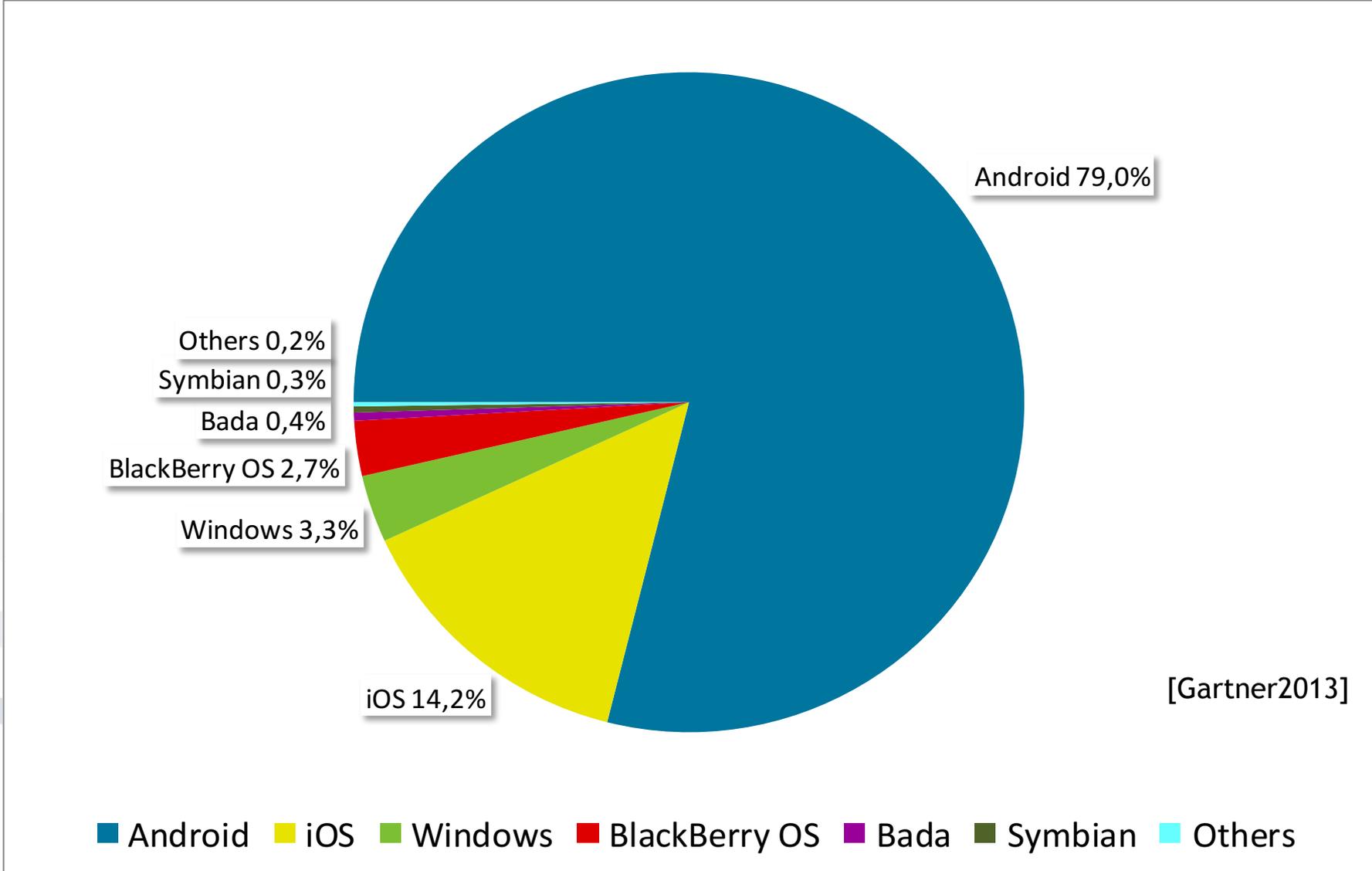
Worldwide smartphone sales to end users by operating system (2009-2016)



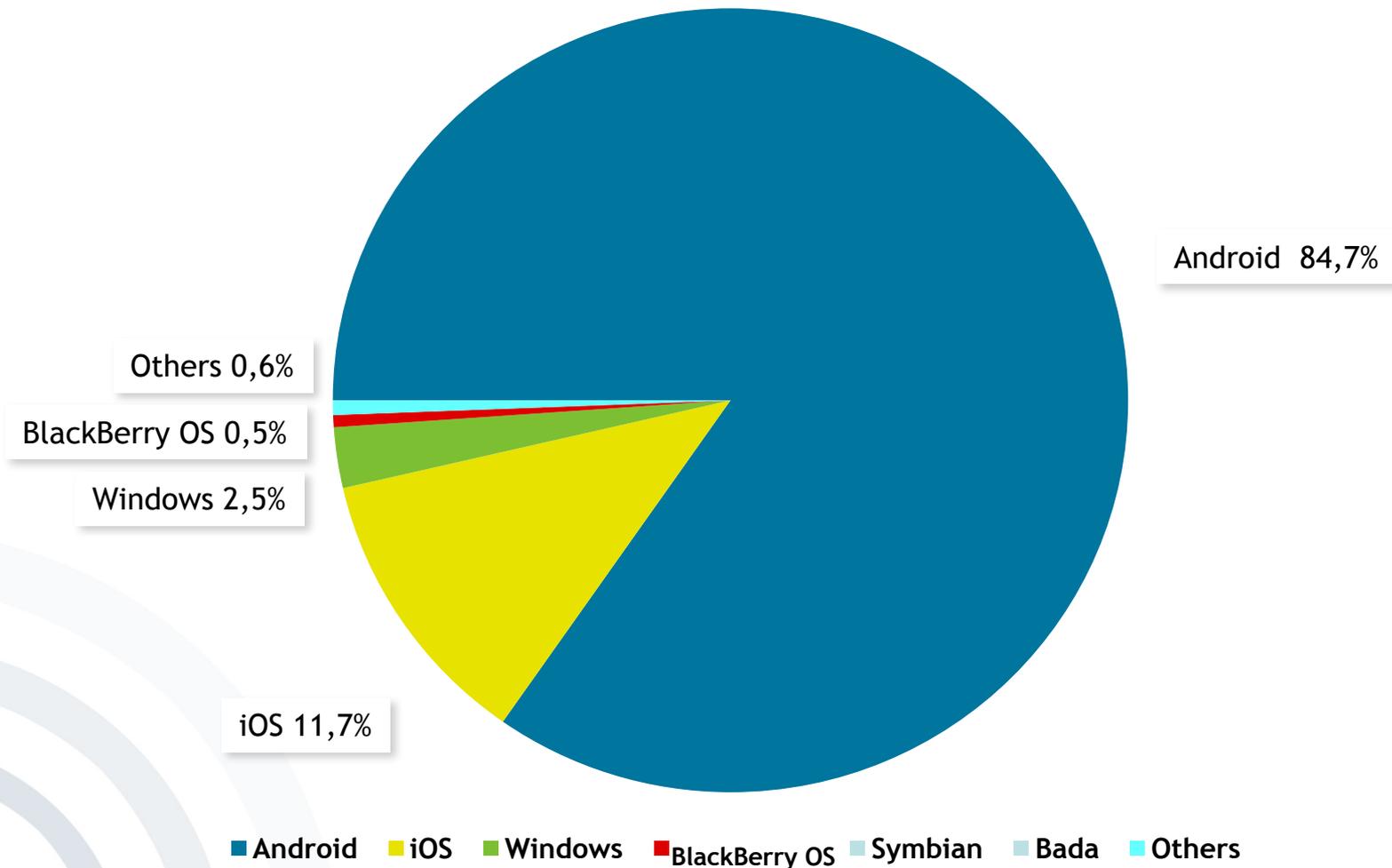
OS

[Statista 2016a]

