



Foundations for an Open Mobile Ecosystem (ODBC White Paper)

**Freedom of Choice Enabled by
Interoperability and Data Portability**

August 2026

Open Digital Business Consortium



ODBC (Open Digital Business Consortium) Mission

Enabling a Free Choice Environment

ODBC aims to create an environment where consumers can freely choose safe and trustworthy digital services.

Promoting Fair and Transparent Competition

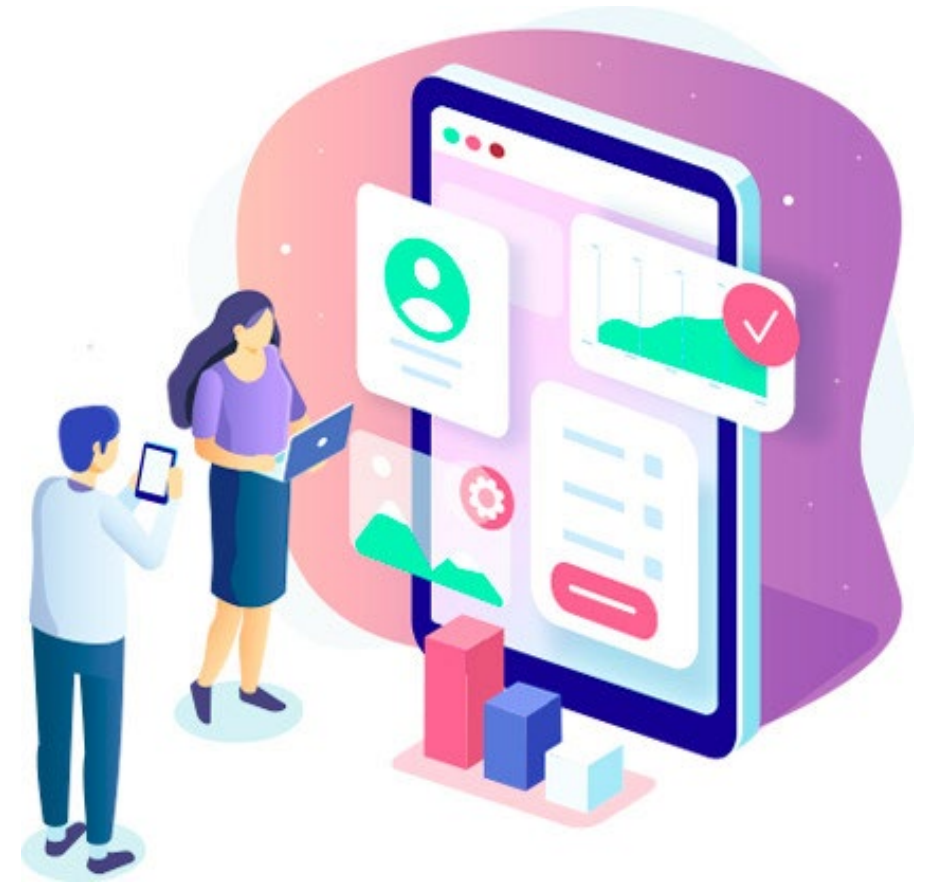
We work with governments and industry to build a fair and transparent competitive market.

Balancing Openness and Security

Through sound design and governance, we place equal emphasis on openness and security.

The Value of a Common Foundation

We regard interoperability and data portability as the foundation for sustaining trust across the market.



Why This Discussion Matters Now

The Mobile Software Competition Act (MSCA) Comes into Force

To promote competition in the mobile market, the Act regulates mobile OS and app distribution; it came into force in December 2025.

A Law Changes Nothing Unless It Is Implemented

Businesses must grasp the true intent of the framework and implement it in substance, not just in form. Achieving this requires stakeholders—government, businesses, and consumers—to translate it into action.

To overcome the psychological barriers that get in the way, the meaning and benefits of the framework must be shared in clear, accessible terms.



