Fragmentation vs Interoperabilty

Jean-Pierre Temime, France Telecom-Orange

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**

vodafone

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

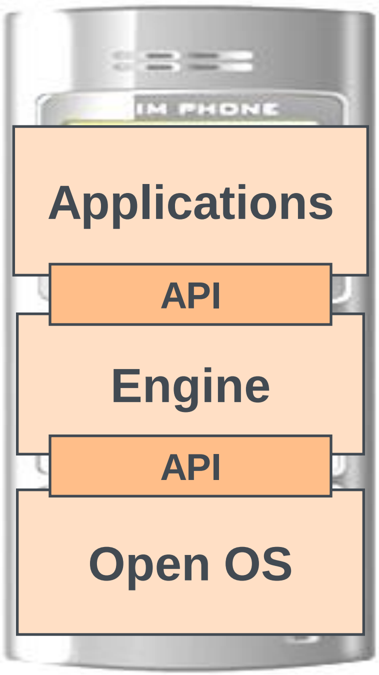
中国移动通信
CHINA MOBILE

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

orange

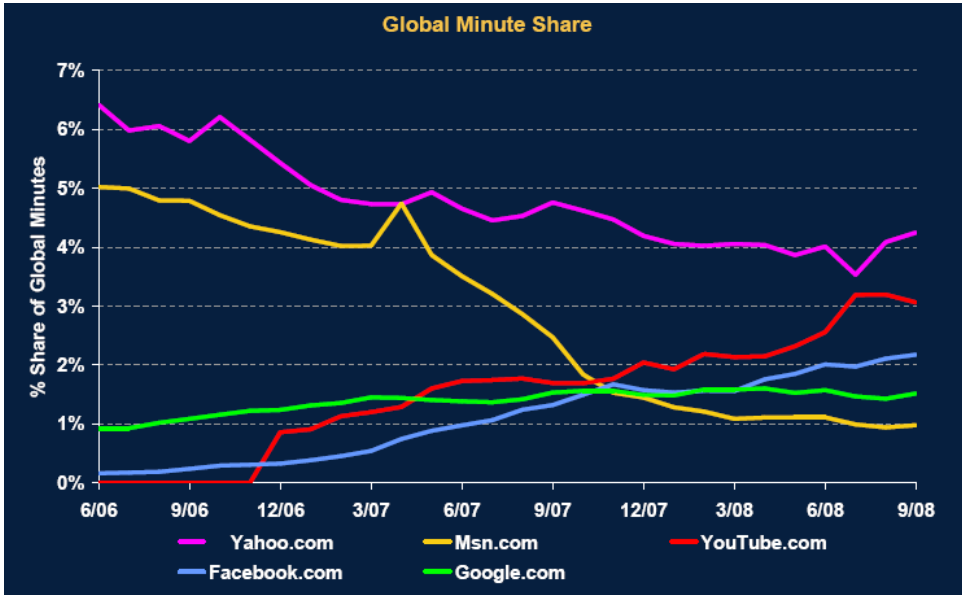
Let us dream

- ➔ 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 ?