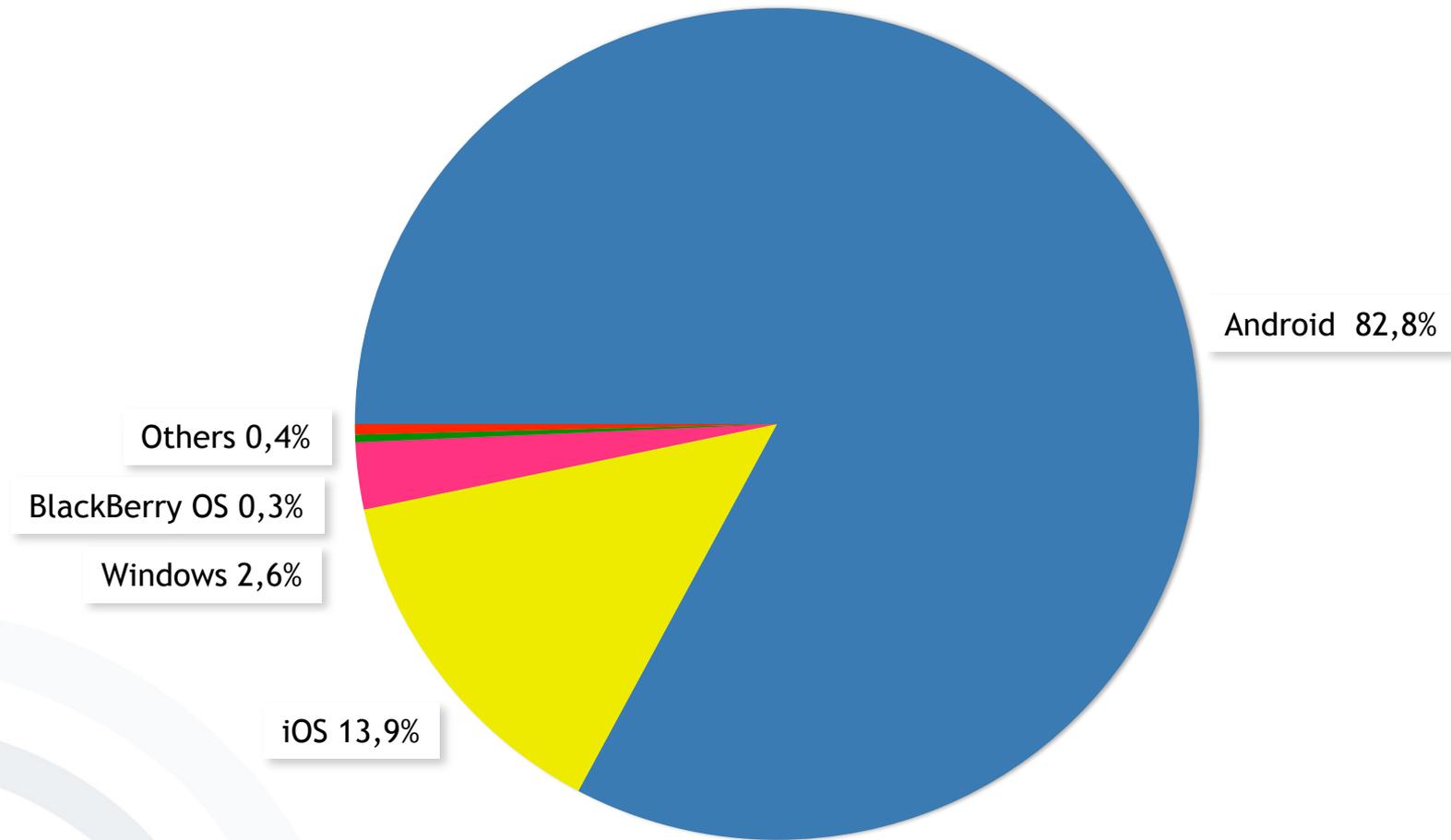
Worldwide smartphone sales to end users by operating system (Q2 2013)



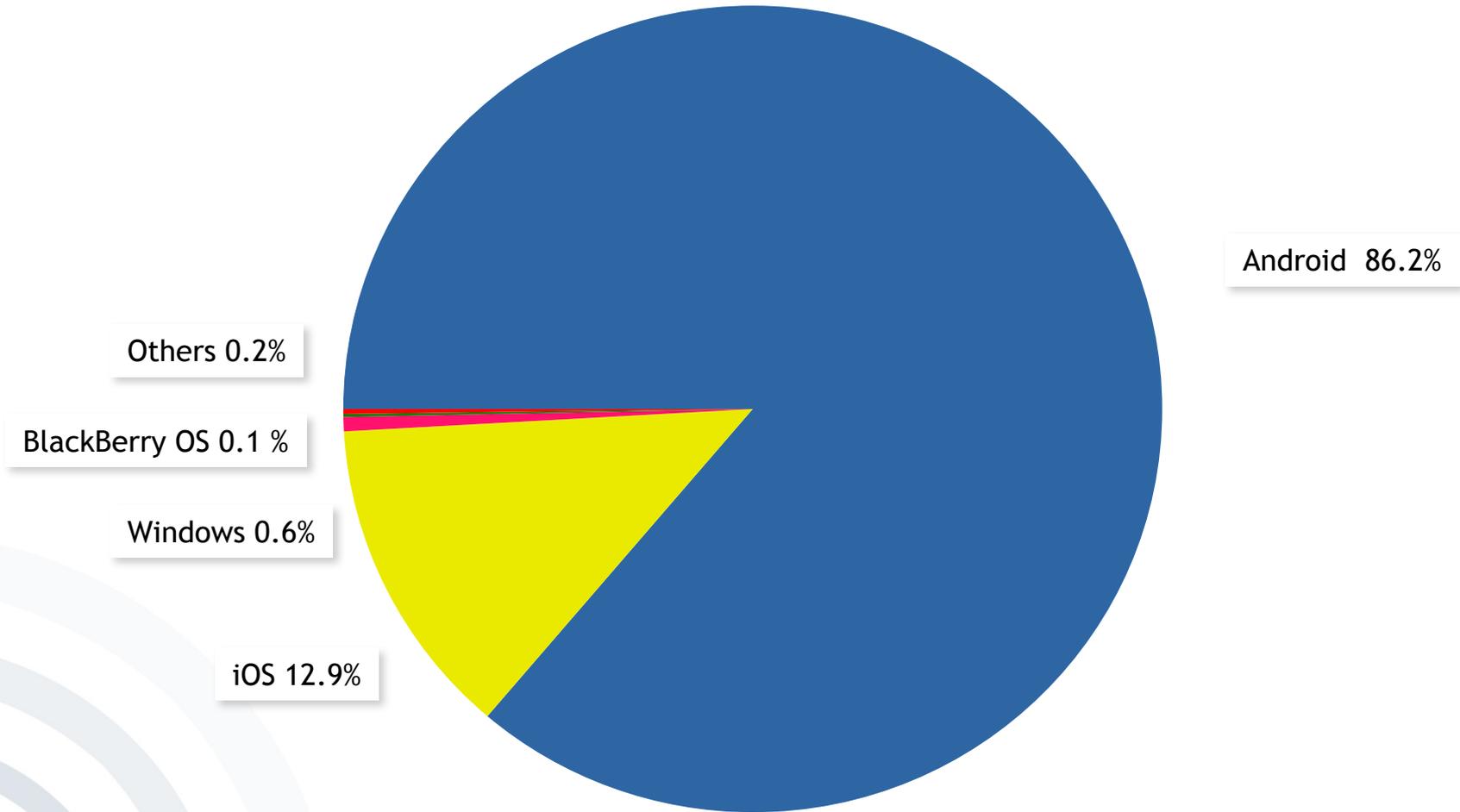
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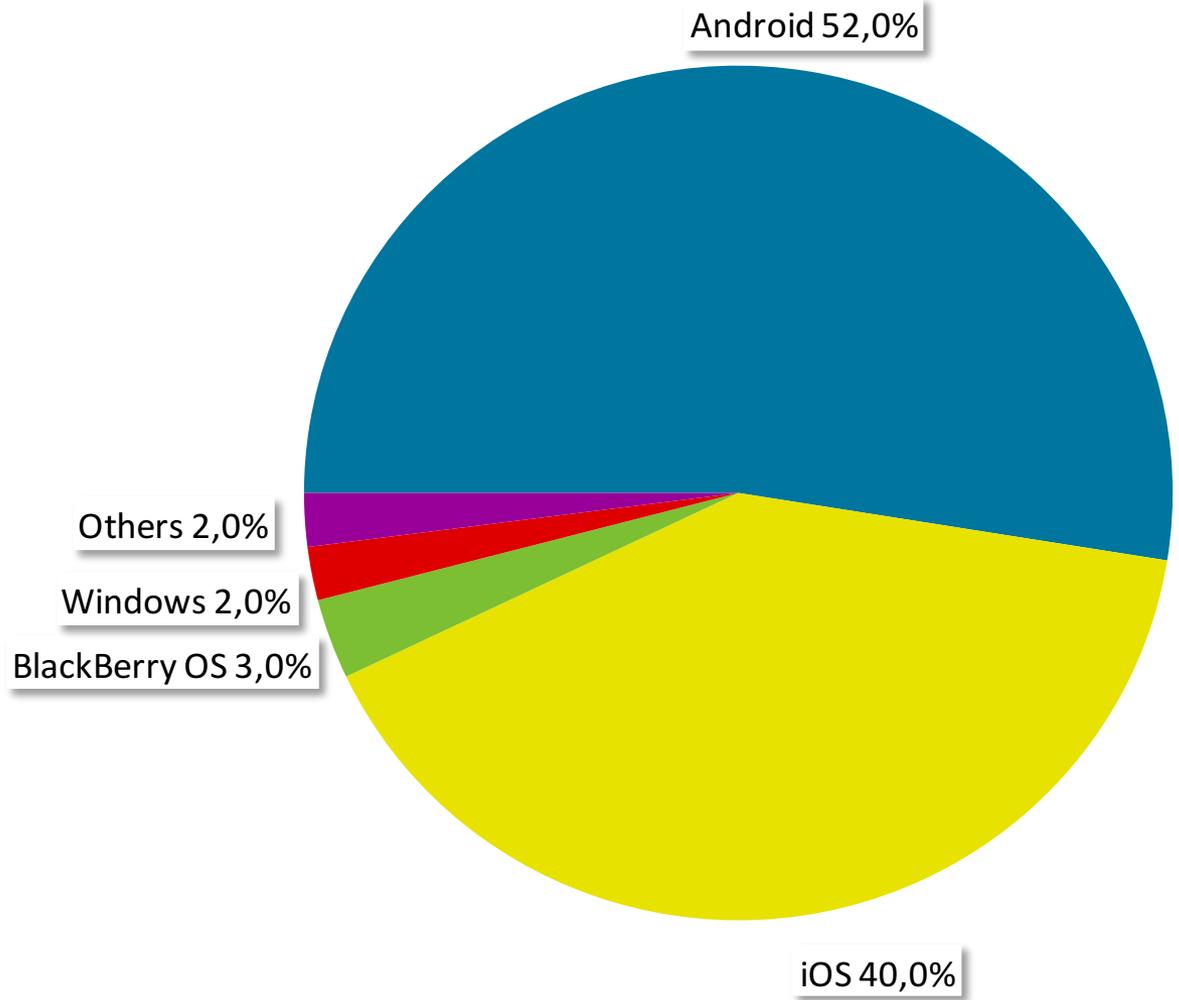
Worldwide smartphone sales to end users by operating system (Q2 2015)