The Reality Consumers Face (Challenges)

Seamless within the same OS, inconvenient across a different OS

- Within the the same OS, features work smoothly, but across a different OS, file sharing and notification linking often become difficult.
- Many of these inconveniences stem from design and operational choices, and are technically solvable once interoperability is ensured.
- OS-level inconveniences pile up, leaving consumers tied to a particular ecosystem and narrowing their freedom of choice.

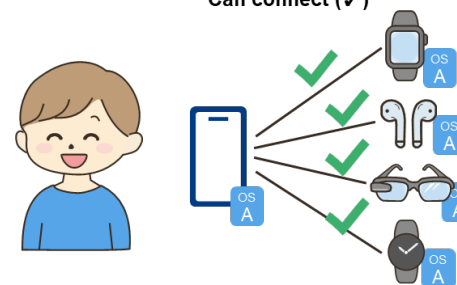
Most inconvenience arises not from technology but from design and operational decisions

- Common within the same OS, unavailable across a different OS
- The more experience users have, the more acutely they feel the inconvenience

Interoperability: Devices Can Connect

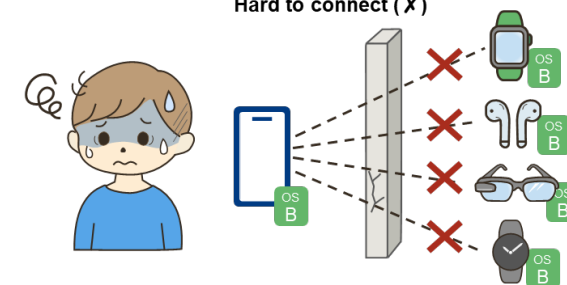
Within the same OS and same manufacturer:

Can connect (✓)



Across different Oss and different manufacturer:

Hard to connect (✗)



Data Portability: Data Can Be Moved

Within the same OS and same manufacturer :

Can transfer data (✓)



Across different Oss and different manufacturer :

Migration is uncertain / requires effort (✗)



What feels natural within the same OS becomes "partially inconvenient" across different OSs

Japanese Consumers Want Better Interoperability

The consumer survey shows a clear public demand for better interoperability between smartphone operating systems and across devices.

Survey Overview

1,100 respondents (valid sample)

Fielded: February 2026

Respondents: Men and women aged 15–69 residing in Japan

Design, fielding, and analysis: Mitsubishi Research Institute, Inc.



Consumers expect devices and services to connect seamlessly across manufacturers and operating systems.



Current ecosystem barriers may be limiting consumer choice and competition.



There is a clear public call for better interoperability between operating systems and across devices.

56.4% Say Devices Should Connect with Other Companies' Products

Most consumers believe manufacturers should design their devices to connect seamlessly with products from other companies.

56.4%

“Manufacturers should make their devices connectable with other companies' products”
(Q4_1)

43.7%

Rate interoperability as an important factor
(Q3_1)

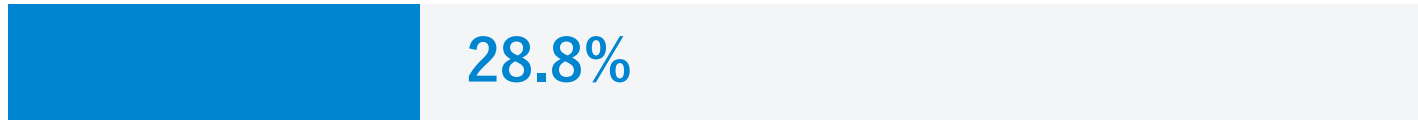
Implication This reflects consumer frustration with artificial barriers—and a market that is ready for change.

Interoperability Could Change Purchasing Behavior

If interoperability were guaranteed, how consumers choose smartphones and peripheral devices could change.

Say their purchasing decisions would change if interoperability were guaranteed

All respondents



Those who have tried connecting devices from different manufacturers



(Q3_14)

Latent demand

This latent demand is not yet fully visible because of current ecosystem constraints. The more experience consumers have with cross-device connection, the more concretely they anticipate the value of improvement.