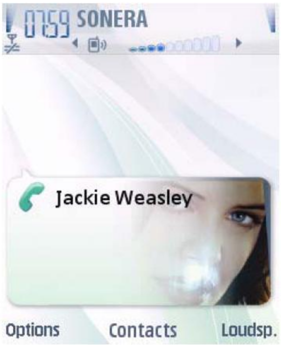


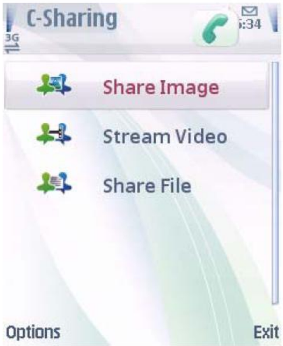
- Next step is on Mobile

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

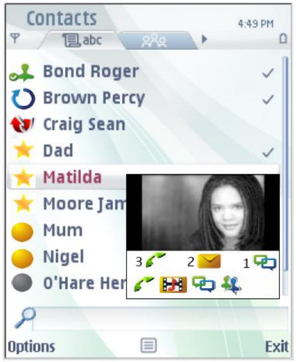
A standard in GSMA

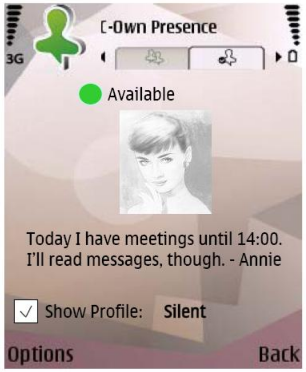




→ Enriched Call

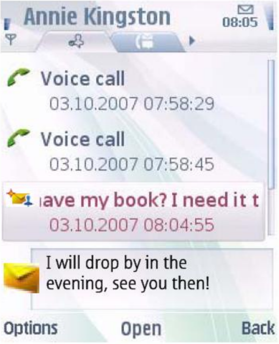
- Call enriched with multimedia sharing





→ Enhanced Address Book

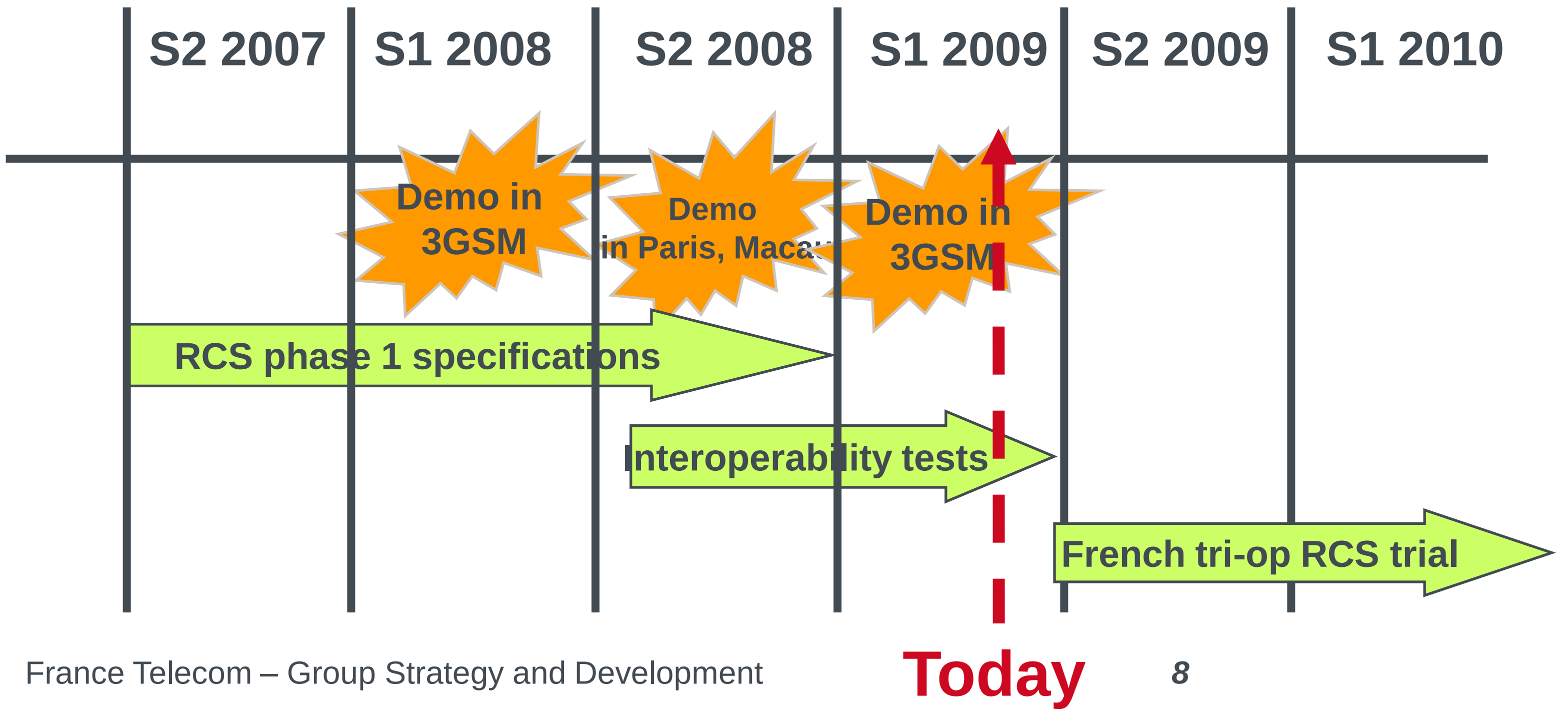
- Contacts enhanced with capabilities and rich presence



→ Enhanced Messaging

- Conversational messaging experience

An industry momentum: achievements and next steps



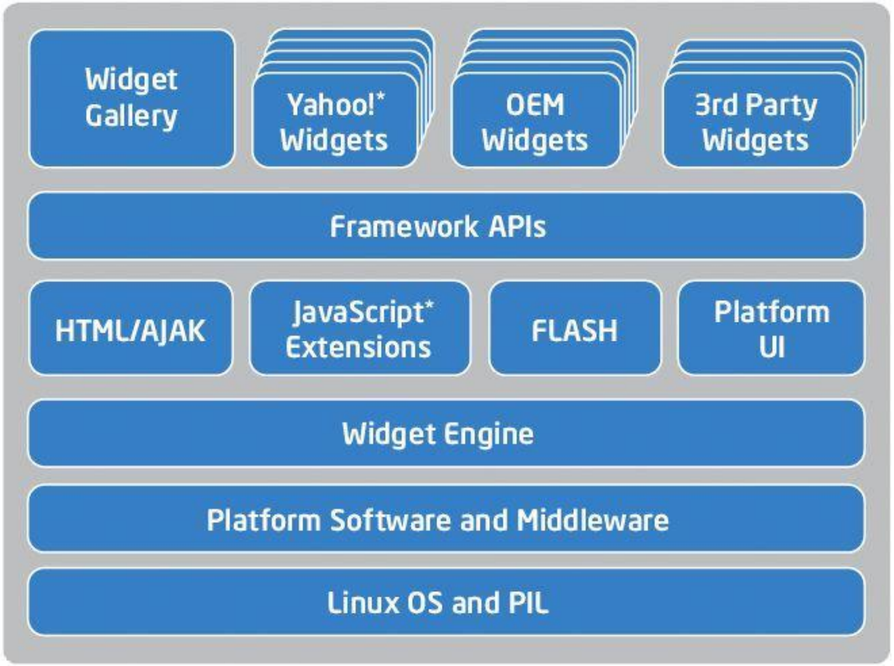
TV widgets appear on the market

- **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



Source: Intel

- ➔ Something to do with Mobile ??!!?

Thanks！