Worldwide smartphone sales to end users by operating system (Q2 2016)



US installed smart phone base by operating system(Q2 2013)



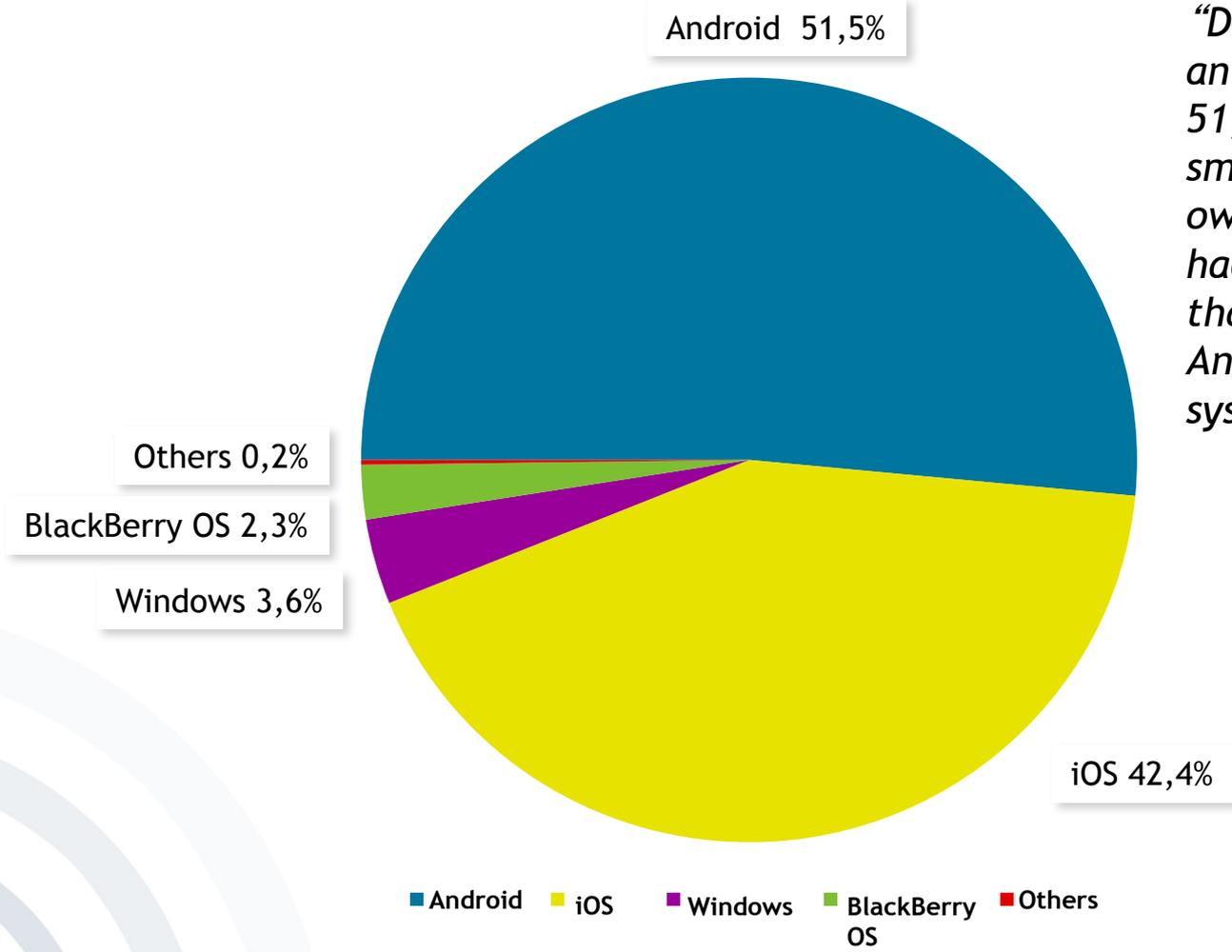
“During Q2 2013 an average of 52% of smartphone owners in the US had a handset that runs on the Android operating system.”

[Nielsen2013]

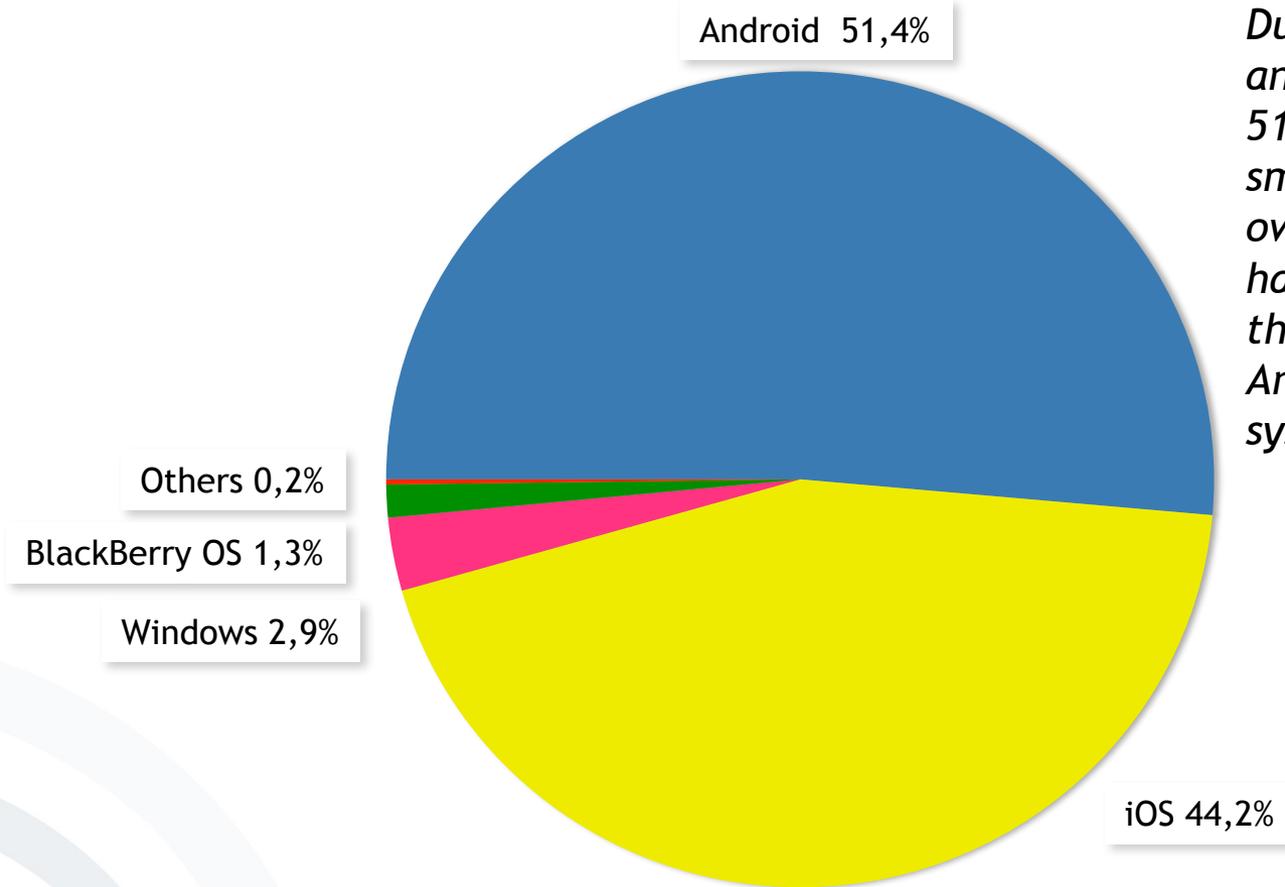
- Android
- iOS
- BlackBerry OS
- Windows
- Others