Consumers Want Equal Convenience and More Choice

Expectations for better interoperability are not merely a technical interest; they are rooted in everyday convenience and freedom of choice.

49.7%

Equal convenience

“Want cross-brand devices to work with the same convenience as same-brand ones”

47.6%

More choice

“Want a wider range of product choices”

27.3%

Access to new features

New features and technologies previously locked to other ecosystems

25.8%

Lower costs

Expect lower costs from increased competition

(Q3_15 et al.)

Ecosystem Lock-in Is Suppressing Choice

About one in four consumers has avoided or hesitated to buy a product from a different manufacturer or OS because of interoperability concerns.

25%

Consumers who avoided or
hesitated to buy
due to interoperability concerns

Data migration anxiety

Uncertainty about safely moving photos, contacts, and app settings to a new device.

Broken connectivity

Concern that other companies' peripherals and services won't fully connect.

Service continuity concerns

Fear of losing access to features and data they have relied on.

Anxiety over Data Migration, Connectivity, and Service Continuity

The top three reasons for hesitation are concrete concerns, each cited by roughly 30% of consumers.

34.9%

Data migration anxiety

Can photos, contacts, and apps be moved safely?

33.3%

Broken connectivity

Hard to connect with other companies' peripherals and services

32.1%

Service continuity concerns

Can existing features and data be carried over?

Source: ODBC Consumer Survey (n=1,100, February 2026). Figures show the share citing each as a reason for avoiding or hesitating to purchase.

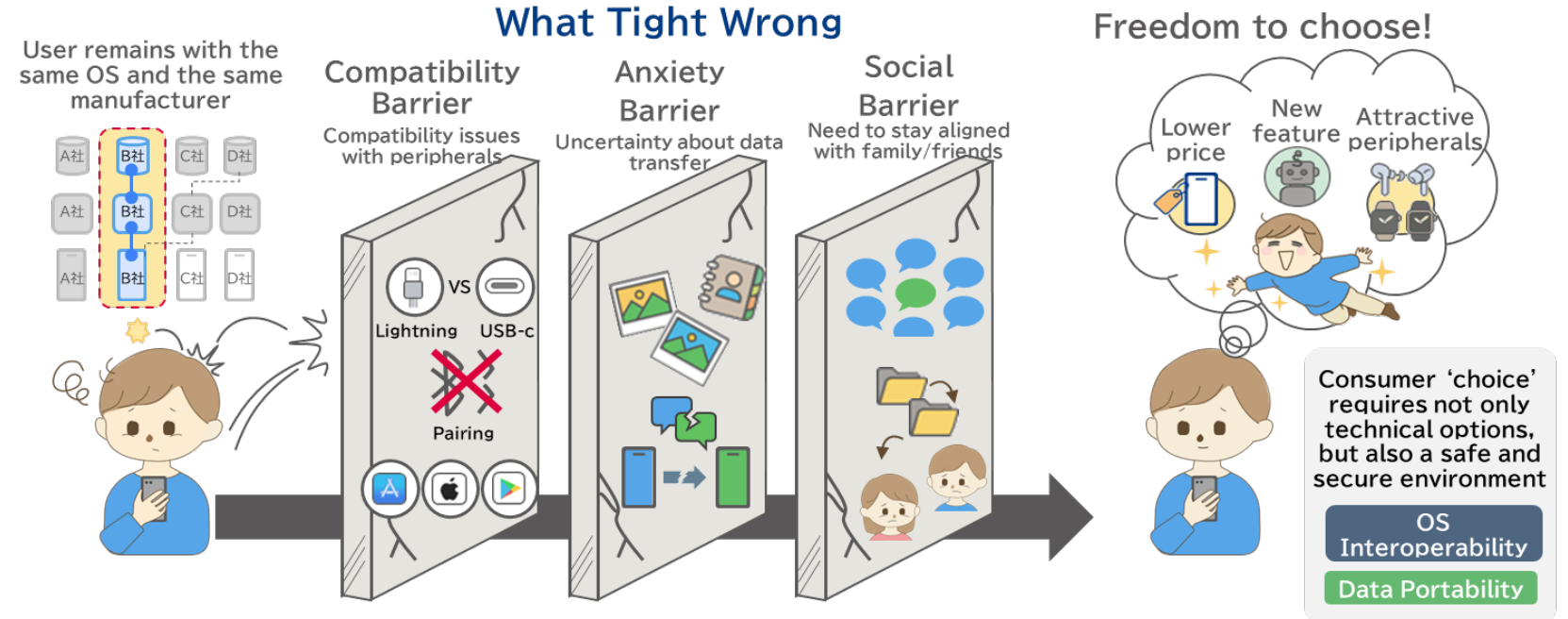
Choice Isn't Driven by Personal Preference Alone

