Fragmentation vs Interoperability

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Mobile Applications Shops

- Use of mobile Internet is still low (14% EUR, 12% US)
- Mobile browsing falls short of convenience
  - Relevance, speed, perceived cost, ergonomics = complex and painful
- Apple set up a winning model
  - 20m iPhones, 50000 developers, 800000 SDK downloads, 30000 apps, 1 bn app downloads
- This model is being applied by all actors leading to a strong fragmentation
  - Handset makers (e.g. Nokia OVI, Samsung & LG)
  - Cellcos (Vodafone Betavine, Orange, China Mobile with its own Android phone and shop)
  - The LiMo initiative (54 members; 33 handsets so far; commitment by China Mobile)
  - GYM (Google Android Market - 20 smartphones eoy, Microsoft Skymarket) and small players
  - Smartphone sales increase from 60m (6%) in 2006 to 180m (15%) in 2008
  - Key Success Factors: developers’ support, device range, global brand and visibility/awareness
Which model in two years?

- Google seems to allow Android shops without Google (cf. China Mobile)
  - 3 options: Obligation-free (no Google)
  - Small Strings (Google apps)
  - Google Experience (and logo)

- Android still has to gain market share against Nokia, Apple (and Linux)

- Some telcos investigate alternative scenarios based on standards and Open Source

Initiatives on:
- LiMo
- OMTP/BONDI
- JIL (w/ China Mobile, Verizon, Softbank)
- Azingo deal

Supports Vodafone and JIL
Launches a Lenovo device with its own Android without Google applications
Let us dream

- Linux OS come on mid-range cellphones
- Standard APIs between Runtime Environment and OS (cf. OMTP BONDI)
- Standard SDK to develop Applications whatever the device
The same phenomenon appeared in IM

- Microsoft was the uncontested leader with Hotmail/Live Messenger (320m users)
- Instant messaging has now become a commodity in Facebook, MySpace, Twitter, BeBo, QQ, etc.: is it superseding Microsoft?

Next step is on Mobile
The RCS initiative (Rich Communication Suite)

- On Mobile, only Voice and SMS are interoperable with open and public specifications and interconnection protocols.

- The arrival of NGN/IMS provides improved network capabilities and open the door to the same software client end-to-end, based on IP technologies.

- Beyond voice and SMS, there is a need for other communication practice:
  - Voice, text, images
  - Real or Non Real Time (synchronous vs asynchronous)
  - Sharing
  - Remote access to data
A standard in GSMA

- **Enriched Call**
  - Call enriched with multimedia sharing

- **Enhanced Address Book**
  - Contacts enhanced with capabilities and rich presence

- **Enhanced Messaging**
  - Conversational messaging experience
An industry momentum: achievements and next steps

- S2 2007: Demo in 3GSM
- S1 2008: Demo in Paris, Macau
- S2 2008: RCS phase 1 specifications
- S1 2009: Interoperability tests
- S2 2009: Demo in 3GSM
- S1 2010: French tri-op RCS trial
TV widgets appear on the market

- Intel and Yahoo! launched the buzz in Las Vegas (CES Feb 2009)
  - Demos by Samsung, LG, Sony, Toshiba
  - Agreements with Comcast and Verizon on their STBs

- Some manufacturers start proprietary development (Sharp, Panasonic)

- IPTV operators put widgets in their STB
  - Cf. Comcast, Verizon, Orange

- Others
  - Portals (cf. AcTVila)
  - Box providers propose widgets (eBay, Netflix, Facebook)
Keys to avoid fragmentation

➔ Let us dream
➔ A standard browser
➔ A standard Widget engine
➔ Standard Middleware
➔ Standard APIs

➔ Something to do with Mobile ??!!?

Source: Intel
Thanks!