US installed smart phone base by operating system (July 2014)

*“During July 2014
an average of
51,5% of
smartphone
owners in the US
had a handset
that runs on the
Android operating
system.”*



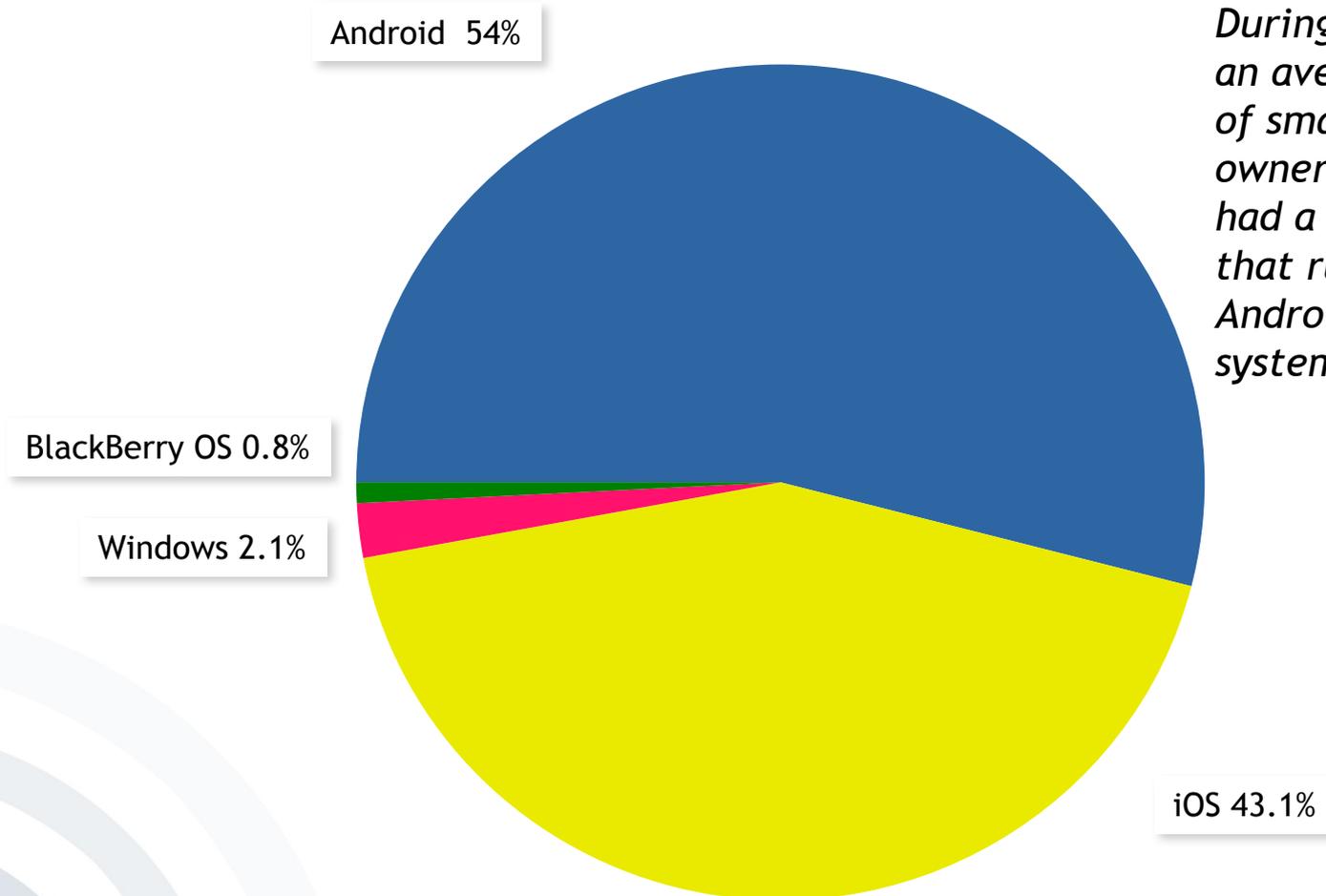
US installed smart phone base by operating system (July 2015)



*During July 2015
an average of
51,4% of
smartphone
owners in the US
had a handset
that runs on the
Android operating
system.*

US installed smart phone base by operating system (July 2016)

*During July 2016
an average of 54%
of smartphone
owners in the US
had a handset
that runs on the
Android operating
system.*



Worldwide smartphone sales to end users
by operating system
Q2-2016 vs. Q2-2015 vs. Q2-2014

In 1.000 Units

Operating System	2Q16 Units	2Q16 Market Share (%)	2Q15 Units	2Q15 Market Share (%)	2Q14 Units	2Q14 Market Share (%)
Android	296,912.8	86.2	271,010	82.2	243,484	83.8
iOS	44,395.0	12.9	48,086	14.6	35,345	12.2
Windows	1,971.0	0.6	8,198	2.5	8,095	2.8
BlackBerry OS	400.4	0.1	1,153	0.3	2,044	0.7
Others	680.6	0.2	1,229.0	0.4	1,416.8	0.5
TOTAL	344,359.7	100.0	329,676.4	100.0	290,384.4	100.0

Worldwide smartphone sales to end users
by vendor
Q2-2016 vs. Q2-2015 vs. Q2-2014

In 1.000 Units

Company	2Q16 Units	2Q16 Market Share (%)	2Q15 Units	2Q15 Market Share (%)	2Q14 Units	2Q14 Market Share (%)
Samsung	76,743.5	22.3	72,072.5	21.9	76,129.2	26.2
Apple	44,395.0	12.9	48,085.5	14.6	35,345.3	12.2
Huawei	30,670.7	8.9	25,825.8	7.8	17,657.7	6.1
Lenovo*	Others		16,405.9	5.0	19,081.2	6.6
Oppo	18,489.6	5.4	others		others	
Xiaomi	15,530.7	4.5	16,064.9	4.9	12,540.8	4.3
Others	158,530.3	46.0	151,221.7	45.9	129,630.2	44.6
TOTAL	344,359.7	100.0	329,676.4	100.0	290,384.4	100

Long term trends (maybe?)

- Big players (originally from neighbouring fields) often have some (sometimes relatively modest) market share due to high investment:
 - Microsoft: Architectures, operating systems
 - Nokia: Feature phones
- Killer Application Champions are very successful for some time until their killer application is also available from the big players:
 - Palm: 1st small and affordable PDA with address book, calendar, and PC connectivity
 - RIM Blackberry: 1st PDA phone with push email

- Due to the limitations of the mobile devices, mobile operating systems also have to cope with the following challenges:
 - Limited device capabilities and resources (storage, memory, processing time, etc.)
 - Usability issues
 - Security and system integrity issues

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- Originally, most mobile phone manufacturers used their own “closed” operating systems for their mobile devices.



- *Palm OS (Garnet OS)*
 - Latest release: Palm OS Cobalt 6.1



- Apple *iOS* (Unix-based)
 - Latest release: iOS 10.1



- *BlackBerry OS*
 - Latest release: BlackBerry OS 10.3.3
 - Newer Blackberry models (*PRIV, DTEK60, and DTEK50*) run on Android



Lune OS

- *LuneOS* (formerly WebOS, initially developed by Palm, later HP)
 - Latest release: LuneOS Caffè Tobio
 - Not to be confused with Palm OS (now: Garnet OS) that was also initially developed by Palm

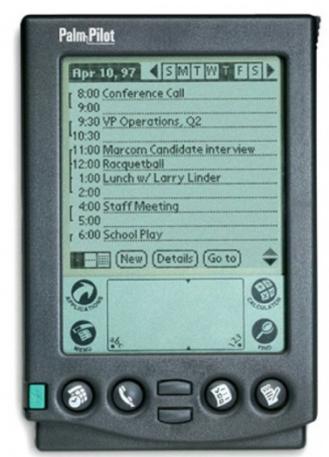


Samsung bada

- Latest release: v2.0, e.g. on Samsung Wave 3 S8600 (discontinued 2013)

- **Advantage:** Tend to be not as much affected by malware than “open” operating systems
- **Disadvantage:** Less flexible, as 3rd-party software cannot be easily installed and executed
- Later, more and more platforms switched to more open and interoperable operating systems (e.g. Windows CE, Symbian OS, Android).

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All screens are simulated.