There is a strong tendency to match the OS of family and peers, so device choice is shaped by social dynamics that go beyond individual preference.

About
40–50%

Report using the same
OS as their family

It Feels Like Choice, but the Reality is Different



Inconvenience is structural, Not Your Fault

Source: ODBC Consumer Survey (n=1,100, February 2026).

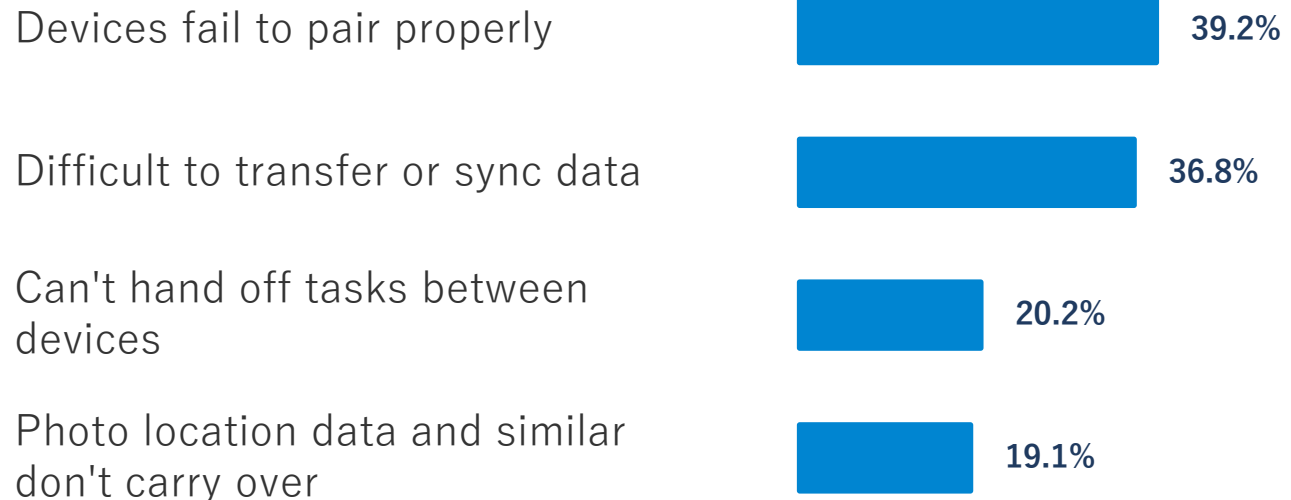
Inconvenience Is Not Abstract—It's Daily Friction

Nearly three-quarters of experienced users report concrete inconveniences, with friction such as pairing and data migration occurring daily.

74%

Share of users who experienced interoperability-related inconvenience

Most common inconveniences (top 4)



Source: ODBC Consumer Survey (n=1,100, February 2026). Figures are response rates among experienced users.

Restoring Freedom of Choice, Competition, and Innovation

Securing interoperability and data portability is the key to broadening consumer choice and restoring fair competition and innovation.