- The operating system is made by *palmsource*
- Several device manufacturers:
 - Palm (e.g. Treo series)
 - Handspring
 - Garmin (navigation devices)
 - Fossil
 - Samsung
 - Sony
 - ...
- Current version 6.1 (Cobalt)
 - There are no devices using version 6.1 on the market. Most of the devices are equipped with Palm OS 5.4 (Garnet), such as the Tungsten series.



- Communication:
 - IrDA
 - Bluetooth
 - WiFi (IEEE 802.11)
 - GSM/GPRS
 - CDMA
- Support of the TCP/IP network protocol
- Integrated personal information management (PIM)
- Support for several encryption and security algorithms (e.g. RSA, SHA1, RC4)
- Large choice of 3rd party software available
- Long battery life



- 1996: Palm Pilot 1000, first device using Palm OS
- 1998: Palm III using Palm OS v3
- 2000: Palm IIIc, first device using Palm OS and a colour display
- 2003: Palm OS 5
- 2004: Palm OS 6.1 (Cobalt) and Palm OS 5.4 (Garnet)
- 2006: Palm's "*Treo Smartphones*" with Windows Mobile
- Name change to Garnet OS - future versions to be based on the Access Linux platform
- 2010: Hewlett-Packard acquired Palm for \$1,2 billion, name change to HPwebOS
- 2011: HP announced to stop the production of all HPwebOS devices, including smart phones and tablets

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Apple iOS



- Developed by Apple for iPhone, iPod Touch, iPad and Apple TV
- Latest release: iOS 10
- iOS derived from Mac OS X, a Unix-based operating system
- Apple does not permit the OS to run on third-party hardware
- User-interface uses multi-touch gestures



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- Linux: LiMo (Linux Mobile), Openmoko Linux, Qt Extended (Qtopia)



- Symbian platform

- Latest release: "Nokia Belle Feature Pack 2" for Symbian^3 devices



Android 7.0 Nougat

- Android (by Open Handset Alliance)



- Latest release: 7.1 (Nougat)



- Windows Mobile

- Latest release: Windows 10 Mobile 1607 (10.0.14393.479)



- Windows Phone

- Latest release: Windows Phone 8.1



- Maemo (by Nokia) → MeeGo (by Nokia, Intel) → Sailfish OS (by Jolla)

- Latest release: Sailfish OS 2.0.5.6 (Haapajoki) (November 2016)



- Tizen (by Samsung, Intel, Linux Foundation)



- Latest release: 3.0 (September 2016)



- Firefox OS (by non-profit organisation Mozilla)



- Latest release: 2.2.0 (April 2015)

- China-Focused Mobile OS

- Currently under development by Taiwan-based HTC [WSJ2013]



= Linux-based

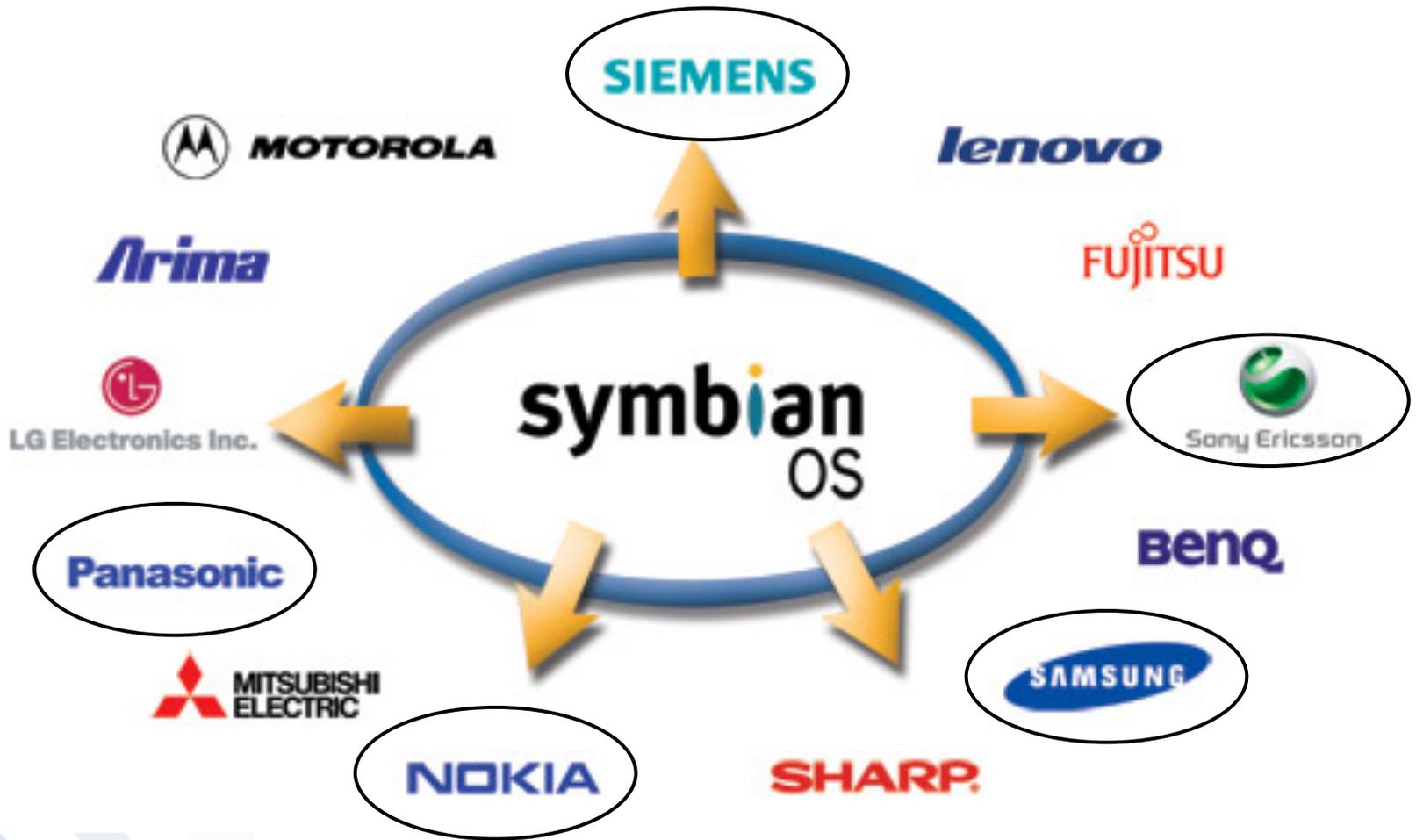
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symbian

Symbian OS - the mobile operating system





In 2006, Symbian was owned by

- Symbian was founded as a privately owned company in June 1998.
- Owner: Ericsson, Nokia, Panasonic, Psion, Samsung Electronics, Siemens and Sony Ericsson
- „Open“ Symbian OS telephones were available since 2001
 - „Open“: It is possible to install 3rd-party applications.
 - Beginning of 2001: Nokia 9210 Communicator
- 2004: Symbian OS 8.0
- 2005: Symbian OS 9.1 (S60 3rd edition)
- 2006: Symbian OS 9.3 released, extending the OS with WiFi and HSDPA
- 2007: Symbian OS 9.4 (S60 5th edition) = Symbian^1 („Symbian One“)
- 2008 June: **Symbian Foundation** announced
- 2008 December: **Nokia** buys Symbian Ltd. and becomes the **major contributor** to code of Symbian platform



- 2009: Symbian Foundation founded
Symbian platform successor to Symbian OS and Nokia Series 60.
- 2010: Symbian OS 9.5 (Symbian^3). Nokia N8 first smartphone to run Symbian^3.
- 2010 November: Due to a lack of support from funding members, **Symbian Foundation transition into a licensing-only organisation**. Nokia takes over governance of the Symbian platform.
- 2011: Symbian Anna and Symbian Belle as an update to Symbian^3
- 2011 February: Nokia collaborates with Microsoft and adopts Windows Phone 7 for their smartphones. **Relevance of Symbian platform, especially in the mobile app market, drops significantly**. Market share in sharp decline, notably in the high priced smartphone segment
- 2011 September: Nokia **outsources** Symbian software development and 2,300 employees to Accenture
- 2012: Symbian Belle renamed to Nokia Belle
- 2013: Nokia Belle Feature Pack 2 (latest version)
- 2014 January: No new applications can be published in the Nokia Store (store.ovi.com) [Nokia2013]
- 2015 January: Nokia Store discontinued and partially transferred to Opera Mobile Store.