Today: Friction from Lock-in

- Connecting and switching across OSs is difficult
- Data migration anxiety constrains purchasing decisions
- Choice narrows and competition struggles to work



Future: Choice Enabled by Interoperability

- A safe and trustworthy choice environment is in place
- Consumers can freely compare, switch, and combine
- Fair competition drives innovation

Consumers Support Securing Interoperability Through Regulation

Recognizing that market forces alone will not deliver interoperability, consumers back the MSCA's interoperability mandate—about 40% agree, while only 3.7% are opposed.

**About
40%**

Agree with the intent of
the MSCA's
interoperability
mandate

3.7%

Oppose the mandate

Where Consumer Consensus Points

56.4% support

Manufacturers should make their products connectable and interoperable with those of other companies (Q4_1).
A growing consensus holds that a regulatory framework is needed to ensure fair competition and protect consumer interests.

Source: ODBC Consumer Survey (n=1,100, February 2026, Q4_1 & Q4_2).

The Digital Market ODBC Envisions

A Free Choice Environment

Consumers are not bound by any OS or provider, and can freely choose services that fit their own needs.

Ownership of Personal Data

Personal data belongs to users themselves and can be carried safely and freely.

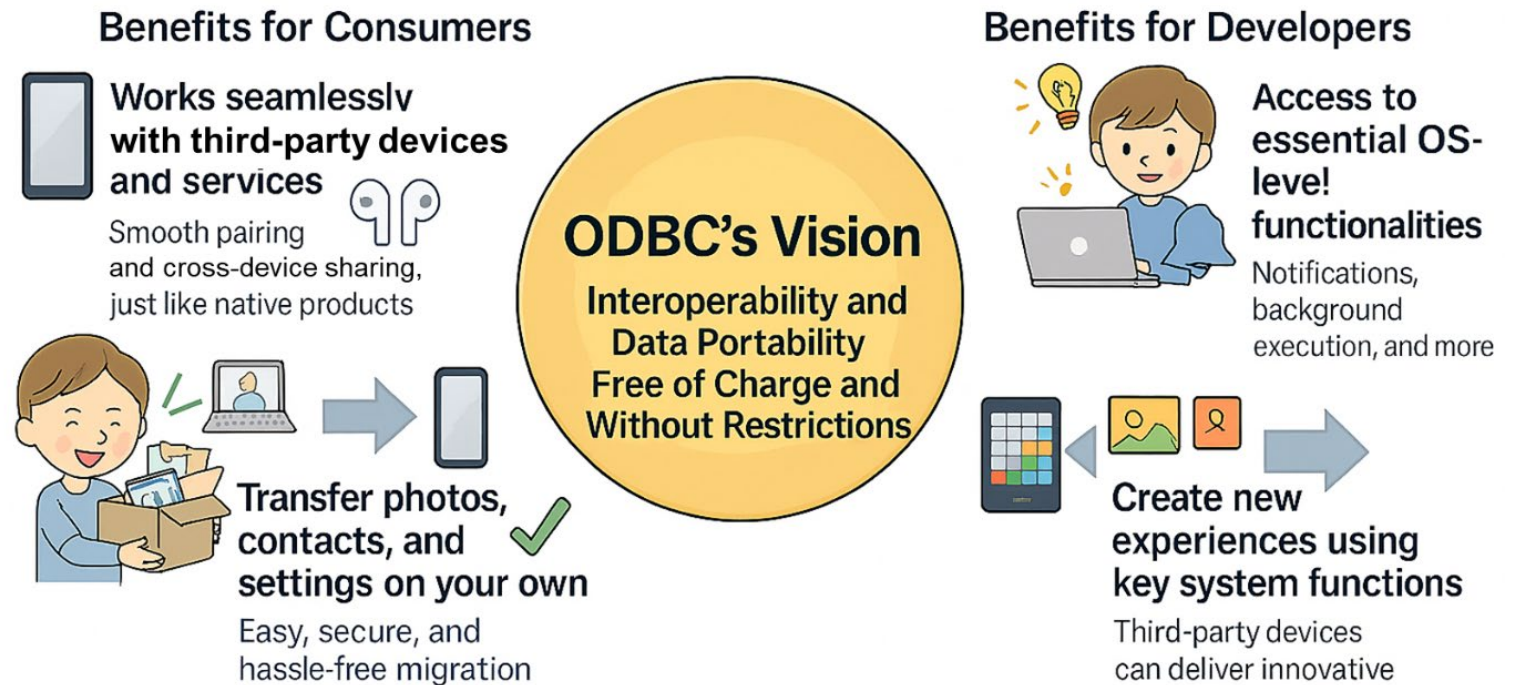
Developers Focus on Value

Developers can focus on delivering service value rather than conforming to a specific platform.

A Foundation for Sustainable Growth

Built on interoperability and data portability, an open market supports growth for society as a whole.

ODBC's Vision for the Future: Universal Connectivity and Data Portability



Toward an open market where freedom of choice and innovation

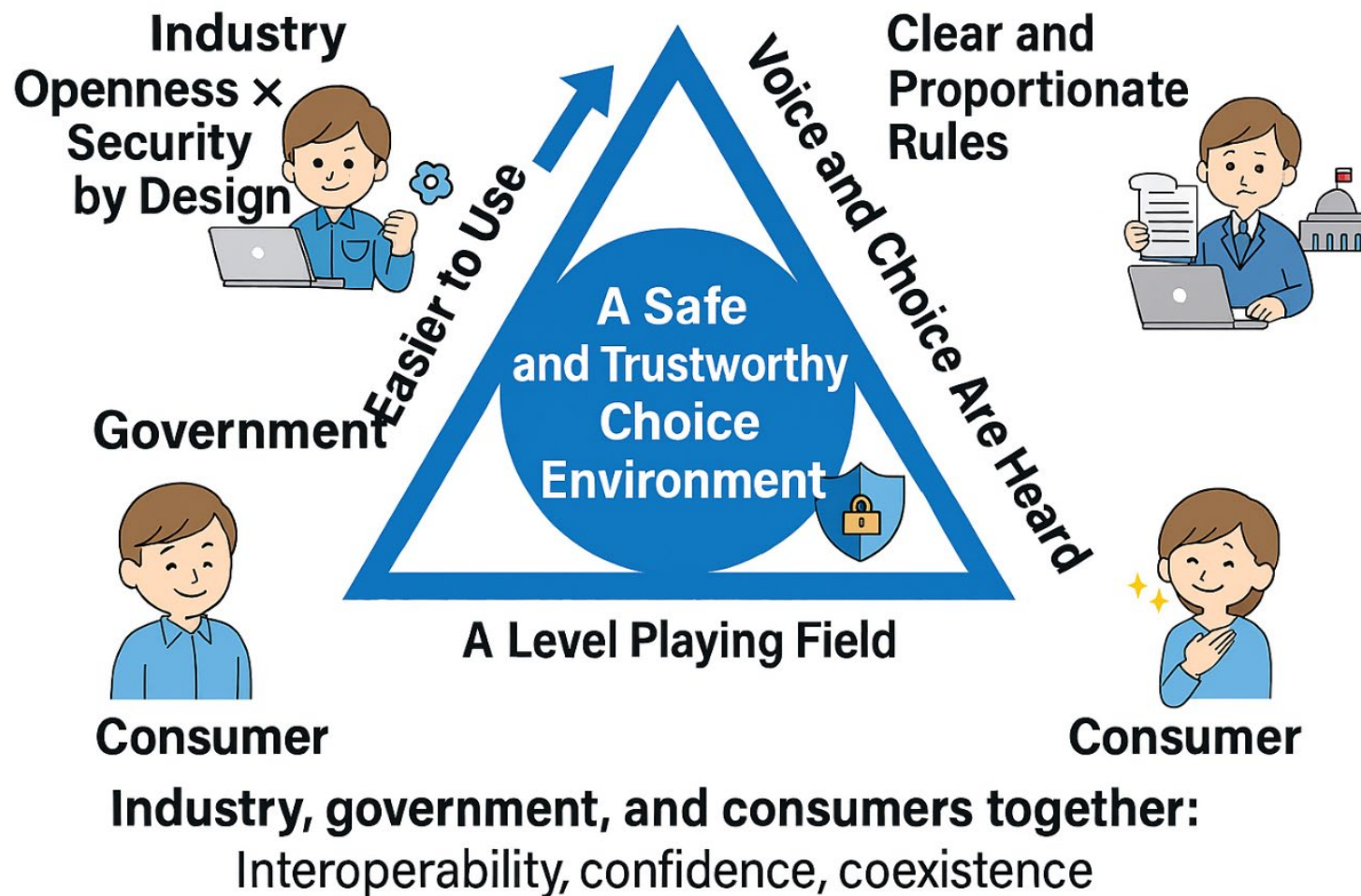
Interoperability and data portability are social infrastructure