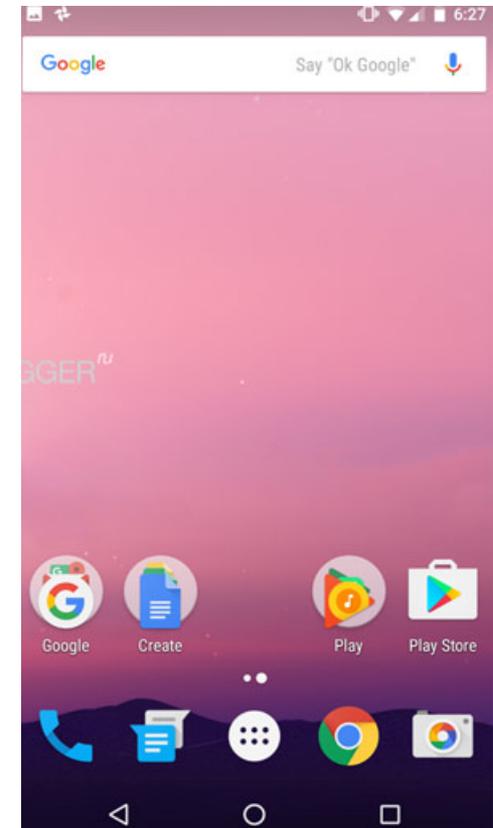
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- Linux is an „*Open Source*“ operating system.
- Only a limited amount of device manufacturers were offering devices with a pre-installed Linux solution (e.g. Motorola, NEC, Panasonic).
- However, there are several Linux distributions, such as μ CLinux, that can be installed on existing devices (e.g. iPAQ).
- Motorola, as one of the major mobile phone manufacturers, was using Linux as (one) of their OS platforms.

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- Google and other members of the **Open Handset Alliance** collaborated to develop and release Android.
- Open Handset Alliance (OHA) established in 2007
- Android based on modified version of Linux kernel
- October 2008: First commercially available phone running Android: T-Mobile G1
- October 2016: Version 7.1 (Nougat)

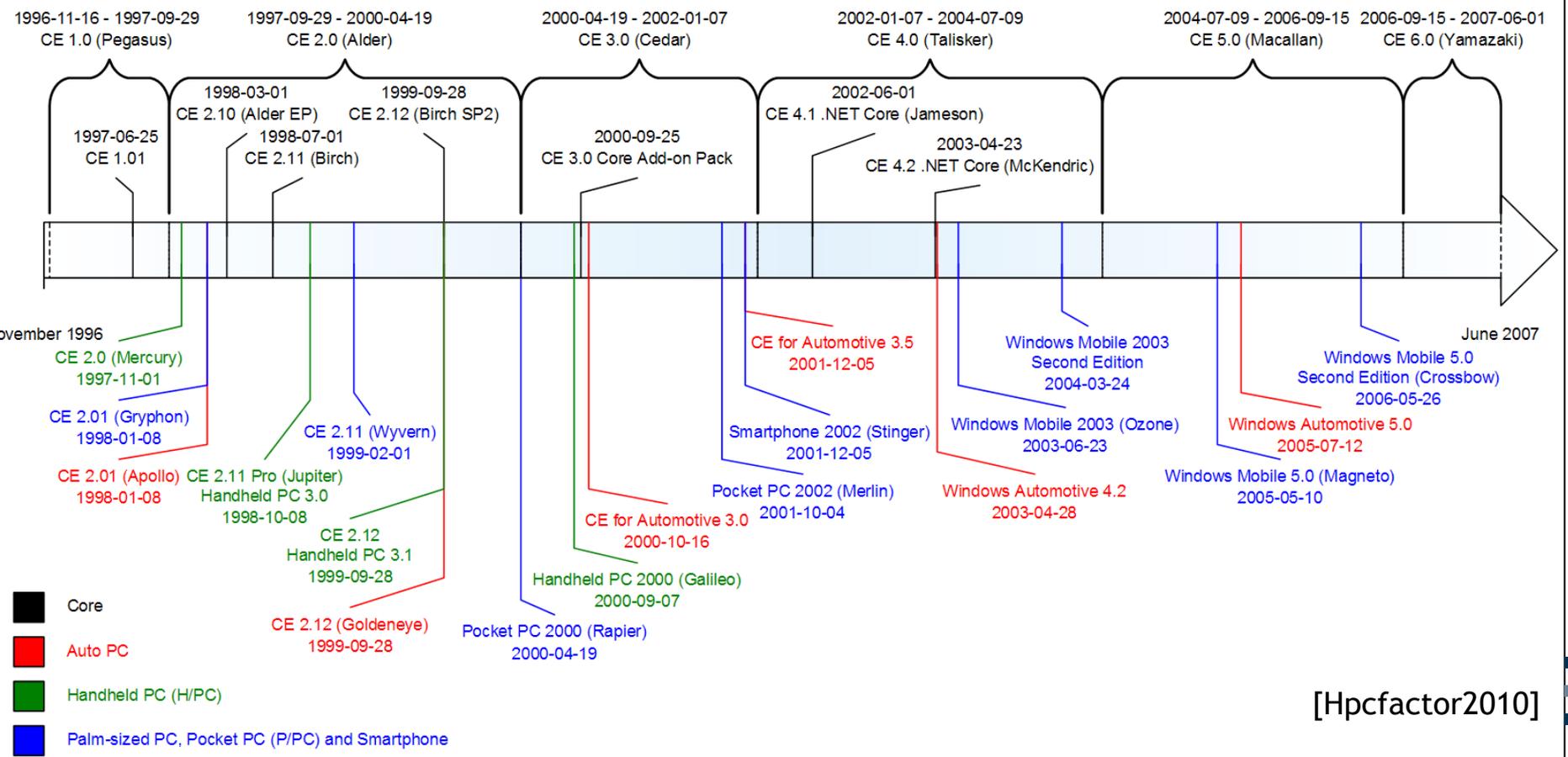


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Windows CE Timeline

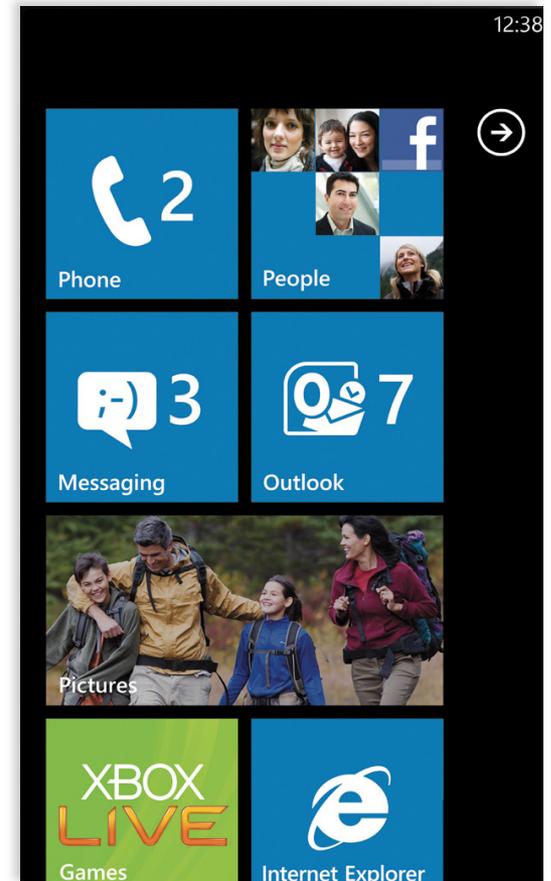
Source: "A Brief History of Windows CE" (<http://www.hpcfator.com/support/windowsce/>), HPC:Factor, retrieved May 21, 2007



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- Launched in October and November 2010
- Successor to Windows Mobile platform, but **technically a new and different platform without backward compatibility**
- Aimed at consumer market instead of enterprise market unlike Windows Mobile
- New user interface



Windows Phone

- Windows Phone 8 launched in October 2012 together with Windows 8 with similar optics
- Successor to Windows Phone 7
- Latest release: Windows Phone 8.1 in April 2014



- Windows 10 Mobile Insider Preview available in July 2015.
- November 2015: Supported phones include HTC One (M8) and 36 Lumia models.
- Other eligible Windows Phone devices can receive updates since March 2016.



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- Linux-based open-source mobile OS for smartphones and tablet computers
- Originally developed by **Mozilla**, a non-profit organization known for the Firefox web browser
- Focus on open standards, e.g. HTML5 applications
- 2012-02: Firefox OS first publicly demonstrated
- 2013-07: First commercial Firefox OS based phones launched:
 - *ZTE Open* in Spain by Telefónica
 - *Alcatel One Touch Fire* in Poland by Deutsche Telekom (also sold in Germany by subsidiary *Congstar*)
 - *LG Fireweb* in Brazil by Telefónica brand *Vivo*
- Mozilla expressed strong position on **user privacy**
 - Upon installation of applications, a reason is stated why certain rights are necessary and need to be granted by the user.
 - User data will be analysed locally on the device, not transferred to servers, exploited or traded.
- 2015-12: Mozilla announced to stop offering smartphones through mobile operator channels.
 - Possible pick-up: H5OS by Acadine Technologies
- 2016-09: Mozilla work on Firefox OS ceased.
- Latest release: 2.2.0 (2015-08)
- Latest developer version: 2.6.0 (2015-10)



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- Many mobile operating systems allow the execution of 3rd-party software:
 - Malware can be executed on mobile operating systems, either intentionally or by security leaks inside the mobile operating system (exploits).
- Possible threats for the user are:
 - Device malfunction
 - Loss of data (malware erasing data)
 - Loss of money (e.g. malware sending SMS to premium services)
 - Shorter battery runtime (more processing/resource usage)

Beginnings of mobile malware

- **09/2000:** Liberty Horse Trojan
- **12/2000:** Telefonica SMS Mailer
- **08/2001:** Flooder sends unwanted SMS
- **09/2001:** Phage erases data on Palm devices
- **02/2003:** Nokia V-Card exploit
- **09/2004:** First Symbian OS malware
- ...

Strong growth of mobile malware

- The number of malware programs masquerading as legitimate mobile apps grew by more than 600 percent in 2012
- Most popular target: Android



[ATD2013]



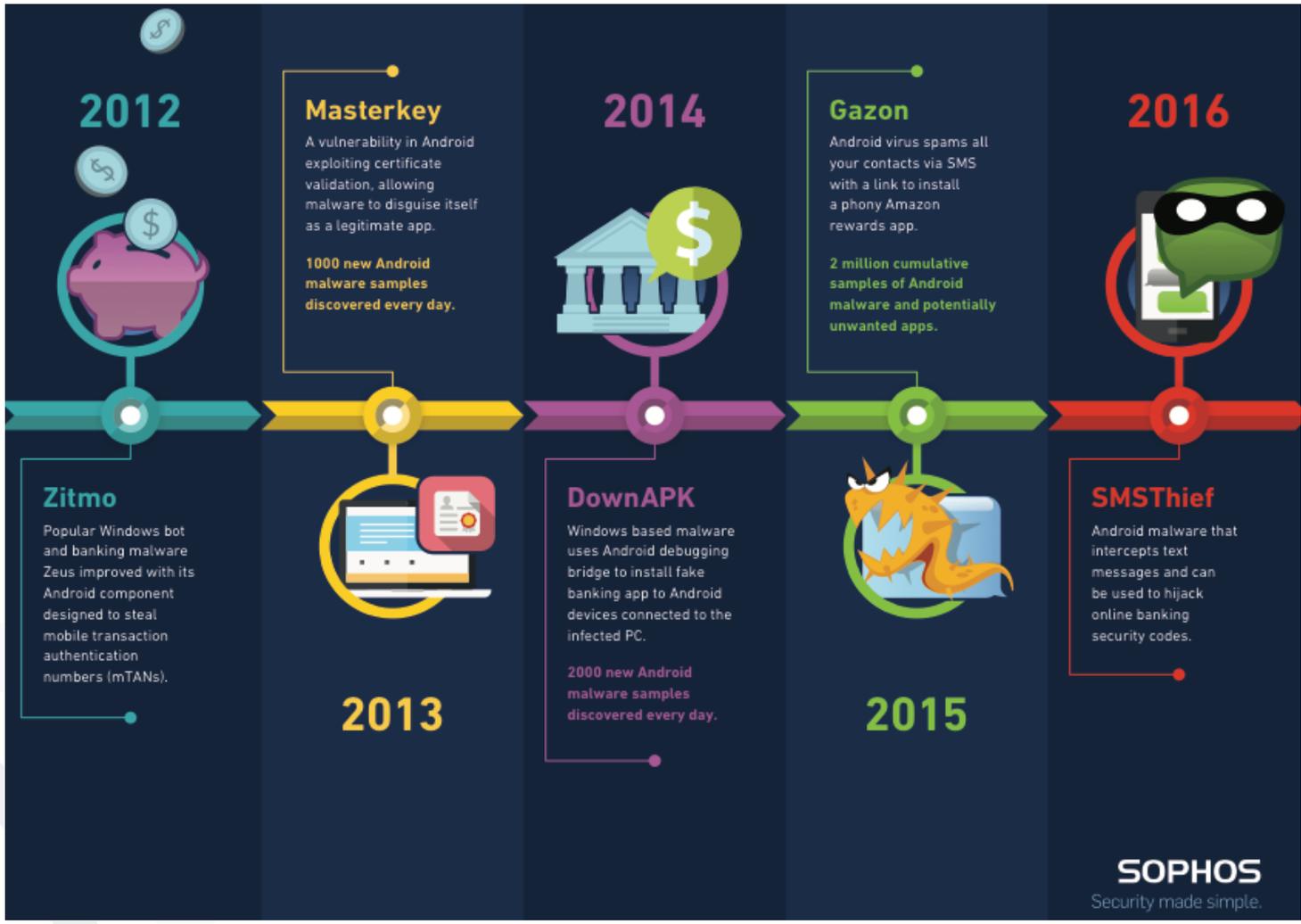
[Sophos2016]

Timeline mobile threats 2004-2011



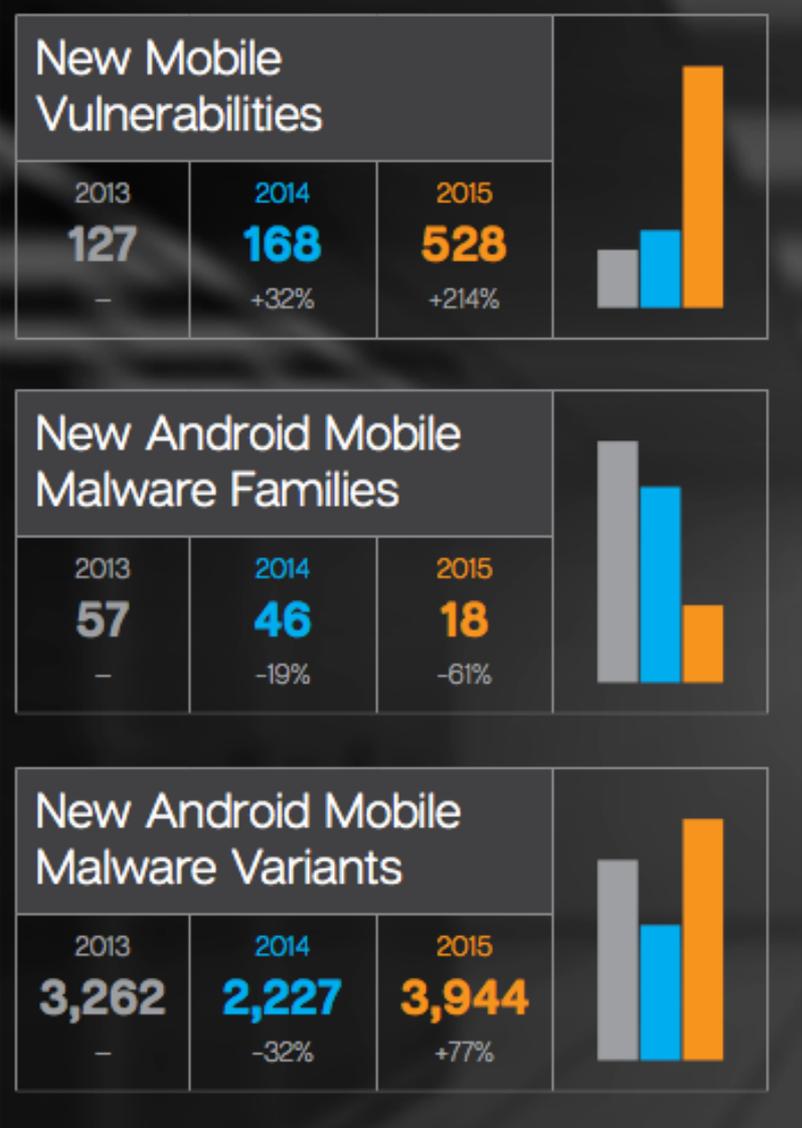
[Sophos2016]