OS Interoperability: Concrete Functions Worth Securing

In Europe, interoperability for the following nine OS functions must be secured **“free of charge and without restriction”**.

	OS notifications	Receive, display, and act on iOS notifications on other companies' devices too
	P2P Wi-Fi	High-speed, high-capacity device-to-device communication at close range
	Proximity pairing	Pair easily just by bringing devices close
	Background execution	Keeps running without opening the app
	Close-range file transfer	AirDrop-like simple, fast file sharing
	Automatic Wi-Fi connection	Share Wi-Fi settings between devices and connect automatically
	Media casting	Easily play and share audio and video on other devices
	Automatic audio switching	Automatically switch audio output between earphones and other devices
	NFC functionality	NFC-based reading and writing

Messages to Industry, Government, and Consumers



The Role of Industry

Design that reconciles openness with security is itself a source of long-term competitiveness.

The Role of Government and Regulators

Government supports interoperability through clear, sensible rules and public communication. It should clearly position interoperability as a common foundation, provided free of charge and without restriction as a matter of principle.

The Role of Consumers

In a market with broader choice, consumer behavior drives competition and innovation.

ODBC's Role

ODBC is a platform that fosters dialogue, implementation, verification, and improvement among diverse stakeholders.

In Summary: A Market Chosen for Innovation and Value, Not Lock-in

Today's barriers do not reflect consumer preferences—they distort them.
Securing interoperability restores freedom of choice, fair competition, and innovation.

Freedom of Consumer Choice

Freely compare, switch,
and combine across OSs

Fair Competition

An environment where
players compete
on value and user
experience

Innovation

New features and services
keep emerging

Interoperability and data portability are the foundation of a safe and trustworthy choice environment.
Industry, government, and consumers will advance this together.



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Appendix 1: Survey Overview

This report is based on an online survey of 1,100 men and women aged 15–69 nationwide, conducted in February 2026.

Survey lead	Open Digital Business Consortium (ODBC)
Fielding	Mitsubishi Research Institute, Inc.
Survey period	February 2026
Method	Online survey (weighted aggregation)
Respondents	Men and women aged 15–69 nationwide
Valid responses	n=1,100

Note: Percentages may not sum to 100% due to rounding.

Appendix 2: Key Figures at a Glance

A summary of the key consumer-survey figures cited in this report.

Metric	Value	Question
Devices should be designed to connect with other companies' products	56.4%	Q4_1
Rate interoperability as important	43.7%	Q3_1
Purchasing decision would change if interoperability were guaranteed	28.8%	Q3_14
Avoided/hesitated to buy a different OS due to concerns	25%	Q3_8
Migration anxiety is the biggest barrier (data & settings)	34.9%	Q3_9
Experienced users who felt some inconvenience	74%	Q3_2
Support the MSCA's interoperability mandate	About 40%	Q4_2
Know neither the term nor the concept of “interoperability”	58.9%	Awareness

Source: ODBC Consumer Survey (n=1,100, February 2026, Mitsubishi Research Institute, Inc.). Figures may not sum to 100% due to rounding.