Timeline mobile threats 2012-2016

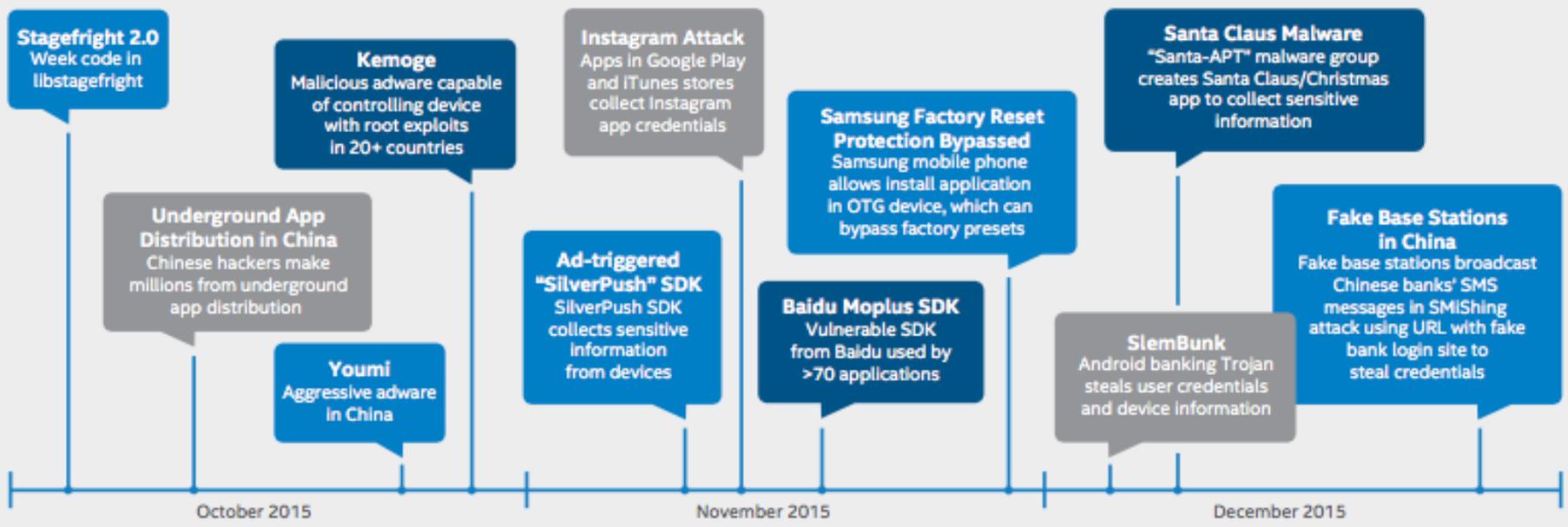


Mobile threats in numbers

	2013	2014	2015
Total Apps Analyzed	6.1 Million	6.3 Million	10.8 Million
Total Apps Classified as Malware	0.7 Million	1.1 Million	3.3 Million
Total Apps Classified as Grayware	2.2 Million	2.3 Million	3.0 Million
Total Grayware Further Classified as Madware	1.2 Million	1.3 Million	2.3 Million
Malware Definition	Programs and files that are created to do harm. Malware includes computer viruses, worms, and Trojan horses.		
Grayware Definition	Programs that do not contain viruses and that are not obviously malicious, but that can be annoying or even harmful to the user, (for example, hacking tools, accessware, spyware, adware, dialers, and joke programs).		
Madware Definition	Aggressive techniques to place advertising in your mobile device's photo albums and calendar entries and to push messages to your notification bar. Madware can even go so far as to replace a ringtone with an ad.		



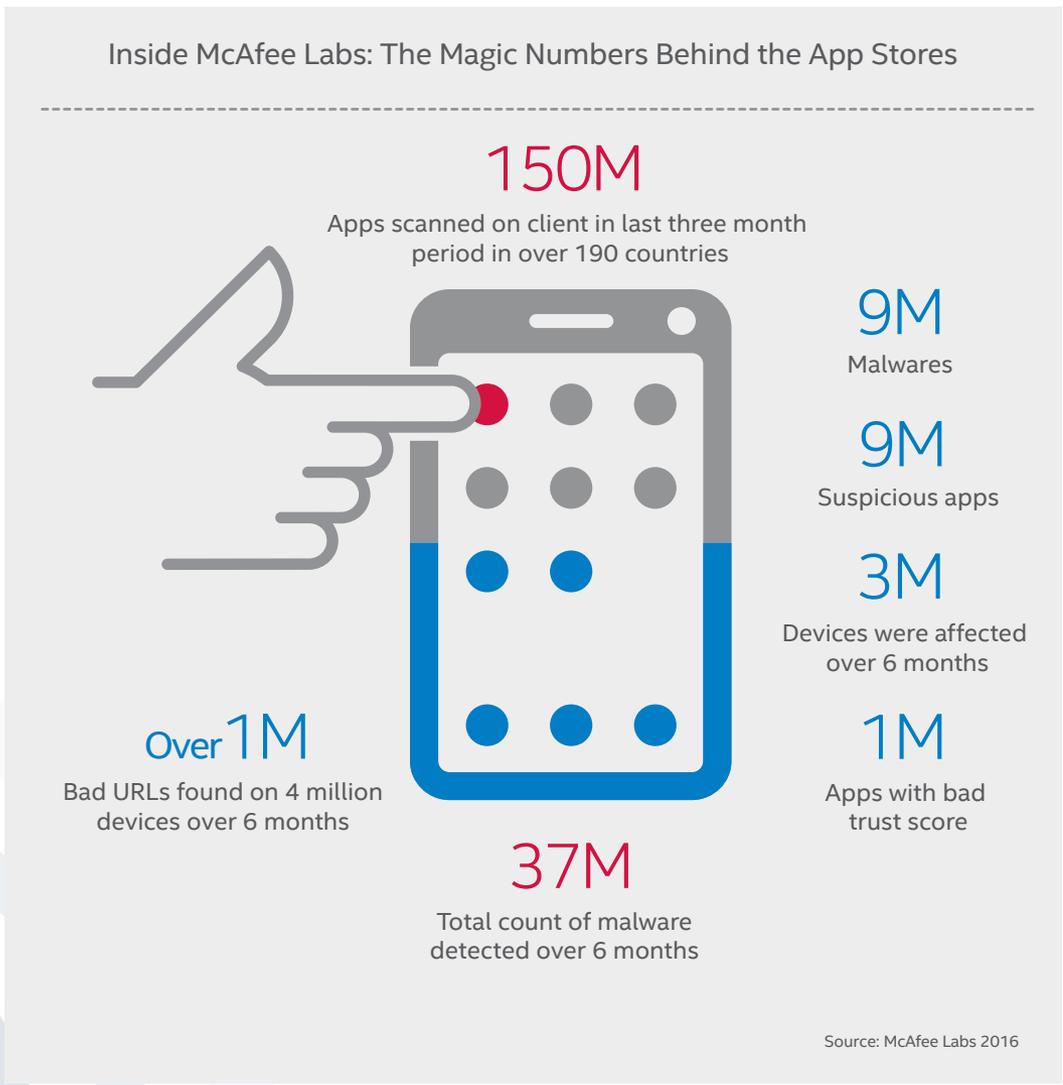
Noteworthy Mobile Threats: October – December 2015



Source: McAfee Labs 2016

[McAfee2016]

Mobile threats within 6 months in 2015-2016



[McAfee2016]

Further trends in the “attack landscape”

- Attacks are becoming commercial services for “customers” (e.g. distributed-denial-of-service).
- Mobile devices may get „recruited“ for executing attacks.
- States attack mobile devices upfront (e.g. FBI vs. Apple).

- Memory protection
 - Processes are not able to access the memory of other processes.
- File protection
 - Encryption
 - Access control
- Access controls
 - Definition of access rights and monitoring of their enforcement.
- Support for security modules
- Secure I/O
- Code integrity management: Integrity of programs is checked before they are started by e.g.
 - Checking certificates
 - Proof Carrying Code
- Additional security software may be needed, e.g.
 - Virus scanners
 - Firewalls

- Every user has certain assigned access rights, e.g.
 - Reading a file
 - Writing a file
 - Accessing a peripheral device
- The OS controls that users or the processes started by a user, can only execute those actions, which they are allowed to.

<i>Object</i> <i>User</i>	<i>File 1</i>	<i>File 2</i>	<i>File 3</i>	<i>Device's periphery</i>
<i>U1</i>	Read		Read	
<i>U2</i>				Print
<i>U3</i>		Read	Execute	
<i>U4</i>	Read Write		Read Write	

Security of operating systems

<i>Feature / OS</i>	iOS	Android	Firefox OS	Windows Phone	BlackBerry 10
<i>On-device encryption</i>	Yes (3rd party software may attempt brute-force attacks on password)	Yes, but insecure on Qualcomm devices	No	8+	Yes (3rd party software may attempt brute-force attacks on password)
<i>External storage encryption</i>	External storage not available	6+	?	8.1+ Apps and data only	Yes
<i>Sync to cloud communication encryption</i>	Yes	2.3.4+	?	7.10.7720.0+	Yes
<i>Remote device location tracking</i>	Yes	Yes	No	Yes	Yes
<i>Remote device locking and/or data wipe</i>	Yes	2.2+	No	Yes	Yes
<i>End-to-end encrypted push notifications</i>	Possible since iOS 7	Possible	?	Possible	?
<i>SSH Client</i>	Yes	Yes	?	Yes	Yes

- [ATD2013] Juniper Study Finds Mobile Malware Grew 600 Percent, Targets Android Most, <http://allthingsd.com/20130626/juniper-study-finds-mobile-malware-grew-600-percent-targets-android-most/>, accessed 2013-11-26.
- [Gartner2015] Gartner Group (2015), Gartner Says Worldwide Smartphone Sales Recorded Slowest Growth Rate Since 2013, <https://www.gartner.com/newsroom/id/3115517>, accessed 2015-11-06
- [Gartner2016] Gartner Group (2016), Gartner Says Five of Top 10 Worldwide Mobile Phone Vendors Increased Sales in Second Quarter of 2016 <http://www.gartner.com/newsroom/id/3415117>, accessed 2016-12-12
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